Oracle® Marketing

User Guide

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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Marketing User Guide.*

This guide is intended for marketing professionals.

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

- The principles and customary practices of your business area.

- Oracle Marketing

- Oracle Applications Framework

- Oracle Self-Service Web Applications

- The Oracle Applications graphical user interface

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

See Related Information Sources on page xvii for more Oracle Applications product information.

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Structure

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Oracle Marketing Implementation Guide

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

Oracle Advanced Pricing User's Guide

This document provides information required to set up pricing features of Oracle Marketing.

Oracle Application Framework Personalization Guide

This guide describes how to personalize Oracle Application Framework-based Oracle E-Business Suite application pages as an end-user and as a personalization administrator using the Oracle Application Personalization Framework.

> **Note:** Oracle Marketing does not contain any end-user personalizable regions, and there are no special considerations that you need to be aware of when creating administrator-level personalizations of its regions or pages. For general information about how to create personalizations, refer to the *Oracle Application Framework Personalization Guide*.

Oracle Content Manager Implementation and Administration Guide

This guide covers how to create, manage, publish, and view electronic content such as cover letters to be sent to customers or design documents for internal use only.

Oracle Discoverer Administration Guide

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

Oracle One-to-One Fulfillment User Guide

Oracle One-to-One Fulfillment compiles and sends content, such as product literature, proposal templates, and welcome letters to an output device including e-mail, fax, and print. This guide describes how to create and process fulfillment requests.

Oracle *iStore* Implementation and Administration Guide

This guide explains how to add web ads and offers to a web site

Oracle Product Lifecycle Managment User Guide

Marketers define products, product bundles, and product relationships in Oracle Product Lifecycle Management. This guide covers how to do define the products that become available in the product catalog available across the E-Business Suite of applications.

Oracle Proposals User Guide

This guide explains how to set up the proposal templates used by marketing activities as collaboration content.

Oracle Sales User Guide

This guide covers the Sales module used by field sales representatives, sales managers, and executives.

Oracle Scripting User Guide

Marketers can design a scripted flow of interactions as follow up to marketing campaigns. This guide covers how to set up scripts.

Oracle TeleSales User Guide

This guide describes how inbound telesales agents and outbound telemarketing agents manage the sales cycle from beginning to end. For example, agents can send marketing collateral and register customers for marketing events.

Oracle Trade Management User Guide

Refer to this guide for information about setting up offers, such as coupons or discounts.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

This document explains how to use Web ADI to export information to spreadsheet, make changes, and import the changed or new data back into the Oracle E-Business Suite. Oracle Marketing uses Web ADI for setting up campaign activities using spreadsheet.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

1

Oracle Marketing Overview

This chapter covers the following topics:

- Product Overview
- Key Features and Functions
- Key Benefits
- Oracle E-Business Suite Integration Points

Product Overview

Oracle Marketing drives profit, not just responses, by intelligently marketing to the total customer/prospect base. By leveraging a single repository of customer information, you can better target and personalize your campaigns, and refine them in real time with powerful analytical tools.

With tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives, Oracle Marketing provides you with:

- **Customer Insight** - With sophisticated customer management and list generation, Oracle Marketing enables you to quickly generate target lists and segments using an intuitive user interface. The easy to use Natural Query Language Builder (NLQB) lets you query for customers or prospects using a natural language while hiding data complexity; fatigue management ensures that you do not over-contact the same customers with marketing messages; and predictive analytics helps you predict customer behavior that you can leverage to produce significant increases in marketing return on investments (ROI).

- **Sales Alignment** - Oracle Marketing's leads management helps you compile and distribute viable leads so that sales professionals can follow up valuable opportunities and not just contact interactions. Additionally, support for distributing proposals and marketing material drive speedy and consistent setups and collaboration of best practices.

- **Marketing Insight** - While Oracle Marketing Home page reports and Daily Business Intelligence (DBI) for Marketing and Sales provide aggregated management level information in almost real time, operational metrics help in tracking the effectiveness of individual marketing activities.

Key Features and Functions

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

Campaign Planning and Execution

Oracle Marketing enables you to create, execute, track, and analyze marketing campaigns. Using intuitive interfaces such as the Campaign Workbench, you can quickly define campaign attributes and sophisticated performance metrics to evaluate effectiveness. You can set up repeating activities to automate the complex multistage campaigns, based on customer events (implemented as NLQB for target group selection), and time period. Monitors initiate activities based on conditions, where these conditions can be set to watch the changes in the campaign or activity performance measures (metrics).

Oracle Marketing can also help you execute campaigns across multiple customer interaction channels such as Web, e-mail, direct mail, and telemarketing. You can also set up schedules that will repeat based on customer events and defined conditions. You can set up fatigue rules to define contact limits by time period and by channel.

Concerted media planning may be necessary as part of a marketing plan. You can use the spreadsheet interface of Web ADI to easily create or update large numbers of campaign activities across campaigns.

Segmentation and List Management

The Audience Workbench of Oracle Marketing supports sophisticated segmentation strategies, complex segment hierarchies, and powerful yet easy to use list management. It provides functionality to import, deduplicate, profile, and analyze customer and prospect data. You can use the intuitive natural language query methodology to generate campaign specific target lists from multiple data sources. You can also quickly create lists based on user-defined criteria within Oracle Discoverer or by splitting or merging existing lists. You can import external customer and prospect lists (in CSV or XML format) and refine them with user-defined rules to purge duplicate records. You can also search the customer database (TCA) to find specific entries and add them manually to target lists.

Predictive Modeling and Scoring

Oracle Marketing is seamlessly integrated with Oracle Data Mining to provide a closed-loop process for predicting customer behavior. With this integration,

non-technical marketers can use automated templates to build predictive models for common marketing scenarios, including campaign response probability, customer retention risk, and product affinity. Custom predictive models can also be leveraged to predict user-defined customer behaviors.

After building a predictive model, you can evaluate the model's effectiveness and accuracy. By intelligently targeting only those prospects with a high propensity to exhibit a desired behavior (for example, respond to a marketing campaign), you can increase marketing ROI by decreasing the number of contacts and increasing the response rate. If you must operate within a budget or other constraints, you can perform an optimal targeting analysis to identify the ideal audience to target in a campaign.

Web Activities

Oracle Marketing supports the targeting of online visitors with personalized Web advertisements, Web offers, or product recommendations.

Budget and Cost Management

The budgeting feature enables you to create, associate, and manage budgets and checkbooks. The Budget and Cost Management functionality supports a budget hierarchy to define unlimited sub-budgets. You can transfer funds between different campaign budgets, and the marketing checkbook helps you track the budget amount allocated to a campaign.

Promotion Management

You can use Oracle Marketing to create discounts and offers that can be fulfilled across all channels such as Web stores and Oracle TeleSales. You can create a variety of offers, such as off-invoice discounts, tiered discounts, free shipping terms, and buy-one-get-one-free offers. Moreover, offers can have a unique coupon code and a maximum number of usages tied to specific budgets, thereby limiting liability.

Product Creation and Maintenance

Products and product hierarchies are created using Oracle Product Lifecycle Management. See the *Oracle Product Lifecycle Management User's Guide*.

Pricing Management

In Oracle Marketing, a marketer can create a price list and apply it across the Oracle E-Business Suite. This enables users to respond rapidly to market conditions.

Deliverable and Message Management

Oracle Marketing provides a complete solution to create and maintain marketing-related deliverables and collateral. It also enables the bundling of multiple collateral kits. These collateral and collateral kits can be actual inventory items, and fulfilled by telesales agents like any other inventory item.

Event Logistics Management

As an event coordinator, you can plan, create, and execute events, incorporating relevant information such as invite list, agendas, registration start and end dates, budgets, and resources. You can also define registration rules, "invite only" events. The registration rules can be enforced when a telesales agent or marketer registers a customer to an event. Web-based event registration is enabled through Oracle Marketing integrating with Oracle Scripting. Event invitations can be sent out through event activities and automatic e-mail notifications can be sent to event registrants about changes in event logistics. Marketers can also select event registrants and attendees to generate leads.

Response Management

To initiate and manage customer responses, click-through destinations allow you to easily insert complex, structured URLs in the content of an e-mail or Web campaign. These trackable URLs are used to track customer responses to the campaigns as well as to direct the customers to the appropriate next step. The next step may be to send customers to a specific Oracle *i*Store page, or to start a Web script. Web scripts are created with Oracle Scripting and are used to establish an interactive, personalized conversation with customers. Sample scripts for lead creation, event registration, and data acquisition are provided with Oracle Marketing.

You can also define and use Web site Response Handler URLs (pretty URLs or Landing Page URLs) to invite and track Web channel responses via advertising activities or to publish Web activities on third party affiliate sites (such as Yahoo or CNN).

Analysis and Reporting

Oracle E-Business Intelligence (Daily Business Intelligence) and Oracle Marketing's Home page provide comprehensive out-of-the-box reports and charts for analyzing the following aspects of the marketing process: budgets, campaigns, events, activities, and leads. The reports provide a complete view of the Campaign to Order business flow by leveraging data from across the Oracle E-Business Suite. Each user can configure the Marketing Home Page to include the most relevant reports for their responsibility. Using these reports, you can quickly see your top and bottom performing activities and take proactive steps to increase marketing effectiveness.

Leads Management

Oracle Leads Management provides a central engine for capturing, cleaning, deduplicating, and grading all sales leads across the business enterprise. The engine then distributes and monitors leads for follow up across Oracle Marketing, Sales, and Partner solutions. The Leads Management Engine encapsulates lead qualification, and distribution logic using flexible, business-specific rules appropriate to different campaign strategies, regions, products, and customers for each stage of the lead life cycle. All rules are tracked and reported against actual lead lifecycle, enabling optimization of lead quality. Businesses can customize the rules to optimize lead quality and predictability.

Marketing to Partners

Marketers can use Oracle Marketing to provide offers and promotions to their channel partners or a select group of partners for new product launches and inventory clearances. Based on contact preferences, customers can notify the partners about these offers and promotions.

Security

Oracle Marketing has a robust security model for marketing objects that enables a central office to manage all high level programs, but that also enables departments or branches to manage their specific campaigns and activities. Marketers can choose to limit access to one or more marketing initiatives to only those resources who are within a given marketing team by setting a program, campaign, or event to be confidential. However, marketers can choose to give limited access to people outside their teams by setting a marketing initiative to be non-confidential. Security for campaign activities and event schedules is derived from their parent objects. Home page reports also adhere to the team access security model.

Key Benefits

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

Oracle Marketing enables you to accomplish the following:

- **Create and manage demand**

  - Establish and maintain product, service, and brand awareness

  - Track and analyze leads and sales activities

  - Route leads to the "best" channel

- **Improve customer profitability**

  - Understand customer behavior

  - Decrease customer acquisition cost

  - Reduce customer attrition

- **Automate marketing processes**

  - Create and maintain best practices templates

  - Expedite time to market

- **Keep marketing aligned with the overall organization**
  - Align leads, sales, marketing efforts and objectives

  - Distribute marketing information and collateral company wide

  - Provide the marketing team with relevant visibility into other parts of the organization

- **Measure marketing performance**
  - Track spending

  - Provide performance measurements for leads, responses, and revenue

- **Understand the competitive landscape**
  - Provide insight into competitor differentiation

  - Enable price point competition insight

Oracle E-Business Suite Integration Points

Oracle Marketing integrates with the following products:

Oracle Leads Management

Oracle Leads Management enables users to capture, evaluate, and distribute the leads generated by marketing activities for sales follow up. It provides solutions to automate and optimize prospect-to-sales conversion across the enterprise. It provides a staging area for all prospective leads.

Oracle Content Manager

Oracle Marketing leverages Oracle Content Manager's functionality as a central repository of electronic content to be shared across the E-Business Suite of applications. You can create and store content in Oracle Content Manager. This includes internal content used for team collaboration purposes, supporting content for sales and other enterprise users, and external activity content (such as cover letters, attachments, e-mail deliverables, and so on) that will be fulfilled and sent to the customer.

Oracle *i*Store

Oracle Marketing integrates with Oracle *i*Store to enable you to use the Web as a marketing channel and deploy Web Ads, Offers, or product recommendations on the Oracle *i*Store Web site.

Oracle One-to-One Fulfillment

Oracle One-toOne Fulfillment provides E-Business Suite business applications with a centralized mechanism for managing fulfillment. Fulfillment is the process of compiling and distributing information to customers. Oracle One-to-One Fulfillment consists of an application programming interface (API) and a server. The Oracle One-to-One Fulfillment API is used by Oracle Marketing to initiate a request for fulfillment processing. The fulfillment request identifies the content and the server and the Oracle One-to-One Fulfillment server processes the request. It compiles and sends content, such as product literature, proposal templates, welcome letters, and other electronically stored documents to an output device. Output devices include e-mail, fax, and print servers.

Oracle Product Lifecycle Management

Oracle Marketing integrates with Oracle Product Lifecycle Management (PLM) helps marketers define products, product bundles, and product relationships. This information is automatically populated in the product catalog and is available across the E-Business Suite of applications.

By integrating with PLM, Oracle Marketing leverages on PLM's product cataloging and management system. Product cataloging uses the concept of hierarchy, which provides an efficient and re-usable catalog and product management system. The same hierarchy is used across marketing, sales, and reporting to achieve cohesive product-based reporting.

Oracle Sales

Oracle Sales is an application designed for field sales representatives, sales managers, and executives. The application provides a complete set of tools that enables sales teams to manage the sales cycle from beginning to end. It supports the key functions of the sales cycle, with features such as comprehensive customer management, lead and opportunity management, forecasting, quote generation, order placement, and sales methodologies.

When Oracle Marketing integrates with Oracle Sales, the critical link in the Campaign to Cash business flow is fulfilled, providing the information to analyze the success of company campaigns. The integration also enables sales managers to generate and track leads by deploying sales campaign activities from the Campaign Workbench.

Oracle Scripting

The integration between Oracle Marketing and Oracle Scripting provides marketing managers with the ability to follow-up on the campaigns they design with a scripted flow of interactions (either through the Web or a call center). Customers will be able to register for an event online via scripting integration. There are also sample Oracle Scripting scripts that marketers can use to invite customers to participate in surveys (using the Survey components of Scripting) by linking from an e-mail or a Web campaign. The return data from surveys can be used to evaluate customer satisfaction, improve product lines, target new or improved services, or otherwise improve responsiveness.

Scripting is integrated in Oracle Marketing through the use of click-through destinations (CTDs) that can be enabled behind a banner on *i*Store, via an e-mail, or even associated in direct marketing collateral.

Oracle Proposals

Proposal templates are used by marketing activities (in the new Campaign Workbench) as collaboration content. This content is used in the downstream flow of lead management. Sales representatives who are processing the leads use a standard proposal template for a specific activity.

Oracle Data Mining

Data Mining is a process used to discover strong, meaningful patterns and relationships in large amounts of data. Oracle Marketing is integrated out-of-the-box with Oracle Data Mining to build predictive models of customer behavior. Marketers can build models to predict campaign response likelihood, determine product affinity, or predict any user-defined 'target behavior' within a data source. Marketers can then leverage each model's predictions to determine which customers/prospects are most likely to display a particular behavior. This closed-loop process does not require any technical data mining or programming knowledge and can produce significant increases in marketing ROI.

Oracle TeleSales

Oracle TeleSales (OTS) is an application designed for inside sales professionals, inbound telesales agents, or outbound telemarketing agents. OTS offers a multi-channel selling solution that manages leads, opportunities, and forecasts. It provides a set of tools to help the sales team manage the sales cycle - from prospecting for customers to booking the order. When Oracle Marketing and Oracle TeleSales integrate, you can use the Oracle Marketing List Import feature to assign lists to Oracle TeleSales Agents. The agents can then use the Universal Work Queue to access the list of customers assigned to them by the marketing team.

Oracle Web ADI

Web Application Desktop Integrator or Web ADI is a tool that brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. Oracle Marketing too uses Web ADI support to setup campaign activities from the Campaign Workbench.

Oracle Student Services

Oracle Marketing integrates with Oracle Student Services to provide features for the entire recruiting process, from campaign planning, budget management, and list creation to execution, reporting, and analysis. By using a centralized and integrated approach, Oracle Marketing ensures that recruiting activities are on budget and executed in real time through the most effective communication channels.

2

Working in Oracle Marketing

This chapter covers the following topics:

- Users and Responsibilities
- The Campaign Dashboard
- Home Page Calendar
- Understanding User Profiles
- Working with Teams and Approvals
- Working with Common Components

Users and Responsibilities

You can create different users and assign them responsibilities based on their role in Oracle Marketing. The table, Users, Responsibilities, Roles, and Accessible Tabs in Oracle Marketing, page 2-1, lists these details as well as the functionality available to a particular user responsibility in the application.

Users, Responsibilities, Roles, and Accessible Tabs in Oracle Marketing

Responsibility	Role	Functions and Tabs
Marketing User	Marketer, Marketing Manager (Brand Managers, Specific Product Marketing Managers)	All Campaign Workbench functions without the administration access.
Marketing Administrator	Marketing Administrator	All Campaign Workbench functions and administration access.

Responsibility	Role	Functions and Tabs
Audience Super User	• Establishes and manages the internal list selection process for marketing • Manages all lists from affiliates and vendors • Develops and manages processes for data quality of lists • Ensures data enrichment and data integrity of list data	The Audience Administration Dashboard is the home page. Shortcuts available are: • Create Query Template • All Query Templates • Create Data Source • All Data Sources • Fatigue Rules Setup • Audience Workbench • All Suppression Lists • Contact Preferences
List Manager	Creates and manages lists for marketing campaigns and events	The Audience Dashboard is the home page. Shortcuts available are: • Create List • My Lists • Search Lists • Segments • Imports • Discoverer • Organizations • Persons • All Lists • Campaign Workbench

Responsibility	Role	Functions and Tabs
Oracle Marketing Super User		Home tab and sub-tabs, Offers, Event, Deliverable, Budget, Administration, Calendar
Oracle Marketing Administrator	Creates and manages profiles Creates and manages lookups Runs concurrent requests	Oracle Forms Application opens. The following Setups are available: • Profile • Lookups • Concurrent Requests

The Campaign Dashboard

The Campaign Dashboard is the home page for the Campaign Workbench and enables you to perform precampaign analysis and acts as an entry point for the process of planning, creating, and executing Campaign Activities.

Table Elements of the Campaign Dashboard provides brief descriptions of the bins, charts, shortcuts, and links on the Campaign Dashboard.

Elements of the Campaign Dashboard

UI Element	Description
Campaigns Gantt Chart Bin	Lists campaigns along with their timelines. The campaign hierarchy expands to display activities with their timelines. You can select one of the following views: • My Campaigns: Displays all campaigns owned by you with statuses up to Active. • My Team's Campaigns: Displays all campaigns for which you are the owner or are on the team, and with statuses up to Active. • My Team's Active Campaigns: Displays only campaigns with Active status where you are the owner or on the team.
Campaigns Bin	Personalized views of campaigns for which you are the owner or a team member, and have access to financial data for the campaigns. Canceled or archived campaigns are not included unless you search for them. It includes a trend chart for the first five listed campaigns.
Recently Updated Campaigns Bin	Lists the five campaigns for which you are the owner or a team member and have most recently updated header information. The Full Lists button takes you to the Campaigns List.
Activities Bin	Personalized views of campaigns for which you are the owner or a team member, and have access to financial data for the activities. Canceled or archived campaigns are not included unless you search for them.
Recently Updated Activities Bin	Lists the five campaign activities for which you are the owner or a team member and have most recently updated header information. The Full Lists button takes you to the Activities List.
Open Tasks Bin	Displays all of your open tasks sorted by due date.

UI Element	Description
Triggered Monitors Bin	Displays all monitors for initiatives you can access as the owner or a team member, including financial data access. Only monitors in triggered status display. The most recently triggered monitors are on top.
Shortcuts	Contains links that you can click to navigate to perform specific marketing functions. Administrators can add and remove links.

Home Page Calendar

The Oracle Marketing Calendar on the Home Page provides administrative users of a marketing organization with the ability to publish execution objects and their details to all marketing users through the calendar functionality. These objects can be selected for display based on a selection criteria or by manually selecting individual objects to be displayed.

The marketing calendar is set up by the administrator. The administrator decides on the set of objects that will be displayed on the calendars of every user within the organization. However, if you do not wish to view any of the marketing objects set up by the administrator, you can use the user profiles functionality to turn off the views.

Related Topics

For information on setting up the marketing calendar, refer to the *Oracle Marketing Implementation Guide*.

For more information about the JTT Calendar, see the *Oracle Common Application Calendar User Guide.*

Understanding User Profiles

Oracle Marketing has some attributes that you can modify based on your individual preferences. Clicking the Profile link available on most pages displays a profile page where you can set preferences for the various tabs in the application.

Apart from setting preferences for the tabs, you can change your password and specify navigation, display, and calendar preferences.

Access to many of the tabs and dashboard shortcuts is controlled by a responsibility. Each user's responsibility determines the tabs and shortcuts that are displayed and the access rights a user may have. See Section 2.1, "Users and Responsibilities", page 2-1 for information on marketing responsibilities.

Setting General Preferences

Using this functionality, you can set your preferences for how you would like to view and work with the different tabs available in the application. You can also set the country and time zone that will be applicable for you. The preferences you set here will be applicable to the Campaign Workbench, Audience Workbench, and all the tabs in general.

Navigation: Profile > General

Setting Preferences for the Tabs

Using this functionality, you can set your preferences for the individual tabs for the different functionality in the application. You can select a Saved Search to display as the default view for the summary page for the individual tabs in Oracle Marketing.

The navigation varies based on the tab that you choose.

Navigation: Profile >*<tabname>*

Working with Teams and Approvals

Marketing teams associated with marketing objects (campaigns, events, and so on) represent users or a group of users with access privileges to these objects.

When you create a marketing object, you can define it to be confidential to restrict access to the object to the owner and associated team members. You can choose to provide limited read access to initiatives, including higher-level programs, to non-team members by marking those initiatives as not confidential.

To manually add other teams and users to a specific marketing object, navigate to the Access tab associated with the object. To add users to a marketing object, you should either be the owner of a marketing object or a member of its marketing team.

When you add a user to a marketing object (only the object owner and super users can add team members to an object), the user immediately has access to the marketing object. However, if you add a Team to a marketing object, then you need to run the AMS - Team Access Refresh concurrent program to refresh the access privilege for users within the Team. For additional information about the concurrent program, refer to the *Oracle Marketing Implementation Guide*.

Once a team is added to an object, team members gain access to the marketing object. This access can be restricted by using the Financial Access function. If a team does not have access to financial information, its members will be unable to view the associated Budgets, Costs and Revenues, or Metrics navigation links for this object. Marketing team members can have full access (read/write) either with or without the Financial Access (Budgets, Costs and Revenues, and Metrics) for the marketing object. By default, the owner of a marketing object has full access to the marketing object.

Related Topics

Adding Security to a Marketing Object, page 2-7

Overview of Approvals, page 2-7

Using Initiative Approvals, page 2-9

Adding Security to a Marketing Object

The following procedures demonstrate how you can make a campaign confidential and associate teams or individual users to a campaign. You can perform similar procedures for other marketing objects, such as programs or events.

Setting the Confidential Flag

In the Access tab of the Campaign Workbench, you can select to restrict access to a campaign to team members only (confidential). Alternatively, you can select to provide read only access to all marketing users. Until the campaign becomes Active, access to the campaign is restricted to the owner and associated team members only.

Adding a Team or User to a Marketing Object

You can add an individual user or a team of users to a campaign (or other marketing objects) to allow them access to it.

Use the following navigation to add a user or team to a campaign. Similarly, you can add a user or team to other marketing objects.

Navigation: Campaign > Campaigns

Overview of Approvals

Approvals are needed for most objects created in Oracle Marketing (campaigns, campaign activities, events, event activities, one-off events, offers, and deliverables). Objects are approved according to your organization's business rules and approval processes. The administrator sets up the different types of approvals needed for an object as part of the custom setup for the object. For example, the custom setup for a campaign activity may define that only the budget allocated must be approved. Refer *Oracle Marketing Implementation Guide* for more information on setting up approval rules.

There are, primarily, two types of approvals, theme approval and budget approval.

Theme Approval

You may plan a marketing event or campaign around an idea. For example, during the Christmas season, a clothing manufacturer may plan fashion shows in major cities. Once the idea is conceived, it must be approved. In our example, this means that the

theme of having a set of fashion shows is approved. At this stage, you may provide only brief details of the campaign and the costs to be incurred.

Budget Approval

Once the theme has been approved, you will build a detailed plan, also including all the costs involved. For example, the clothing manufacturer in our example will create event activities with details such as the location for the show in each city, the dates for the events, cost and revenue details that must be tracked, and so on.

Once you have planned and entered activity details, you will request funds (budget line requests) to execute these schedules. The budget lines requested must be approved by an approver based on the approval rules setup. After the budget lines are approved, the object itself must be approved based on the approval rules setup. Depending on the approval, the object's status will go to Active or Rejected.

If the object moves into the Rejected status, after modifying its details, you may once again request approval for it.

Approval Requests

If an object needs approval, the Submit for Approval button is displayed on the object details page. You can initiate approvals for the object using the Submit for Approval button. Once you have submitted an object for approval, the Submit for Approval button is rendered as a View Approval button on the details page, which you can use to view the approval status. When the authorized person confirms the approval, the status of the object will move to Active.

There may be times when you need to bypass the approval process for an object. The object will then go from the New status to the Active status directly. If you choose to waive approval for specific marketing activities, you can request your administrator to create a campaign template, activity template, or custom setup (for events) with the theme approval and budget approval waivers defined. You then must click the Activate button on the details page. The object status changes to Active.

Other than the owner, only those users who have financial access can request approval for an object. An owner is automatically assigned financial access for an object.

Previewing Approvals

When you click the Submit for Approval button, you are taken to the Preview Approvals page. If you are the approver, you can view the different details of the object, such as about its request status and budget sources before you confirm the approval. You can also select the status of the object after it has been approved - do you want the object to be Active or Available.

Viewing Approvals

As the owner of an object awaiting approval, you can view the status of the approval before using the object for marketing activities. Clicking on the View Approvals button

will navigate you to the View Approvals page, where you can view the last approval process initiated for the object.

For budget lines (the method in which the money and expense associated with an object is approved) approval, you can view the line level details by clicking the Details icon in the Budget Sources region. A user who does not belong to your team must have financial access to view these details.

Approval Notes

As approvers approve objects in an approval hierarchy, they can maintain notes. These notes are visible to users with financial access to the objects. However, the notes are not direct communication between approver and requestor or between the approvers within a hierarchy. You can access these notes from the View Approval Details page. The note could contain information such as any condition for the approval, the reason for the rejection, and so on.

Using Initiative Approvals

After creating an initiative (for example, a campaign activity), you may need to submit the initiative for various types of approval (depending on the object approval requirements specified by your application administrator in activity and campaign templates).

All approvals in Oracle Marketing happen through the AMS Marketing Workflow process. The logical flow for approvals is as follows:

1. When you create an initiative that needs approval, a Submit for Approval button is displayed. Approvals are initiated when this button is clicked. Users who do not have financial privileges will not be able to view the Submit for Approval button.

2. Clicking the Submit for Approval button takes you to the Preview Approvals page. This page contains details of the approval type (Theme or Budget), request status, budget sources, and approver details. You can modify the request status for the object and select the appropriate user status for the system status that you have selected. Note that your administrator can set user-friendly user statuses corresponding to a system status. For example, you may want the system status Canceled to have the user status Not Available. System statuses are used internally by the system and the corresponding user statuses are displayed when you view the object details.

3. Once the request status is selected, you can click the Confirm button. This initiates the approval process. The status returned upon approval is the request status you selected.

4. The initiative then changes the status to Pending Approval based on the approval initiated. A notification goes to the approver defined in the approval rule. If there is no approval rule defined, the notification for approval goes to the default

marketing approver.

5. When an initiative is pending approval, the View Approval button is displayed on the details page. Clicking it takes you to the View Approval Details page that provides information about the status of the approval and the approver with whom the approval is pending.

6. Depending on what settings the submitter used and on whether the initiative is approved or not, the initiative's status will go to Active, Available, or Rejected. If rejected, you can modify the details of the initiative as necessary and request for a fresh approval. When the status of an object is Active, to change it to any other status you must update it manually.

For objects not requiring approvals, you need to click the Activate button in the object details page to activate the initiative. If the activity is approved, the Activate button is no longer visible. The system performs all the necessary validations for the approval process.

Working with Common Components

This topic covers the following common component information:

- Overview of Notes, page 2-10

- About Attachments, page 2-11

- About Tasks, page 2-11

- Using Calendars, page 2-11

Overview of Notes

You may need to record information about various marketing activities, such as creating campaigns, events, lists, activities, and so on. You can do so using the Notes functionality available across the applications in the Oracle E-Business Suite. A note is descriptive information that you can record and reference later, such as directions, special instructions, or reminders. In Oracle Marketing, you can associate notes to most objects: programs, campaigns, events, activities, deliverables, and so on. When you attach a note to an object, it becomes a part of that object.

The following are the key features of notes:

- Notes are displayed with text, author, and creation date

- You can capture large amounts of text data, up to 32 Kilobytes

For more information on notes, refer *Oracle Common Application Calendar User Guide*.

About Attachments

Attachments are documents, URLs, or text that can be associated with marketing objects in the JTT application. The typical use of attachments is for sharing and storing information about events. For example, you can attach a presentation for an event or the hyperlink for your organization's Web site. When attachments are uploaded to a marketing object, they can be accessed and downloaded by all the team members associated with the marketing activity.

Notes

- **Description:** The description is used to identify the attachment and appears as a hyperlink.

- **URL:** Specify the complete URL, beginning with "http://".

- **Attachment:** For Attachments of type File, you can modify the file directly, and upload the modified file. This will overwrite any previous version.

Related Topics

See "Using Attachments" in the *Oracle Applications User's Guide*

About Tasks

A task is a unit of work for any marketing activity. A task may be a follow-up action, a reminder, or a daily work assignment. Tasks are usually scheduled events and have defined start and end dates. For example, a support manager of a company may create a task for a telemarketing executive stating, "Please call back customer by 9:00am tomorrow".

A task may include information relating to actions such as resources, appointments, references, dates, contacts, recurrences, and events. You must assign a task to an individual or object. You can find tasks in the Collaboration mid tab for campaigns and activities.

For more information on tasks, refer *Oracle Common Application Calendar User Guide*.

Using Calendars

You can view appointments for a campaign on a daily, weekly, or monthly basis on the Oracle Applications Framework calendar.

Notes

- **Show Key** - Click this link to view the specified icons for the Calendar appointments and reminders.

- Tasks also appear on the calendar.

Related Topics

See the *Oracle Applications Calendar User Guide* for more information about the OA Calendar.

3

Oracle Marketing Business User Flows

This chapter covers the following topics:

- Sending Monthly Newsletters to a Set of Customers
- Sending Mailers to a Set of Customers to Promote a Product
- Advertising on the Web to Promote a Product
- Following Up to Responders to an Earlier Activity with a Telemarketing Campaign Activity
- Generating Leads Using a Sales Campaign Activity
- Creating a Media Plan for Advertising an Event
- Improving Campaign Results Using Predictive Analytics

Sending Monthly Newsletters to a Set of Customers

This business user flow describes how you can use the repeating e-mail campaign activity functionality of Oracle Marketing to create, execute, and track the activity of sending a monthly newsletter to a specific set of customers.

Scenario

Vision Enterprises, a manufacturer of computers and computer accessories, sends out a monthly newsletter to selected customers to keep them informed about the latest product information and troubleshooting tips. Each e-mail communication must contain a link to Vision Enterprise's Web site address that customers can click for more detailed information.

Process Flow Diagram

The following figure displays the process flow for the monthly newsletter e-mail campaign activity.

Repeating Campaign Activity Flow
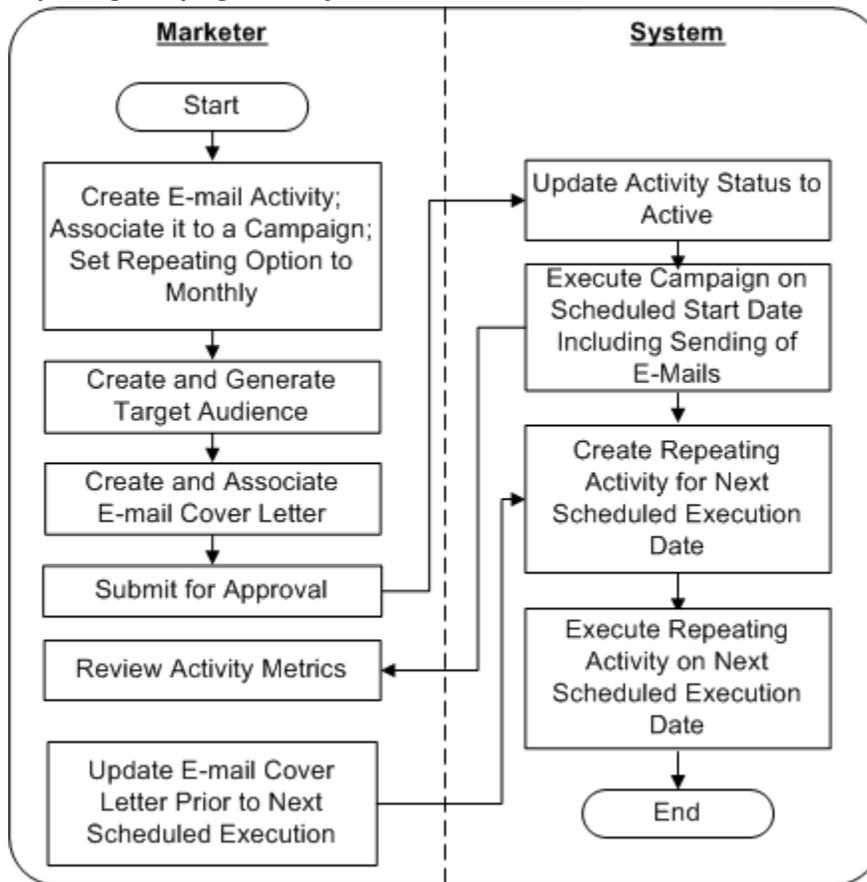
Dependencies and Prerequisites

- Oracle Marketing must be fully implemented

- Integrations with the following must be set up:

- Oracle Content Manager

- Oracle One-to-One Fulfillment

- A campaign must exist

Optionally, for metrics to roll up and be reported at a program level, a program must exist

Steps

Use the steps in this section to complete this flow.

Step 1: Create a Repeating E-mail Campaign Activity

You will create a campaign activity, choosing E-mail as the channel of execution. You must associate this campaign activity to an existing campaign to which it will roll up. For the campaign to roll up to a program, a program must exist and the campaign must be associated with it.

For information on campaigns and programs, see:

- Campaigns Overview, page 8-1

- Creating a Campaign, page 8-4

- Programs Overview, page 7-1

- Creating a Program, page 7-3

The steps involved in creating a repeating e-mail activity are as follows:

Step 1.1: Complete the Mandatory Data for the Campaign Activity

Choose an e-mail campaign activity template to create this campaign activity. Selection of this template enables a set of attributes which must be completed.

Step 1.2: Set the Frequency at Which the Activity Must Repeat

For the newsletter to be sent to customers every month, you must set frequency at which the e-mail campaign activity repeats.

Step 1.3: Complete the Optional Setup for the Activity

You can optionally associate products or offers, collaboration material, notes, tracking metrics, and other additional information to the campaign activity.

For information on how to include optional setup data, see:

- Associating a Product or Offer, page 13-8

- Associating Costs, Revenues, and Metrics for Tracking, page 11-35

Step 1.4: Create Newsletter Content and Corresponding Cover Letter and Associate them to the Activity

The e-mail cover letter is the newsletter that will go to the target customers. You can (optionally) include a click-through destination (CTD) in the cover letter that the customers can click to navigate to Vision Enterprise's Web site.

Step 1.5: Prepare a List of Customers to Send the Newsletter to

You can specify the audience to whom to send the newsletter. You do so by creating a target group using list templates or based on existing lists, segments, workbooks, or

custom SQL. Note that the activity repeats to this list each time it executes.

Optionally, you can choose to apply fatigue rules for the activity. You can view fatigue reports to know how many customers are fatigued and how many available to target.

For information on how to create and associate a target group, see Creating and Associating Target Groups, page 11-20

For information on fatigue rules, see:

• Understanding and Using Fatigue Rules, page 11-15

• Viewing an Activity or Channel Specific Fatigue Report, page 11-39

Refer *Oracle Marketing Implementation Guide* to know how to create fatigue rules.

Step 2: Submit the Campaign Activity for Approval

When you have completed the various details for the campaign activity, you can submit it for approval. The approval goes through the Workflow process, and when a campaign activity is approved it moves to the Active status.

To know more about Approvals, see Approvals Overview, page 2-7.

When the campaign activity is automatically activated by the Repeating Trigger, e-mail is sent to all the customers in the target group using the live version of the cover letter.

The target group is evaluated for suppressed and fatigued customers before the e-mail is sent out.

Step 3: Update the Cover Letter in Oracle Content Manager

You can update the cover letter (the newsletter that was sent by the e-mail activity) in Oracle Content Manager and keep the next version ready for circulation the following month. When the campaign activity executes the following month, the latest live version of the newsletter is picked up and sent to the target group.

Refer *Oracle Content Manager Implementation and Administration Guide* for information on updating cover letters.

Sending Mailers to a Set of Customers to Promote a Product

This business user flow describes how to use the direct mail print campaign activity functionality of Oracle Marketing to create, execute, and track an activity to send mailers to a set of customers to promote a new product.

Dependencies and Prerequisites

Oracle Marketing must be fully implemented

Integrations with the following must be set up:

- Oracle Content Manager

- Oracle One-to-One Fulfillment

- A campaign must exist

Optionally, for metrics to rollup and be reported at the program level, a program must exist.

Scenario

Vision Enterprises, a manufacturer of computers and computer accessories, wants to send a direct print mail communication to its customers who purchased its computers in the last month. The mailer includes a URL for the customers to visit the product details information on the company website, where the customers can go for additional information. Since this web site also lists the products to up sell for the computer, the marketing manager wants to track who visited that URL, and view reports for these visits. The marketing manager also wishes to view the fatigue reports to know the number of customers fatigued.

Process Flow Diagram

The following figure depicts the process flow for a direct mail print campaign activity.

Process Flow for a Direct Mail Print Campaign Activity
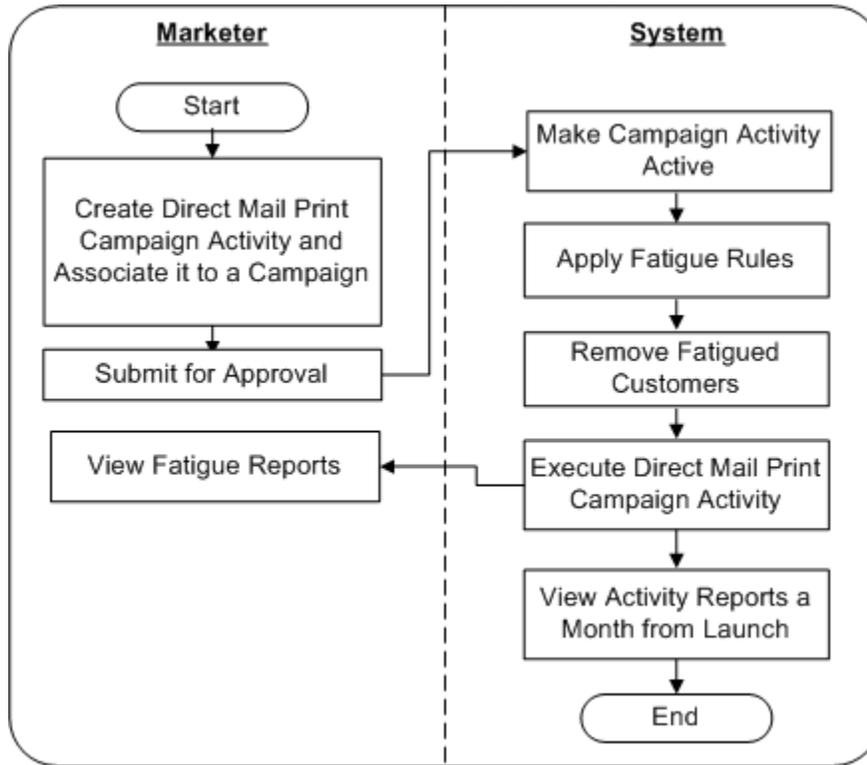
Steps

Use the steps in this section to complete this flow.

Step 1: Create a Direct Mail Print Campaign Activity

You will create a campaign activity, choosing Print as the channel of execution. You must associate this campaign activity to an existing campaign to which it can roll up. Additionally, for the campaign to roll up to a program, ensure that the program exists and the campaign is associated with it.

For information on campaigns and programs, see:

- Campaigns Overview, page 8-1

- Creating a Campaign, page 8-4

- Programs Overview, page 7-1

- Creating a Program, page 7-3

The steps involved in creating a print campaign activity are as follows:

Step 1.1: Complete the Mandatory Data for the Campaign Activity

Choose the Direct Mail - Print campaign activity template to create this campaign schedule. Selection of this template enables a set of attributes which must be completed.

Step 1.2: Complete the Optional Setup For the Campaign Activity

You can optionally associate products or offers, collaboration material, notes, tracking metrics, and other additional information to the campaign activity.

For information on how to include optional setup data, see:

- Associating a Product or Offer, page 13-8

- Associating Costs, Revenues, and Metrics for Tracking, page 11-35

Step 1.3: Create Mailer Content and Corresponding Cover Letter and Associate them to the Activity

The print cover letter is the mailer that will go to the target customers. You can select the mailer from Oracle Content Manager (OCM) repository or create it and submit it for approval. When approved, it is available to be used by the campaign activity. You must have the necessary folder permissions to create and store content in OCM. Refer *Oracle Content Manager Implementation and Administration Guide* for information on folder permissions.

You may also generate the recipient information for the members of the target group, and download and use the resulting .csv file to print labels using external programs.

Step 1.4: Define Response Tracking URL for the Web Landing Page URL Included in the Mailer

Include in the mailer the additional product details URL for the customers to visit. You must define a Response Tracking URL in the Collateral Mid Tab and register the Web Landing Page URL published in the mailer with this campaign activity. Your administrator defines a web page for product details. Specify the URL to that Product Details Page as the Redirect URL (Go To URL) for the published Landing Page URL. The Marketing Application generates a Click Through Tracking URL. Your administrator must configure this redirection by correlating the published Web Landing Page URL and the Click Through Tracking URL generated by the Marketing Application. See the *Oracle Marketing Implementation Guide* for details.

Step 1.5: Prepare a List of Customers to Send the Mailer to

You can specify the audience to whom to send the mailer. You do so by creating a target group using list templates or based on existing lists, segments, workbooks, or custom SQL. Optionally, you can choose to apply fatigue rules for the activity. You can view fatigue reports to know how many customers are fatigued and how many available to target.

For information on how to create and associate a target group, see Creating and

Associating Target Groups, page 11-20

For information on fatigue rules, see:

- Understanding and Using Fatigue Rules, page 11-15

- Viewing a Schedule or Channel Specific Fatigue Report, page 11-39

Refer *Oracle Marketing Implementation Guide* to know how to create fatigue rules.

Step 2: Submit the Activity for Approval

When you have completed the various details for the campaign activity, you can submit it for approval. The approval goes through the Workflow process, and when a campaign activity is approved it moves to the Active status.

To know more about Approvals, see Approvals Overview, page 2-7.

When the campaign activity is approved and active, mailers are printed and sent to all the customers in the target group.

The target group is evaluated for suppressed and fatigued customers before the mailers are sent out.

Step 3: Review Landing Page URL Responses

After the mailer activity is launched, go to the report for the campaign activity and review how many customers visited the Web Landing Page to review product details. You can then target these customers for up sell activities.

Advertising on the Web to Promote a Product

This business user flow describes how you can use the Web marketing functionality of Oracle Marketing to create and execute a Web Ad.

Dependencies and Prerequisites

- Oracle Marketing must be fully implemented

- Integration with Oracle *i*Store and Oracle Content Manager must be set up

- The Product page for the product you are promoting must be set up in *i*Store

- A campaign must exist

- Optionally, for metrics to rollup and be reported at the program level, a program must exist

Scenario

Vision Enterprises, a manufacturer of computers and computer accessories, wants to promote its new sleek monitors on Vision *i*Store's Home page. When Web visitors click on the Ad, they will be brought to the product page for the monitors.

Process Flow Diagram

The following figure depicts the process flow for creating and executing a Web ad.

Process Flow for Creating and Executing a Web Ad
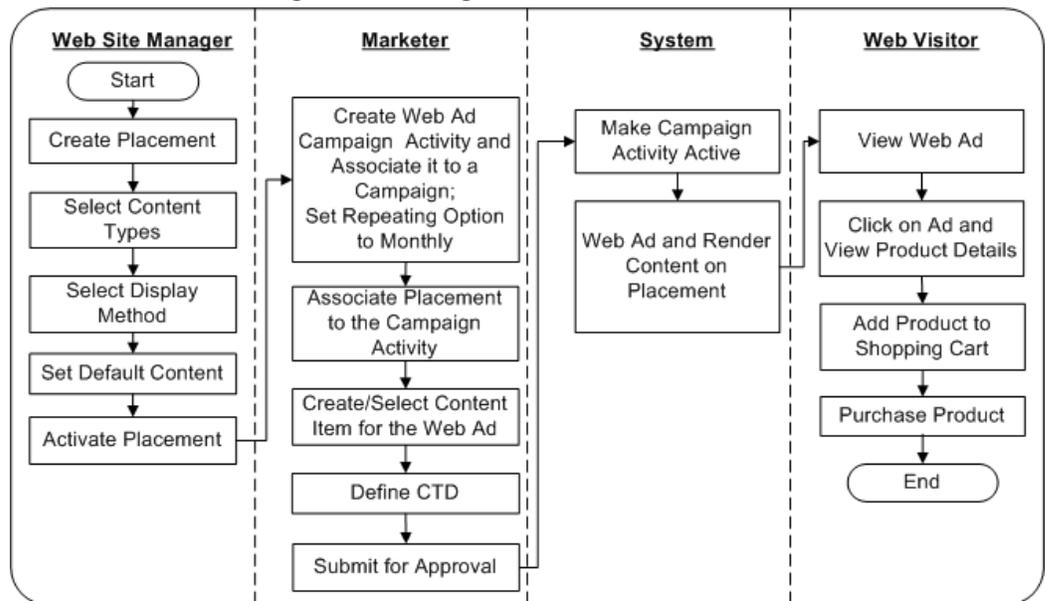
Steps

Use the steps in this section to complete this flow.

Step 1: Specify the Location on the Web Site Where the Ad Must be Displayed

As the Web site manager (who could well be the marketer, too), you will define and activate the location where the Web Ad will be rendered when the Web Advertising Acttivity becomes active and executes. You can select the content types, the display method, and the default content for a placement.

Step 2: Create a Web Ad Campaign Activity

As a marketer, you will create a campaign activity using the Web channel. You must associate this campaign activity to an existing campaign to which it can roll up. Additionally, for the campaign to roll up to a program, ensure that the program exists

and the campaign is associated with it.

For information on campaigns and programs, see:

- Campaigns Overview, page 8-1

- Creating a Campaign, page 8-4

- Programs Overview, page 7-1

- Creating a Program, page 7-3

The steps involved in creating a Web Ad campaign activity are as follows:

Step 2.1: Complete the Mandatory Data for the Campaign Activity

Choose the Web Advertising campaign activity template to create this campaign activity. Selection of this template enables a set of attributes which must be completed.

For information on entering mandatory data, see Entering Basic Details, page 13-8.

Step 2.2: Complete the Optional Setup For the Activity

You can optionally associate a specific audience, notes, metrics that you want to track, and other additional information to the campaign activity.

For information on how to include optional setup data, see:

- Creating and Associating Target Groups, page 11-20

- Associating Costs, Revenues, and Metrics for Tracking, page 11-35

Step 2.3: Select the Product that you Want to Promote in the Web Ad

In this step you will associate the sleek monitors (Offering) that you wish to promote through the Web Ad. Only products that have been associated to the parent campaign are available to be associated with the Web Ad campaign activity.

See Associating a Product or Offer, page 11-11 for information on how to associate a product.

Step 2.4: Specify the Web Site Location Where the Ad Will be Displayed and Select Content to Display

In this step, you will specify the placement to which this activity must render content and the content item that must be displayed. Because Oracle Marketing integrates with Oracle Content Manager (OCM), OCM content types determine what and how content will be rendered in a placement. Content types have one or more stylesheets associated with them, which define how the content type is actually displayed in a Placement.

If you have the necessary access permissions to OCM folders, you can create the content item and submit it for approval. Content must be approved before it can be rendered.

Refer to the *Oracle Content Manager Implementation and Administration Guide* for information on folder permissions.

See Associating a Web Ad or Web Offer to a Placement, page 13-8 for information on associating a Web activity to a placement.

Step 2.5: Specify the Action for the Click-Through Destination

In this step, you will enable the visitor to go to the product page directly and get more details for the monitors. Alternatively, you could have enabled the visitor to add the product immediately to the shopping cart. You do so by defining a CTD for the content item and selecting an action for the CTD. Actions available include:

- Go to URL

- Go to iStore Registration Page

- Go to Minisite

- Go to Section Details

- Go to Product Details

- Go to Shopping Cart

- Go to Shopping Cart with an Item

- Go to Web Script

- Go to Content Item

For information on creating click-through destinations, see Associating a Web Ad or Web Offer to a Placement, page 13-8.

Step 3: Submit the Activity for Approval

When the Web Ad Activity is approved and active, it can be executed and its content rendered in the selected Placements. Note that this does not mean that this activity will actually run. It only means that this activity is eligible to run. Whether it actually runs or not will depend on other conditions like what the selection method is for the Placements associated with the Activity, if there are other higher priority activities using the same Placement, and so on.

In this scenario, it is assumed that the Web Ad schedule that was just created is the only Web Ad activity using the associated Placement.

To know more about Approvals, see Approvals Overview, page 2-7.

Step 4: Verify if the Web Ad is Displayed on the Web Site

If you log into the *i*Store Web site, you should see the advertisement in the specified location.

Following Up to Responders to an Earlier Activity with a Telemarketing Campaign Activity

This business user flow describes how to use Oracle Marketing to create and execute a telemarketing campaign. You will use the Campaign Workbench to complete the flow.

Dependencies and Prerequisites

- Oracle Marketing must be fully implemented

- Integrations with Oracle Content Manager and Oracle TeleSales must be set up

- A campaign must exist

- Optionally, for metrics to rollup and be reported at the program level, a program must exist

Setup Needed for this Scenario

Integration with Oracle Scripting must be set up

The data sheet for the product being promoted must be available

Scenario

Vision Enterprises wants to execute a Telemarketing follow up activity for customers who responded to an earlier e-mail activity to promote their new sleek monitors. The product data sheet that must go out to the telesales agents must be included.

Process Flow Diagram

The following figure depicts the process flow for creating and executing a telemarketing campaign activity.

Process Flow for Creating and Executing a Telemarketing Campaign Activity
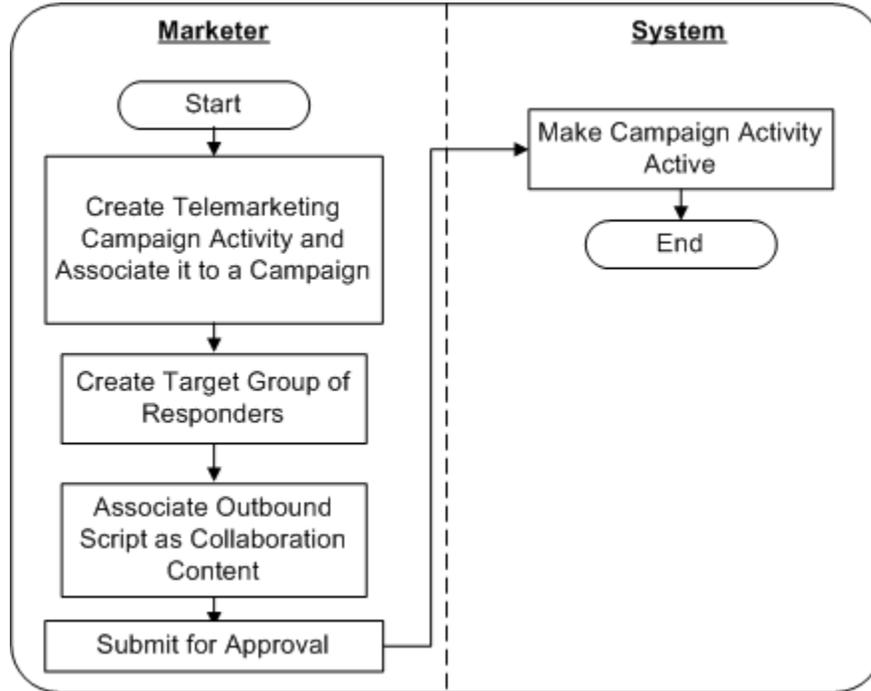
Steps

Use the steps in this section to complete this flow.

Step 1: Create a Telemarketing Campaign Activity

You will create a campaign activity, choosing Telemarketing as the channel of execution. You must associate this campaign activity to an existing campaign to which it can roll up. Additionally, for the campaign to roll up to a program, ensure that the program exists and the campaign is associated with it.

For information on campaigns and programs, see:

- Campaigns Overview, page 8-1

- Creating a Campaign, page 8-4

- Programs Overview, page 7-1

- Creating a Program, page 7-3

The steps involved in creating a print campaign schedule are as follows:

Step 1.1: Complete the Mandatory Data for the Campaign Activity

Choose the Telemarketing campaign activity template to create this campaign activity. Selection of this template enables a set of attributes which must be completed.

Step 1.2: Complete the Optional Setup For the Activity

You can optionally associate products or offers, notes, tracking metrics, and other additional information to the campaign activity.

For information on how to include optional setup data, see:

- Associating a Product or Offer, page 13-8

- Associating Costs, Revenues, and Metrics for Tracking, page 11-35

Step 1.3: Prepare a List of Customers who Responded to an Earlier Activity

You can specify the audience which the telemarketing agents must contact. You do so by creating a target group using list templates or based on existing lists, segments, workbooks, or custom SQL. Optionally, you can choose to apply fatigue rules for the activity. You can view fatigue reports to know how many customers are fatigued and how many available to target.

In this scenario, you will create the target group of respondents to an earlier e-mail campaign activity by using seeded list templates (Interaction Follow Up - B2B or Interaction Follow Up - B2C).

For information on how to create and associate a target group using seeded list templates, see Creating and Associating Target Groups, page 11-20

For information on fatigue rules, see:

- Understanding and Using Fatigue Rules, page 11-15

- Viewing a Schedule or Channel Specific Fatigue Report, page 11-39

Refer *Oracle Marketing Implementation Guide* to know how to create fatigue rules.

Step 1.4: Associate the Data Sheet for the Product as Collaboration Content

In this step, you will associate the product data sheet as an outbound script that must reach the telemarketing agents.

Scripts are usually used to guide agents in their interactions with customers or prospects. This reduces agent training time and ensures that consistent corporate messages are communicated to customers and prospects. Scripts are also used to poll target audiences, receive and analyze responses, and take action based on the compiled survey data. Scripts are created in Oracle Scripting.

Step 2: Submit the Campaign Activity for Approval

When you have completed the various details for the campaign activity, you can submit it for approval. The approval goes through the Workflow process, and when a campaign activity is approved it moves to the Active status.

When the campaign activity is approved and active, the proposal template and the list of customers is sent out to the telemarketing agents.

The target group is evaluated for suppressed and fatigued customers before the activity executes.

To know more about Approvals, see Approvals Overview, page 2-7.

Generating Leads Using a Sales Campaign Activity

This business user flow describes how sales managers can use the Sales Campaign Activity functionality of Oracle Marketing to generate leads from their install base.

Dependencies and Prerequisites

- Oracle Marketing must be fully implemented

- Integration with Oracle Content Manager must be set up

- A campaign must exist

- Optionally, for metrics to rollup and be reported at the program level, a program must exist

Setup Needed for this Scenario

- Integration with Oracle Proposals must be set up

- A proposal template must be available

Scenario

The sales manager of Vision Enterprises plans to generate top quality leads from Vision's install base. The sales team will receive the proposals and sales material it needs to aid training and to follow up the leads generated.

Process Flow Diagram

The following figure depicts the process flow for creating and executing a sales campaign.

Process Flow for Creating and Executing a Sales Campaign
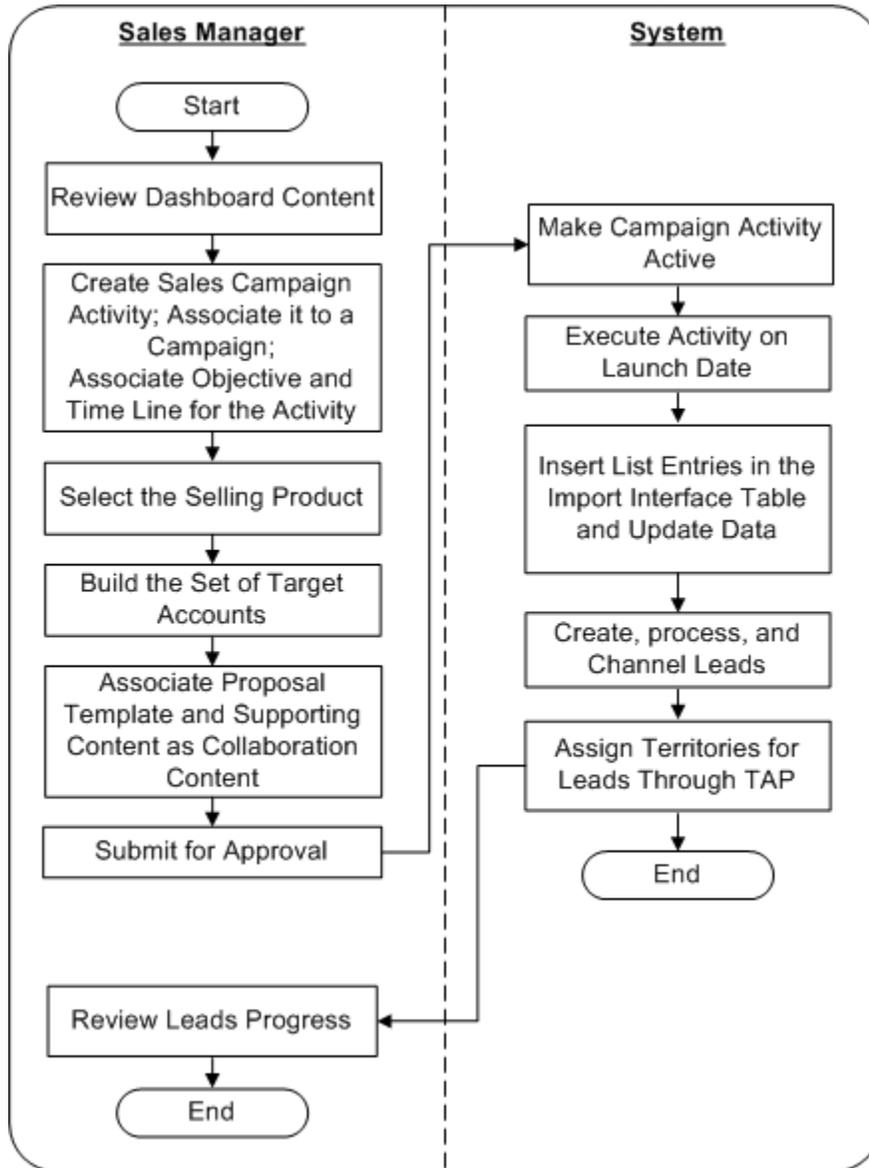
Steps

Use the steps in this section to complete this flow.

Step 1: Review the Sales Dashboard

Using the Sales Funnel, Latest Forecast, Top Customers, Top Opportunities, and the Cross Sell/Up Sell Sales Campaigns regions of the Sales Dashboard, you can make decisions for the what, why, and when of a new sales blitz.

Refer the *Oracle Sales User Guide* for more details on the dashboard.

Step 2: Create a Sales Campaign Activity

You will create a campaign activity, choosing Sales as the channel of execution. You must associate this campaign activity to an existing campaign to which it can roll up to. This allows Oracle Marketing to track the overall success of this effort as part of larger enterprise marketing activities.

Additionally, for the campaign to roll up to a program, ensure that the program exists and the campaign is associated with it.

For information on campaigns and programs, see:

- Campaigns Overview, page 8-1

- Creating a Campaign, page 8-4

- Programs Overview, page 7-1

- Creating a Program, page 7-3

The steps involved in creating a Sales campaign activity are as follows:

Step 2.1: Complete the Mandatory Data for the Campaign Activity

Choose the Sales campaign activity template to create this campaign activity. Selection of this template enables a set of attributes which must be completed. You will define the launch date, the methodology, and the objective for the sales campaign.

Step 2.2: Select the Selling Product for the Activity

You will define the target product being cross sold or up sold for the sales effort. this product will be the product used to generate the sales leads. The product selected also drives the content for the sales training.

For information on how to select a product, see Associating a Product or Offer, page 13-8.

Step 2.3: Complete the Optional Setup for the Activity

You can optionally associate notes, tracking metrics, and other additional information to the sales campaign activity.

For information on how to include optional setup data, see:

- Associating Costs, Revenues, and Metrics for Tracking, page 11-35

Step 2.4: Prepare the List of Customers that the Activity Must Target

You can define the set of accounts against which leads will be generated for sales follow

up. You can do so by creating a target group using list templates or based on existing lists, segments, workbooks, or custom SQL. List templates are based on the sales effort purpose - for example, to cross sell to the install base for the selected sales group. This functionality is leveraged from Oracle Marketing's Audience Workbench.

After defining the target group, you can generate the target list and view its entries.

For information on how to create and associate a target group, see Creating and Associating Target Groups, page 11-20

Step 2.5: Select and Associate a Proposal Template

In this step, you will associate the proposal template for the leads for this campaign. Sales representatives can use templates to generate and fulfill proposals for the sales campaign activity leads. The proposal template is created in Oracle Proposals and is associated as collaboration content.

Step 2.5: Select and Associate Content to aid Sales Training/Collaboration

Here you define the content for the sales effort. This content will be made available to the sales representatives as read-only content to help train on the product strategy and cross sell opportunity while working on the leads.

Content items can be selected from the Oracle Content Manager (OCM) repository. You may also create the content if you have the necessary access permissions for OCM folders.

Refer *Oracle Content Manager Implementation and Administration Guide* for information on folder permissions.

Step 3: Submit the Campaign Activity for Approval and Return to the Sales Dashboard

When you have completed the various details for the campaign activity, you can submit it for approval. The approval goes through the Workflow process, and when the campaign activity is approved, it moves to the Active status.

Read only access is provided to the sales representatives for content associated with leads assigned to them. The read-only page also provides information about the target product, install base criteria for the leads, and objective information provided by the manager.

To know more about Approvals, see Approvals Overview, page 2-7.

Step 4: Review the Leads Generated from the Sales Campaign

Leads for the sales campaign are set to be scored as 'A' leads to ensure they are prioritized in the workload for the sales representative queue. All leads are channeled to Direct to call Territory Manager to be assigned to sales representatives.

Refer the *Oracle Sales User Guide* for more details.

Creating a Media Plan for Advertising an Event

This business user flow describes how you can use the integration of Oracle Marketing with Web ADI functionality to plan and create a media plan to deploy a large number of activities to advertise an upcoming event. the flow will also describe how an advertisement can be placed on third party Web sites.

Scenario

Vision Peripherals plans to conduct road shows to promote its new laser printers. The marketing department wants to advertise the event and elicit online event registrations.

Advertisements will be displayed on billboards and deployed via TV and radio. Web Ads will be deployed on third party Web sites, such as Yahoo and CNN using Web activities. Web Ads on the company Web site will invite prospects and customers to register for the event online. Clicks on the third party Web sites will also lead visitors to the company Web site for online registration.

In all, 50 campaign activities must be created.

Process Flow Diagram

The following figure displays the process flow for creating a large number of campaign activities using Web ADI and importing them into the Oracle Marketing Application.
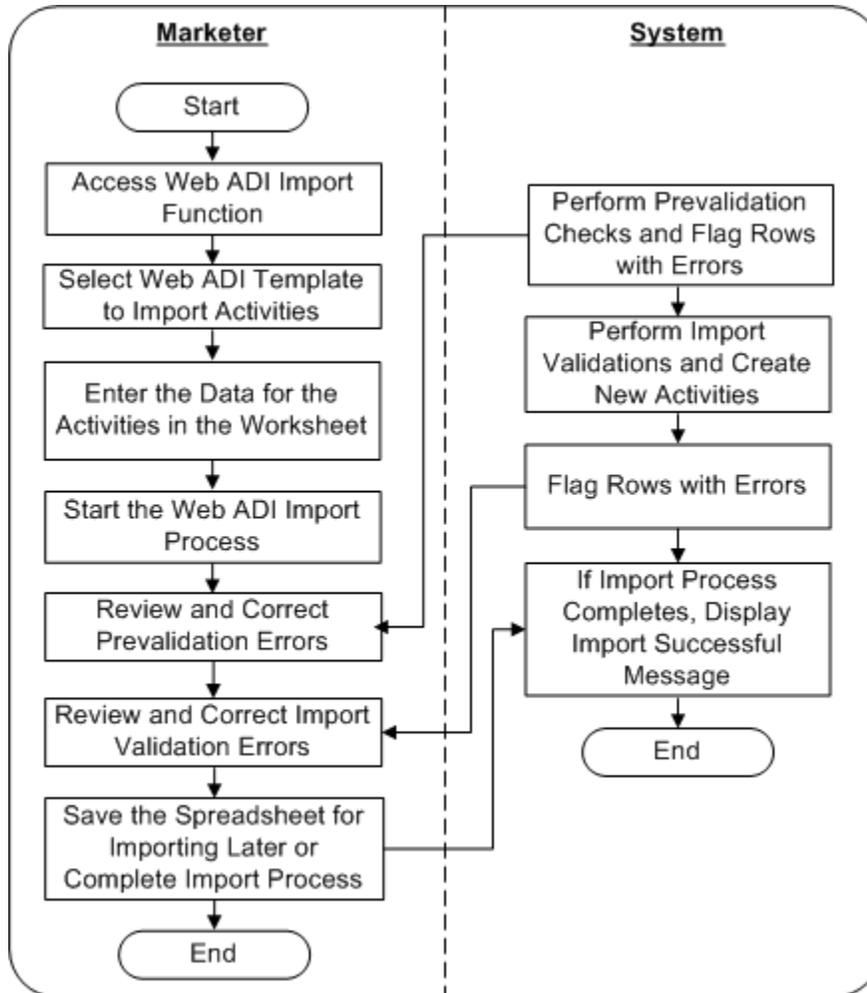
Dependencies and Prerequisites

- Oracle Marketing must be fully implemented

- Integrations with the following must be set up:

    - Oracle Content Manager

    - Oracle One-to-One Fulfillment

    - Oracle Web ADI

- A campaign must exist

- Optionally, for metrics to roll up and be reported at a program level, a program must exist

Steps

Use the steps in this section to complete this flow.

Step 1: Start the Web ADI Import Process to Create New Activities

You will choose the Activities Import layout in the Activities List page on the Campaign Workbench and select a suitable spreadsheet layout. You must associate each campaign activity to an existing campaign. All the campaign activity metrics will roll up to this campaign. For the campaigns to roll up to programs, the programs must exist, and each campaign must be associated with a relevant program.

For information on campaigns and programs, see:

- Campaigns Overview, page 8-1

- Creating a Campaign, page 8-4

- Programs Overview, page 7-1

- Creating a Program, page 7-3

Step 2: Enter Basic Campaign Activity Details in the Spreadsheet

Enter the details for the campaign activities in the relevant columns of the selected spreadsheet layout. Select any collateral and the script for inviting event registrations.

For general information on campaign activities, see:

- Understanding Campaign Activities, page 11-1

For detailed information on using Web ADI layouts for importing campaign activities, see:

- Web ADI Overview , page 22-1

- Web ADI Layouts, page 22-2

- Prerequisites for Using Web ADI, page 22-4

- General Guidelines for Using Web ADI Layouts, page 22-4

- The Web ADI Import Process, page 22-5

- Creating Campaign Activities Using the Import Process, page 22-7

Step 3: Enter Landing Page URL Details for Soliciting Responses

For advertising activities, where needed, specify the Landing Page URL details.

After creating the spreadsheet, complete the Import process to get the schedules data into the application.

Step 4: Send Content and Tracking URL for Deployment on Third Party Web Sites

For Web Ads to be displayed on third party Web sites, you must manually send the content (mostly images) and the associated click through tracking URL to the relevant third parties. The third party will serve this banner on their Web site and associate the click through tracking URL to it.

Improving Campaign Results Using Predictive Analytics

This business user flow describes how to use Oracle Marketing to build and evaluate a predictive model and use the model's results to generate a target list for a campaign activity.

Dependencies and Prerequisites

- Oracle Marketing must be fully implemented

- Oracle Data Mining 10g Release 2 or higher must be installed

Scenario

Vision Enterprise plans to launch a new product, Vision Wireless Laptop, into the market. The Vision marketing group expects that existing laptop customers are good candidates for a campaign to promote the new product. However, Vision would like to cut its marketing costs for this campaign. Instead of targeting all laptop customers, Vision plans to intelligently target only those customers who are most likely to respond to the marketing campaign. This will help Vision ensure a better return on investment.

Process Flow Diagram

The following figure depicts the process flow for a predictive response model.

Process Flow for Predictive Campaign Response Model
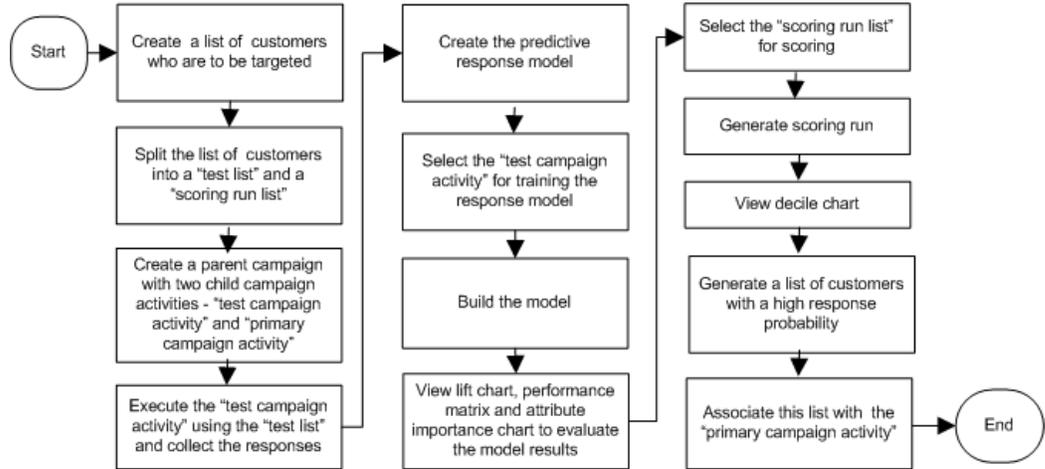
Steps

Use the steps in this section to complete this flow.

Step 1: Identify Target Customers

In this step, you will create a list of all existing laptop customers and split this list into the following two lists:

A 'test list' based on a random subset, for example 5%, of the original listA 'scoring run list' with the rest of the customers

For the procedures on creating a list of target customers, see Creating a List Using Natural Language Query, page 4-8.

Step 2: Create and Execute a Test Campaign Activity

In this step, you will perform the following:

- Create a parent campaign with two child campaign activities - "test campaign activity" and "primary campaign activity"

- Attach the "test list" to the "test campaign activity"

- Execute the "test campaign activity" and collect the responses (captured within Interaction History)

For the procedures on creating a campaign and campaign activities, see Creating a Campaign, page 8-4.

Step 3: Create and Build a Campaign Response Model

A predictive model is a set of rules that can be used to determine the value of a specific customer attribute (for example, response to a campaign) based on the known values of other attributes.

In this step, you will:

Create a campaign response model

Use the "test campaign activity" as training data for this model

Preview the data used for this response model

Build the model

For the procedures on creating and building a model, see:

- Creating the Model, page 5-17

- Selecting Training Data For Response Models Using Seeded Data Sources, page 5-18

- Scheduling a Build for a Model, page 5-23

Step 4: Evaluate the Model Results

When a predictive model is built, the model's results are available as:

- Lift Chart - that shows how well the model is expected to perform, that is, the benefit of Intelligent Targeting Vs. Random Targeting

- Performance Matrix - that provides statistical insight into the accuracy of the Model

- Attribute Importance Report - that shows the customer attributes that have the greatest impact on response probability

By evaluating this information, you can determine the accuracy of the model and make adjustments to the training data to enhance the performance and predictive power of the model.

For more information on model build results and how to evaluate the build, see:

- Evaluating Model Build Results, page 5-11

- Viewing Build Results, page 5-23

- Improving Model Results, page 5-16

Step 5: Create and Score a Target Population

Scoring is the process of using a predictive model to determine the future behavior of a

target population. During the scoring run, each customer record in the target population is assigned a probability score. This score indicates the likelihood that the customer will exhibit the target behavior. For example, respond to a marketing campaign.

In this step, you will:

- Create a scoring run

- Identify the "scoring run list" for the scoring run selection

- Generate the scoring run

See Generating a Scoring Run, page 5-28 for the procedures to complete the generation of a scoring run and generate a list.

Step 6: View Scoring Run Results

The scoring run result is divided into ten continuous deciles. Each decile has an associated percentage range (for example 80-90%) that indicates the likelihood that the customers within this range will exhibit the target behavior.

For the procedure to view scoring run results, see Viewing Scoring Run Results, page 5-31.

Step 7: Generate a List and Associate it to a Campaign Activity

The scoring run results helps you narrow your target population by selecting only those customers with a high likelihood to exhibit the "target behavior"

- Select the top customer deciles to be included in the list

- Generate this list of customers

- Associate this list to the "primary campaign activity"

By intelligently targeting only those customers with a high propensity to exhibit the target behavior, you can increase Marketing ROI by decreasing the number of contacts and increasing the response rate.

For the procedure on generating a list and associating it to a campaign activity, see Generating a List Based on Decile Scores, page 5-33.

4

Creating and Managing Audiences

This chapter covers the following topics:

- Managing Audiences

- Overview of the Audience Dashboard

- Creating a List Using Natural Language Query

- Creating a List Using Parameterized SQL

- Creating Lists Using Advanced Methods

- Creating a List using the Advanced Method

- Creating Lists Using Discoverer

- Creating a Custom SQL

- Generating Lists

- Adding Manual List Entries

- Managing Lists

- Creating and Managing Segments

- Creating and Managing List Imports

- Importing a List Using the List Import Wizard

- Handling List Import Errors

- Viewing Organization and Person Information

Managing Audiences

An audience, in marketing terms, is a group of people who can be targeted for a campaign or an event. They meet a common criteria, and can be addressed for a specific purpose such as customer retention, cross-sell, or the launch of a new product.

In Oracle Marketing, you will use the Audience Workbench to work with and manage

lists for your marketing activities. From the Audience Workbench, tasks for audience management (commonly known as list management), includes:

- Working with Lists, Segments, Workbooks, SQL queries, and List Imports using the Audience Workbench.

- Creating and managing Person (B2C) and Organization (B2B) records using the Person and Organization tabs.

Working with Audience Objects

There are several objects that you will use when you work with audiences in the Audience Workbench. This section gives you a brief overview on each of them.

Lists

A list is a group of customers or prospects who meet specific user-defined criteria. A list is always static. For example, from a given database, a list is created on 12-December-2003 consisting of high income customers with kids living in San Francisco. The list contains 1000 records. On 13-December-2003, there are 50 additions to the high income category of customers in the database. However the list, being static, continues to hold only the original 1000 entries.

List Templates

A list template is a set of conditions that has been defined by the administrator for the purpose of creating a list. Two types of list templates are available: the Natural Language Query (NLQ) template and the Parameterized SQL template. The NLQ template allows you to specify the query conditions in a format that is similar to the way you speak or converse. The Parameterized SQL template displays query conditions as a list of parameters whose values you can enter directly.

Segments

Segments are groupings of customers satisfying strategic or tactical business rules or criteria. A segment is dynamic. For example, if a segment is associated with a target group in a campaign schedule, those customers meeting the segment criteria will be included in the list at the time of generation. Therefore, a segment always reflects the latest data in the database. For example, from a given database, a Segment is created on 12-December-2003 consisting of high income customers with kids living in San Francisco. The Segment contains 1000 records. On 13-December-2003, there are 50 additions to the high income category of customers in the database. The Segment now contains 1050 records.

Workbooks

Workbooks are created within Oracle Discoverer and contain user-defined selection criteria for customers/prospects. A workbook can have a single or multiple worksheets. A worksheet can be used as criteria for the generation of a list.

SQL

You can use Structured Query Language (SQL) as another method to store specific criteria that you can dynamically use to create a list.

List Import

This is the process used to import external data, such as a purchased or rented prospect list, into the Oracle Customer Model (TCA).

Target Groups

A Target Group is associated with campaign activities to specify the customers or prospects to target. You can define a target group based on list templates, lists, segments, workbooks, or SQL.

Person

A person is an individual consumer that your business interacts directly with.

Organization

An organization is a business or company.

Organization Contact

An organization contact is a person who acts on behalf of or in the context of an organization.

Overview of the Audience Dashboard

The Audience Dashboard is the home page of the Audience Workbench for users with an Audience User responsibility. On the dashboard, you can monitor the performance and metric trends of your lists, view the distribution of lists across the various purposes, and quickly navigate to other functionalities such as creating or updating a list. The functional flow for the tasks that a marketer can perform from the Audience Dashboard is as follows:

- Search for lists. See Personalizing Views in the Audience and Campaign Workbenches, page 6-2 for details on the Search functionality provided in Oracle Marketing.

- Monitor the effectiveness of your lists such as top or bottom performing lists

- Examine metric trends for your lists

- View your list distribution by purpose and most recently updated lists

- Use shortcuts to navigate to the Campaign Workbench (depending on your responsibility)

- Create, delete, copy, split, merge, or modify lists

The Audience Dashboard contains five main bins: List Effectiveness Report, List Metric Trend Chart, Active Lists by Purpose, My Recent Lists, and Shortcuts.

Topics in this section include:

- List Effectiveness Report, page 4-4

- List Metric Trend Chart, page 4-5

- Active Lists by Purpose, page 4-6

- My Recent Lists, page 4-6

- Shortcuts, page 4-6

- Related Links, page 4-7

List Effectiveness Report

The information displayed within this bin is based on the view selected. The lists appearing are associated with the target groups of active campaign activities. The Top and Bottom Performing Lists are out-of-the-box views. These two views are based on the number of leads the list has generated over the period of time specified in the view. The top performing lists will be displayed by default.

The list effectiveness is measured based upon the following metrics:

- Responses

- Leads

- Opportunities

- Booked Order Count

- Booked Order Amount

- Invoiced Revenue

You can personalize your view to display the appropriate metrics, but additional metrics cannot be added to the list effectiveness bin.

Personalizing the List Effectiveness Views

You can modify what is displayed in the summary, and how the information is displayed by personalizing the view. The Personalize feature provides the following options:

- **General Properties:** You can change the name of the view, specify the number of rows to be displayed in a tabular summary, and provide a description for the view.

- **Column Properties:** You can choose the columns to display in the tabular summary, and the order in which they should appear.

- **Sort Settings:** You can choose three columns to sort on, and specify the sort order.

- **Search Query:** You can specify the query based on which the summary is displayed. Note, you can determine which list trend chart to show by selecting a value for the List Metric Trend Chart here.

See Personalizing Views in the Audience and Campaign Workbenches, page 6-2 for the procedure.

List Metric Trend Chart

The information displayed by the List Metric Trend Chart is based on the view selected in the List Effectiveness bin. The lists appearing are associated with the target groups of active campaign activities. The metric trends chart bin displays a graphical view of the trends for lists corresponding to specific metrics. You can evaluate the effectiveness of your lists over a time period.

You can personalize your view to display the appropriate metrics, but additional metrics cannot be added.

> **Note:** If the profile value for the application is set for ADA compliance, a table with the corresponding information is displayed above the metric trend chart.

Personalizing the List Metric Trend Chart

You can select the metrics and the time lines to be used for the display in the Personalize definitions of the List Effectiveness bin. For example, if you wish to view the Leads Trend chart for the last 5 days, you must select the metric value as Leads and the Time Period as 5 Days in the personalize page of the List Effectiveness bin.

The metric values that you can select from include:

- Leads

- Contact Group Size

- Responses

- Opportunities

- Booked Orders

- Booked Revenue

- Invoiced Revenue

The Time Periods you can select from include Last 5 Days, Last Month, Last 3 Months, Last 6 Months, Last Year, Last 2 Years, and Last 5 Years.

See Personalizing Views in the Audience and Campaign Workbenches, page 6-2 for the procedure.

Active Lists by Purpose

The Active Lists by Purpose bin displays a pie chart that depicts the distribution of the active lists by purpose. Some seeded purposes are Cross Sell, Up Sell, Customer Acquisition, Customer Retention, or any other purposes defined by your administrator. If you are the logged in user, only your lists that are in the Available status are considered for display. Each purpose is displayed in a different color and the lists available for each purpose are displayed as a percentage. For example, if you own ten lists and four of them are for the Cross Sell purpose, then Cross Sell purpose is indicated as 40% in the pie chart.

My Recent Lists

The My Recent Lists bin at the bottom of the Audience Dashboard displays details of your recent lists in descending order based on the last date of update. You can change the sort order to ascending by clicking the Last Updated Date column heading. By default, five lists are displayed.

The information displayed includes List Name, Audience, Purpose, Status, and Last Updated Date and provides you with summary data of your recent lists. You can do the following from the My Recent Lists summary if the list is in Available status:

- Click the list name hyperlink to view the list details. You can then update the details, such as the objective.

- Click the View Entries icon to view the members of a list

- Click the Create Schedule icon to navigate to the Create Campaign Activity page of the Campaign Dashboard where you can create and launch a marketing activity with the list as the Target Group. The Create Campaign Acivity icon is enabled only if the list entries are available.

Shortcuts

The Shortcuts bin is displayed on the top right corner of the Audience Dashboard and contains a list of links that you can click to perform specific tasks or navigate to other audience functionality. The links available may vary as per the responsibility with which you log in to Oracle Marketing. The links are:

- Create List - Click to create a list.

- Lists - Click to navigate to the Lists Overview page from where you can manage the lists that you have access to.

- Search List - Click to display Search Lists page of the Audience tab. You can enter the First Name, Last Name, and so on to search for a specific member, and view the lists that the member is part of.

- Import - Click to display the Imports page of the Audience tab. You can use the import process wizard to import a purchased or rented list or any other list from an external data source. You can then use the imported customer data to generate a list.

- Segments - Click to display the Segments page of the Audience tab where you can define and modify the criteria for generating segments of customers for whom specific marketing activities can be initiated.

- Discoverer - Click to launch the Oracle Discoverer tool in a separate window. You can define the conditions of your list in Oracle Discoverer and include them while generating lists.

- Organizations - Click to search for customer organizations and view organization overview information.

- Persons - Click to search for customers who are individuals and view person overview information.

Related Links Bin

The following links are in the Related Links bin:

- Predictive Analytics - Click to view the Predictive Analytics Overview page.

- Campaign Workbench - Click to navigate to the Campaign Dashboard page where you can create and launch a campaign activity for specific target groups. This shortcut is displayed only if your current responsibility has access to it.

- Reports - Click to view a selection of reports.

- Audience Administration - Click to navigate to the Audience Administration Dashboard. As an administrator, you can create and manage list templates and data sources from the Administration Dashboard.

Creating a List Using Natural Language Query

Using the Natural Language Query (NLQ) template, conditions can be specified just as you would naturally think of them. You can define your selection criteria by selecting the operator and the corresponding value for each condition. Following is a sample query to generate a list of customers who may be interested in buying high-end electronic toys in the state of California for their children. This is what the query template will look like:

```
Customers whose state of residence is name_of_state
And whose annual income is greater than amount
And have children is yesno
```

In the above example:

- is, is greater than are the operators you can enter by clicking on the link

- name_of_state, amount, and yes/no are the values of the condition that you can enter by clicking on the link

- The words and phrases not underlined are the pre and post text included in the selection to make it readable

- The word "and" is supplied by the system

The following is an example with values selected for the above template selection. If necessary, operators can be changed. In the example, the "is greater than" operator has been changed to "is between".

```
Customers whose state of residence is California
And whose annual income is between 50000 and 95000
And have children is Yes
```

You can associate single or multiple values with an operator.

Examples

- To target only the CIOs of an organization, you will enter the condition as:

  ```
  Contact Job Title is CIO
  ```

- To target customers in the states of California and Michigan, you will enter the condition as:

  ```
  State is California, Michigan
  ```

Similarly, you can associate multiple values with the "is not" operator.

For numeric values, you can select "equals" or "not equals" as the operators.

Examples

- To retrieve customers whose age is 18, you will enter:

  ```
  Age equals 18
  ```

- To retrieve customers whose age is 18 or 21, you will enter:

  ```
  Age equals 18, 21
  ```

- To retrieve customers whose age is neither 18 nor 21, you will enter:

  ```
  Age not equals 18, 21
  ```

Navigation: Audience Workbench > Create Lists

1. Enter a name for your list, select an audience, and a purpose.

2. From the List Creation Method region, select Standard.

3. Using the search icon, select a Standard template to base your query on.

4. Click **Continue**.

   Any mandatory and/or default conditions defined for the template that you have chosen is displayed. Mandatory conditions cannot be removed.

5. Click the hyperlink on the operator and condition value to modify it.

   Repeat this step until all conditions are filled. You must fill in all the conditions.

6. To add or modify the selection conditions, click **Modify Selections**.

   You can add more conditions. However, the selections displayed is restricted to your template definition.

7. To view the projected running total when the list is generated, click **Recalculate**.

   Note: This may take some time. Please wait till the process is complete.

   The Recalculate button will be displayed only if the Recalculation functionality has been enabled by the administrator.

   The projected running total number gives you an idea of how many records will finally be selected when the list is generated.

8. To define what to include in or exclude from the list, click **Options**.

9. To view the SQL statement for this query, click **SQL Statement**.

10. To save the selections, click **Finish**.

    The Generation subtab appears. At this point, you have only defined the list selection criteria. The list must be generated before proceeding to step 14 and 15.

11. To view the entries in the list, click the Entries subtab.

    The list entries can be viewed only if it is generated successfully and is in the Available status.

12. Optionally, to add entries manually to the list, choose the Add Entries Action in the Entries subtab. For more information on adding manual list entries, see Adding Manual List Entries, page 4-17.

13. To view charts of how the entries are distributed based on the selected conditions, click the Charts subtab.

    The charts can be viewed only if the list is generated successfully and is in the Available status.

14. To create or view notes, click the Notes subtab.

Creating a List Using Parameterized SQL

The Parameterized SQL List template is based on a SQL statement with parameters provided by your administrator. The selection parameters are presented, and you must enter the values for the parameters while creating the list.

In the Parameterized SQL template, the selections are displayed as a list of parameters whose values you can enter directly. For example, if the purpose for the list is Cross Sell and the selected list template is Cross Sell Based on Orders, the parameters to be specified can be Product, Cross Sell Product, Date of Purchase, Order Amount Greater Than, and Contact Job Title.

> **Note:** The condition between the parameters will always be AND when using the parameterized SQL.

Navigation: Audience Workbench > Create List.

1. Enter a name for your list, select an audience, and a purpose.

2. From the List Creation Method region, select Standard.

3. Using the search icon, select a Parameterized SQL template to base your query on.

4. Click **Continue**.

   The Selections region displays the parameters defined for this template.

5. Enter values for the parameters, or select them from a drop-down list or a list of values.

6. To define what to include in or exclude from the list, click **List Options**.

   For more information on List Options, see Understanding List Options.

7. To view the SQL statement for this query, click **SQL Statement**.

8. Click **Finish**.

The page refreshes, and the Generation subtab appears. At this point, you have only defined the list selection criteria. The list must be generated before proceeding. For more details on generating a list, see Generating Lists.

9. Optionally, to view the list generated based on your query, click Preview Entries from the Selections tab.

Note: The result for this action may take some time. Please wait till the process is complete.

10. Optionally, to view the number of entries in the list, click **Preview Count** from the Selections tab.

Note: The result for this action may take some time. Please wait till the process is complete.

Note: You can preview the list size only if the administrator has enabled the recalculation functionality. See Understanding Recalculation for more information.

11. To view the entries in the list, click the Entries subtab.

The list entries can be viewed only if it is generated successfully and is in the Available status. For information on other options in this subtab, see Managing Lists.

12. Optionally, to add entries manually to the list, choose the Add Entries Action in the Entries subtab. For more information on adding manual list entries, see Adding Manual List Entries.

13. To view charts of how the entries are distributed based on the selected conditions, click the Charts subtab.

The charts can be viewed only if the list is generated successfully and is in the Available status. For more information, seeViewing Customer Attribute Charts for a List.

14. To create or view notes, click the Notes subtab.

Creating Lists Using Advanced Methods

Advanced list creation offers unlimited flexibility to create lists. You can create a list based on different Source Types. The source type can be a list, segment, Oracle Discoverer workbook, custom SQL, or an imported list. For each source type, you can select an instance of the source type and base the new list on it.

When using advance methods, it is possible to include a combination of source types to arrive at a complete list. If you are a knowledgeable SQL user, you can also formulate your own SQL query to create a list.

When a source type is selected, it is displayed in the Selections area. You can select multiple lists with a combination of source types. The selected source types are displayed in a tabular format. The columns of this table are described below:

- **Action:** You have a choice of three- Exclude, Include, and Intersect.

    - Choose Include when you want to add the entries to the final list you are creating.

    - Choose Exclude when you want to remove the entries from the final list you are creating.

    - Choose Intersect when you want to include only the common entries with other include entries to the final list.

- When there are multiple source types selected, some prospects may be members of more than one list. In such a case, you can decide which list the common members must be included or excluded from. Sometimes, you can choose to intersect with another list. As a result, only common members will be selected as part of the resultant list.

    > **Note:** Only the Include action is available for the source type in the first row.

- **Name:** Displays the name of the source type that you selected. The name is a hyperlink that you can use to navigate to the details page.

- **Type:** Displays the source type of the object selected. It could be List, Segment, Workbook, Import, or Custom SQL.

- **Size:** Displays the size of the list, segment, or import selected. The size information will help you decide how many records you actually want in your list. Because a segment is dynamic, the size will only be as current as the last time the segment was refreshed. The size column will only display values for a list, an import list, and a segment.

- **% Requested:** You can enter a value to indicate what percentage of the selected object must be included when your list is generated. Based on the percentage, a random selection of records is included in the list. This option is applicable only for the Include and Intersect actions.

- **Dedupe Rank:** When multiple objects are selected for list creation, and you have selected Include as the Action, you can enter a number to indicate from which object a record must be included, in case duplicates of the record exist in more than one location. For example, if List1 and List2 are two lists you have included for your list generation and you specify Dedupe Rank as 1 for List1 and Dedupe Rank

as 2 for List2, if a record is found to exist in both lists, the record from List1 will be included in the final list because List1 has higher rank than List2.

- **# of Duplicates:** Displays the number of duplicates that were identified in the selected object during list generation. Duplicates are identified based on the deduplication rule.

- **Running Total:** Displays the number of records included. After each Include operation, the deduplication rule is applied and the resulting number of records are cumulated. For example, if you select two lists and both are Include operations, the Running Total for row one will the number of unique records from the first list and the Running Total for row two will be the cumulation of the unique records of row one and unique records of row two. To display the Running Total, click the **Recalculate** button. The running total does not take into account the deduplication rule when the Recalculate button is clicked.

- **Delta:** Displays the difference between the Running Totals of the current row and the previous row.

Creating a List using the Advanced Method

Use the following procedure to create a list using an existing list, segment, workbook, imported list, or SQL.

Navigation: Audience Workbench > Create List.

1. Enter a name for your list, select an audience, and a purpose.

2. From the List Creation Method region, select Advanced.

3. Click **Continue**.

4. In the Selections region, from the Add drop-down list, select the source type for your list. Only sources of the same audience are displayed when you click the Go button for the steps below.

   1. To create a list from an imported list, select Import List, and click **Go**. To import a list, see Importing a List.

   2. To create a list from an existing list, select List, and click **Go**.

   3. To create a list from an existing segment, select Segment, and click **Go**. To create a segment, see Creating a Segment.

   4. To create a list from a Discoverer workbook, select Workbook, and click **Go**. For more information on workbooks and how to create them, see the *Oracle Discoverer User Guide*.

When creating workbooks in Oracle Discoverer, certain mandatory identifiers must be selected for list creation based on such workbooks to be successful. The following table lists these mandatory identifiers:

Business Area	Folder	Mandatory Identifier
Audience Workbench Organizations	Organization Details	Include Organization Details
Audience Workbench Organizations	Organization Contact Details	Include Organization Contact Details
Audience Workbench Persons	Person Details	Include Person Details

The rest of the folders represent child data sources and cannot be used to define workbooks independently. For workbooks in these folders, the mandatory identifier columns from the parent folder are needed for list generation to be successful.

5. To create a list using a SQL query, select SQL, and click **Go**. See Creating a Custom SQL to create a custom SQL statement.

   One or more of the above sources can be used to create a list.

5. To Include, Exclude, or Intersect entries in a list source, select the appropriate option from the Action column.

   This first action must always be Include.

6. To calculate the number of entries from each source, click **Recalculate**.

   If the recalculation functionality is enabled, a concurrent request is submitted to calculate the number, and the request ID is displayed. You must return to this list at a later time to view the result. See Understanding Recalculation for more information.

7. To change the order of the sources, click **Reorder**. Using the up and down arrows, reorder your selections and click **Apply**.

8. To delete a list source from the selection, click the icon from the Delete column.

9. To define the list deduplication or limit the size of the list, click **List Options**.

   For more information on List Options, see Understanding List Options.

10. Click **Finish**.

The page refreshes, and the Generation subtab appears.

11. Use the Generation subtab to generate the list. See Generating Lists for more information.

12. Click the Entries subtab to view the entries in the list.

    The list entries can be viewed only if it is generated successfully and is in the Available status. For information on other options in this subtab, see Managing Lists.

13. Optionally, to add entries manually to the list, choose the Add Entries Action in the Entries subtab. For more information on adding manual list entries, see Adding Manual List Entries.

14. Click the Charts subtab to view how the entries in the list are distributed based on selected attributes.

    The charts can be viewed only if the list is generated successfully and is in the Available status. For more information, see Viewing Customer Attribute Charts for a List.

15. Click the Notes subtab to create or view notes.

Creating Lists Using Discoverer

You can create a list using a Discoverer query that is launched from within the Oracle Marketing application, and a list manager can create and manage workbooks and worksheets needed for list management purposes. For more information on creating lists with Discoverer, see the *Oracle Marketing Implementation Guide.*

Creating a Custom SQL

While creating a list using the Advanced method, you can create a custom SQL statement. If you are a knowledgeable SQL user, you have the flexibility to create your own query. Unlike a template, you do not have any restrictions, and can generate any kind of lists.

Prerequisites: Knowledge of SQL

Notes

- At least one master type data source key should exist in your select statement. A sample statement is given below:

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

  Note: The SQL statement cannot contain "Order By" or "Group By" clauses within it.

Generating Lists

When a list is generated, customer records satisfying the list conditions are populated in the list. A list can only be generated after all the conditions have been specified. The amount of time it takes to generate a list depends on several factors such as the size of the database and the system environment condition at the time a list is being generated.

Generation Types

You can also choose from three Generation Type options:

- **Full Refresh:** Choosing this option will result in a new list, if the list is generated for the first time, or remove all previous entries and replace with new entries if the list has previously been generated. If you regenerate a list after adding manual entries to it using the Full Refresh option, you will lose the manual entries and may have to add them again.

- **Append New Records:** In this mode of list generation, all the list entries and information about those entries from the previous generation will be retained. New entries that meet the specified selection criteria will be added to the existing list. Using this generation type could result in the list entries and information about those entries not matching the selection criteria completely.

- **Update Attributes Only:** In this mode of list generation, if any modifications are made to the customer attributes in the corresponding data source or Audience, those changes are updated within the list entry records. For example, if the Audience is Organization Contacts and changes are made to the customer attributes in the Oracle Customer Model (TCA), the latest information about the entries will also be updated in the list. Using this generation type could result in the list entries and information about those entries not matching the selection criteria completely.

Schedule a List Generation

When you are satisfied with the conditions specified for the list, you can choose to schedule it for generation. A list can be generated immediately or at a future time. For generating at a future time, the system defaults to 12am the next day. For example, if the system date is 07/17/03, list generation is scheduled for 07/18/03 at 12:00 a.m. You can choose to change the default date and time for list generation.

List Generation Log

As a list is being generated, the system logs messages in a log that you can view to track the progress of list generation. Additionally, when the status of a list changes, the system logs the change in the log. Log messages are stored in descending order of date, that is, the latest log message is at the top of the list; you can reorder the log to display it

in ascending order of date.

Generating a List

Use the following information to specify the generation type and time to generate a list.

Prerequisites: You must have specified the conditions for the list.

Notes

- **Generation Type:** Use this drop-down list to specify how you want to generate the list.

- If you wish to view the status of the list generation, refresh this page by clicking the Refresh button on the browser. The list status does not change on its own. This is particularly useful if you have chosen to generate the list immediately.

Adding Manual List Entries

You can add entries manually to lists from the Audience Workbench or using the Target Group functionality for campaign activities. For lists created based on the seeded data sources - Organization contacts and Persons - you can manually search and add customers from TCA to the corresponding list or target group.

The following business scenario demonstrates the need to add entries manually to an existing list.

Example

A marketing campaign is planned to up sell laser printers to existing ink jet printer customers. The target audience for this campaign includes decision makers in Fortune 5000 companies located in the United States. In addition to the target list created using this condition, marketers would also like to manually add one or more customers that they know have recently purchased ink jet printers, but whose information has not yet been captured within the order management systems. Marketers can use the manual list entries addition feature to add these customers to the list. These manually added customers may or may not necessarily satisfy the target selection (decision makers in Fortune 5000 companies) but are potential buyers based on the marketer's knowledge of these customers.

Navigation: Entries subtab of the List Details page

Notes

- You can add manual entries to lists that have been created based on the seeded data sources, *Organization contacts* or *Persons*.

- You can add manual entries after a list is generated successfully and is in the "Available" status.

- Manual entries may or may not satisfy the basic conditions used to create the list.

- For repeating activities, when manual list entries are added, the target group of the first instance of the schedule is regenerated.

- When you search for records within TCA, only Active records will be considered.

- You can sort the entries using the Manual Entries column.

- For manual entries, list options are applied as follows:

  - Deduplication Rules: If any of the entries you manually add already exists in the list, deduplication rules will ensure that these entries are not included in the list.

  - Size Restrictions: Because of a manual list entry, if a list is exceeding any specified maximum list size or random x% of records, the manual entry will not be included in the list.

- Any manual entries added to the target group are eligible to be selected in the control group. If you do not want your manual entries to be selected for the control group, then add the manual entries after the control group selection is complete. See Defining Control Groups, page 11-24.

Managing Lists

After a list is generated, you can view the entries it retrieved, modify its conditions, split a list into two or more lists, merge two lists, and so on. You can manage lists from the List Summary and detail pages.

Sections include:

- Exporting a List, page 4-18

- Viewing Customer Attribute Charts for a List, page 4-19

- Splitting a List, page 4-19

- Merging Lists, page 4-21

- Deleting a List, page 4-21

- Creating Campaign Activities from a List, page 4-21

Exporting a List

You can export a list to:

- share it with external parties who may not have access to the application

• modify it offline and import it back into the application

A list is exported in the form of a single .csv file. The columns in the file include the currently displayed columns for the list and all Enabled columns, whether they are displayed or not.

Only generated lists with entries in them can be exported.

Viewing Customer Attribute Charts for a List

The Charts page helps you to understand and quickly analyze grouping of the customer within your list. You can decide based on the chart analysis if adjustment to the selection criteria is required. Four charts can be displayed at one time. The chart can be of Pie, Column, or Bar format.

Your administrator can specify which attributes to chart as well as define the default chart format to display. You can select different attributes and different chart types for display and analysis if the default does not suit your need. For example, in a B2B scenario, you may want to analyze the customer distribution by industry in a list and in a B2C scenario, you may wish to understand customer distribution by household incomes.

The administrator can also define chart ranges for the attributes. For example, for the chartable attribute Household Income, the administrator can define chart ranges as follows - Less than 50000, Between 50000 and 100000, Between 100000 and 250000, and Greater than 250000. When you view the chart, list entries are grouped on these ranges.

Notes
• Only those attributes that are defined as Chartable by the administrator will be available in the drop-down list.

• When an attribute is selected, the page refreshes to display the chart based on the new attribute.

• You can also split the list based on a selected attribute.

Splitting a List

Lists may need to be split into smaller lists for campaigns that have multiple phases, each designed to target customers with slightly different profiles. Splitting a list results in significant time saving as compared to generating them separately. For example, for an electronic toys product launch campaign, a list containing high income customers in California may need to be split to generate a list of high income customers with children and without children.

When you split a list, multiple lists are created from it. You can split a list using one of the following three methods. The entries for the new lists are chosen randomly.

• **Split by Percentage:** You must enter the percentages based on which the split lists

will be created. For example, if the original list contains 1000 entries, and you indicate that it must be split into two lists, with the first list containing 75% of entries and the second 25%, it results in the first list containing 750 entries and the second list 250 entries.

- **Split by Number:** You must enter the actual sizes of the resulting lists as numbers. For example, for a list containing 1000 entries, you can indicate that the first list will contain 750 and the second will contain 250 entries.

- **Split by Attribute:** You can select the attribute based on which the list will be split. For example, you can choose to split the original list based on the Industry attribute resulting in a set of lists, each containing the entries for a particular industry.

  Only those attributes that are defined as Use for Split by the administrator during data source definition are available for splitting a list. A list can be split based upon the attribute LOV or chart definition.

  For example, for the Industry attribute, the list of values may be Automotive, Health Care, and IT. The split lists will be one for each industry.

  For the Attribute Household Incomes, a chart range may be defined. The chart ranges defined may be Less than 50000, Between 50000 and 100000, Between 100000 and 250000, and Greater than 250000. The original list will be split into four lists, with each chart range being the condition for the split for the respective list.

  For more information on data source definition, see the *Oracle Marketing Implementation Guide*.

Notes
- Select Generate List for Others to create a separate list called Others to contain any records that have null values or no matching values for the chosen attributes.

- Select Generate List with Zero Counts to create the list even though no records match the selection criteria.

- To be able to split a list, the list must be generated and must have entries in it.

- If you have chosen to split by attribute, only those attributes that are defined as Use for Split by the administrator during data source definition are available for splitting a list.

- Click Preview Count to see the counts for your entered percentages or selected attributes.

- By default, the application allows you to split a list into five. You must add more rows if you are splitting the list into more than five.

- The split lists are created as individual lists.

- You cannot split an archived list.

- When you split a list with the status of Scheduled, all the child lists are automatically scheduled to be generated. A workflow is started to generate the split child lists.

Merging Lists

When two or more lists are merged, a single list is created. Only lists that are already generated, have the same audience, and are in the Available status can be merged.

The final merged list may not contain the sum of the individual lists. This is because the records with the same Party ID are automatically deduped. This is in addition to using the dedupe rule. In this case the whole is not always equal the sum of the parts.

Notes

- To merge two lists, both the lists must be generated, and must have entries in it.

- **% Requested:** If you require some entries from each list to be merged, enter a percentage number for each list.

Deleting a List

You can choose to delete one or more lists. If a list is used in a Campaign or Event schedule, and the schedule is still active, the list, as an independent object cannot be deleted. However, the list can be removed from the schedule.

Creating Campaign Activities from a List

When you choose to create a campaign activity from the Lists page, the creation of a new campaign activity is launched, and the entries in the selected list become candidates of the target group. When the target group is generated, the entries may be a smaller set after suppression criteria and fatigue rules are applied.

When you create a campaign activity from a list, the list's Purpose will automatically become Campaign Activity. You can create a campaign activity from a list only if the list contains at least one entry.

To create a campaign activity from a list, click the icon from the Create Campaign Activity column in the Lists page.

Creating and Managing Segments

Market segmentation identifies groups of customers, or prospects that satisfy business-defined strategic or tactical criteria. For example, a car manufacturer may need to identify different types of consumers based on lifestyle preferences to segment their car buying market accordingly. Once segments are identified, marketers may develop

specific marketing programs that will uniquely target each segment.

Topics in this section include:

- Segments Overview, page 4-22

- Creating a Segment, page 4-23

Segments Overview

Segmentation criteria can be saved and used as the basis for list, or target group generation. For example, a segment could be defined for Credit Card dormancy, based on the date of the last customer purchase transaction.

Segments can be created using either a Oracle Discover workbook, or a SQL statement. Unlike a list, which has a fixed set of entries, the entries within a segment may differ over time as customers and prospects migrate in and out of the segment as they satisfy/dissatisfy the business criteria on which the segment is based.

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

Segment Hierarchies

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

Consider the following example:

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

Segment B: High income families

Segment C: High income families with kids

Segment B is defined as a child segment of Segment A, and Segment C is a child segment of Segment B.

The segment hierarchy for the above example is depicted in Table Segment Hierarchy Example, page 4-22.

Segment Hierarchy Example

Segment Name	Segment Criteria	Segment Count	Segment Hierarchy	Segment Condition
Segment A	All Customers	100,000	N/A	N/A

Segment Name	Segment Criteria	Segment Count	Segment Hierarchy	Segment Condition
Segment B	High income families	25,000	Child Segment of Segment A	Intersection of Segment B and Segment A
Segment C	High income families with kids	10,000	Child Segment of Segment B	Intersection of Segment C and Segment B

Creating a Segment

When you create a segment, you can either choose to base it on an Oracle Discoverer Workbook or write your own SQL statement. If you choose Workbook, the associated SQL statement for the Workbook is displayed in the SQL section. This SQL statement is not editable. If you choose SQL, you must enter the SQL statement in the SQL text field.

Notes

- **Parent Segment:** To create a segment hierarchy, select a parent segment. The current segment definition will be a child of the selected parent segment.

- **Type:**

    - If the Type is Workbook, click the Search icon to select a Workbook.

    - If the Type is SQL, enter a data source name, and then enter a SQL statement in the SQL field.

- The initial status of the segment will be Draft. The Available status implies that the segment is available for lists and target groups. The Cancelled status implies that the segment is not available for lists and target groups.

Valid Segment Queries

A valid SQL query (from Oracle Discoverer Workbook or directly typed in Oracle Marketing) must meet the following conditions.

- The query statement must be formatted correctly.

- The setups that map the results of the segment to a list must be complete.

- The query must contain a data source code for mapping. The code for a data source is entered by the administrator while creating it.

- The query must contain a unique identifier for the data source.

- The query must contain Country if Address 1 is included.

- The query must not contain Order By or Group By clauses within it.

  If the query contains an alias, the alias must be the same name as the data source view name. This is essential for generating lists based on such segments.

A minimal SQL statement for creating a list will be:

```
Select '<data source code>',<unique identifier> from <data source
object>
```

In the above example, if the data source's code is 'EXAMPLE_DS', the correct segment query will be:

```
select 'EXAMPLE_DS', party_name, party_id from hz_parties
```

> **Note:** Do not enter ; at the end of the SQL statement.

When a segment query is not valid for list generation, the following error message is displayed:

```
"Error: Cannot create list based on this segment. Please recheck the sql
segment"
```

For the query to execute correctly and create a list with entries in it, a data source is required.

Creating and Managing List Imports

This is the process used to import external data, such as a purchased or rented prospect list, into Oracle Trading Community Architecture.

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

Topics in this section include:

- Overview of List Imports

- Rented vs. Purchased Lists

Overview of List Imports

The List Import feature enables you to enrich your customer data with purchased lists and also consolidate the customer data from legacy systems. This feature facilitates the importing of:

- Prospects for marketing campaigns

- Customers into the Oracle Customer Model (TCA)

- Leads for following up by Oracle TeleSales

- Event registrants for processing in Oracle Marketing's event module

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

The list import process is in the form of a wizard that guides you through the process of importing a rented or purchased list of prospects. The steps in the wizard include:

1. Selecting the Import Type (Persons, Organization Contacts, Leads, Event Registrants)

2. Specifying the location of the file

3. Mapping the fields between the source file and the destination columns (for a list of fields that can be imported, refer the *Oracle Marketing Implementation Guide*)

4. Importing the list import table with the source data

Once the records have been imported, they can be used for campaign or event target group generation.

Rented vs. Purchased Lists

During the import process, you can specify if the source for the import data is from a Rented or Purchased list. Table Rented Vs Purchased Lists, page 4-25 highlights the difference in processing for these two sources.

Rented Vs Purchased Lists

Rented List	Purchased List
Data stored within a staging area (AMS_LIST_ENTRIES) in Oracle Marketing	Data stored within the staging area and are added to the Oracle Customer Model (TCA)
Dummy, inactive records created in Oracle Customer Model (TCA) for the corresponding records	Corresponding customer information is inserted into the Oracle Customer Model (TCA)

Rented List	Purchased List
Rented records are purged based on usage or expiry date	Purchased records are not purged and are maintained within the Oracle Customer Model (TCA)

Importing a List Using the List Import Wizard

The list import wizard walks you through the process of importing a rented, purchased, or other lists.

Prerequisites

❑ A flat file (.csv format) or an .xml file, located in your computer, a server, or an ftp site. The .xml file format applies only to Organization Contacts (B2B) and Persons (B2C).

1. Log into Oracle Marketing with the appropriate responsibility, and access the Audience Dashboard.

2. Click the Import link from the Shortcuts bin.

3. Click **Create** to start the Import Wizard.

4. Select the Import Data Type.

   By default the Organizations, Contacts, Addresses option is checked.

   If you select Event Registrations, ensure that you pass the registration source type code and not the meaning for the lookup. Refer *Oracle Marketing Implementation Guide* for a list of event registration sources.

5. You can either click **Next** to continue the import process or you can click Setup to configure the default import mapping and the fields that are to be exposed during Import Preview.

   • If you click Next, then proceed to step 6 of this procedure.

   • If you click **Setup**:

     1. Specify the default import mapping for .csv or .xml files. By specifying this default mapping for an import type, you do not have to configure the mapping during the list import wizard process. The default import mapping for an import data type will be automatically applied to the import process.

2. From the Preview Selection region, select the fields that are to be exposed during the import preview, by selecting the Available Fields to the Exposed Fields section.

3. Click **Apply** to apply the changes.

4. Click **Return** to return to the import wizard.

6. On clicking Next to continue the import process, the Import Step 1a: Definition page appears.

1. Enter a unique name and description for the Import.

2. In the Source File region, select the location for the source file.

   1. Choose Client if the source file is located on your computer, and click Go to browse for the location of the source file.

   2. Choose Server if the source file is located on a server.

      It must be located in the directory specified by your System Administrator. Refer to the *Oracle Marketing Implementation Guide* for additional information for server side imports.

   3. Choose FTP to specify an FTP address for your source file.

      Also provide your user name, password (to access the file) and the file name.

3. Select the Character Set for your import source file.

   By default this is set to 'Western ISO-8859-1". You can also choose from European (ISO-8859-2), Japanese (SHIFT-JIS), and so on.

4. Specify the column delimiter for your source file.

   By default this is set to "Comma". For a .csv file, choose Comma.

5. Select the Field Enclosed By for your source file.

   By default this is set to "Double Quotation". For a .csv file, choose Double Quotation.

6. Select the File Header Exists check box, if the file has a header row.

   When you check this, make sure that the first line of your file has the column headings (field names).

7. Select a deduplication rule that needs to be applied while generating this import.

The deduplication rule will directly be applied only on the source file that is being imported. The deduplication rules can be configured by your System Administrator.

8. Check the Use Word Standardization check box to apply Word Standardization Rules on the import data.

   Word Standardization is used in the deduplication process. For example, when the Word Standardization is checked, the words "Street" and "St." are treated the same. The Word Standardization rules can be configured by your System Administrator.

9. Click **Next** to proceed to the next step of the import wizard.

7. Enter Additional Details for the import:

   1. Select the source for your import.

   2. Enter a Vendor and Cost. These are optional entries.

   3. If you choose a Rented List as your source, you must enter either an expiration date or the number of uses.

      • **Number of Uses:** The number of uses for a rented list is based on the number of campaign schedules that are made Active using a particular rented list.

      • **Expiration Date:** You need to run the AMS: Purge Imported List concurrent program to purge the entries of the Rented List after the expiration date. If the source chosen is other than a rented list, this is an optional entry.

   4. Click **Next** to save and continue the import process.

      The Import Mapping page appears. If a default mapping has been specified through the Import Setup, then this page will not be displayed.

8. In the Import Mapping section, you can specify the mapping between the source fields to target fields.

   You can load an existing mapping to map the source and target fields. This is beneficial if the source file has to be imported regularly.

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

   1. To do the mapping, select an item from the Source Fields column and the corresponding item from the Target Fields column, and click > to move the field mapping to the Mapping: Source => Target column.

Continue until all desired fields are mapped.

2. To remove an existing field mapping, highlight the item mapping in the Mapping: Source => Target column and click the <.

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

3. See the Preview field for the data from the import file.

4. Click **Next** to save the changes on this page and move to the next step of the import process. If a name for the new mapping is provided, then the new mapping will be saved.

   The Import Step 3: Review page appears.

9. Review the import information.

   1. In the General region, you can specify the error threshold number for this import.

      The Error Threshold identifies the maximum number of errors that can occur during list import. For example, if Error Threshold = 100, it implies that there can be a maximum of 100 errors before the list import stops processing additional import records. Records prior to the error threshold being reached will be imported using the regular import logic.

   2. To update existing records, select the Record Update box.

      The list import process uses the existence checking rules to match the records in the import source file to the Oracle Customer Model (TCA). If a match is found, then the customer record in the Oracle Customer Model (TCA) is updated with additional information from the source file. If this field is cleared, then the import source file records are inserted into the Oracle Customer Model (TCA) even if a match exists between the Oracle Customer Model (TCA) record and the import source file.

   3. To validate the data, select the Validate Data box in the Validate region.

      For example, date fields can accept data only in the date format, data for a field with a list of values should contain one of the values specified, and so on.

   4. To automatically generate a list upon import, select the Generate a List upon Import box.

      By default, this field is cleared. If you select this field, you must provide the List Name. By default, the List Name has the same name as the Import name. You can overwrite the default List Name.

   5. To preview the data being imported, click the **Preview** button.

The fields that are displayed in the Preview page are based on the "Exposed Fields" that are set up in the Import Setup page. By default, the mandatory fields are always displayed as part of the Preview page

6. After reviewing the details on this page, click Import to begin the import process.

   A confirmation page appears.

7. Click **Finish** to return to the Import Summary Page where the import results can be viewed.

8. Optionally, click **New Import** to import data from a new source file.

Handling List Import Errors

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

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

For information on how to handle list import errors, see the section titled List Import Errors in the *Oracle Marketing User Guide.* Information includes:

• Import Errors

Viewing Organization and Person Information

You have a selling relationship with a person or organization, regardless of whether anything has been purchased or serviced. A selling relationship can be established simply by negotiation terms that will be used if you later sell products. You create lists, segments, and target groups from a data source of Persons in a Business to Customer (B2C) scenario and a data source of Organizations in a Business to Business (B2B) scenario.

5

Optimizing Audience Lists with Predictive Analytics

This chapter covers the following topics:

- Overview of Predictive Analytics
- Understanding and Building Predictive Models
- Evaluating Model Build Results
- Improving Model Results
- Building a Model
- Understanding Scoring Runs Generation

Overview of Predictive Analytics

Predictive analytics is a process used to discover strong, meaningful patterns and relationships in large amounts of data. These patterns and relationships are used to more accurately predict and analyze the behavior of customers and prospects.

For example, you can use the Oracle Data Mining functionality within Oracle Marketing to predict customer behavior for a variety of purposes, such as identifying which customers are most likely to:

- Respond to your marketing campaign
- End their relationship with your organization
- Purchase a particular product
- Be profitable to you

Effective predictive analytics enables you to make better business decisions. You can more effectively apply your marketing budget by targeting only the strongest prospects, thereby driving up margin.

The predictive analytics process consists of the following general steps and concepts:

1. Building a model

   A model is a set of rules that can be used to predict the value of a specific customer attribute based on the known values of other attributes.

   Building a model involves using data mining algorithms to create a set of rules based on the training data it is supplied. The training data is historical information about existing customers. This information consists of the known values for customer attributes such as direct mail responder, income, age, gender, and so on.

   Oracle Marketing provides seeded model types (three response, one loyalty/retention, one product affinity, and one customer profitability models) to help automate the data mining process. Custom model types that predict any customer behavior can also be implemented.

2. Evaluating model results

   Three reports are generated automatically when a model is built: Lift Chart, Performance Matrix, and Attribute Importance. By evaluating this information, you can determine the accuracy of the model and make adjustments to the training data that will improve the performance and predictive power of the model.

3. Scoring a target population

   The process of scoring is also referred to as executing a scoring run. During a scoring run, a model is used to predict the future behavior of a target population. The score assigned to each customer record in the target population indicates the likelihood that this customer will exhibit a particular behavior. For example, customer A may be scored with a 90% probability of responding to a particular e-mail campaign.

4. Viewing the scoring run results and generating a list

   The scoring run results are presented as a continuous range of 10 segments. Each segment has an associated percentage range (for example, 80–89.99%). The percentage indicates the likelihood that the customers within a particular range will exhibit the target behavior.

   From the scoring run results page, you can generate lists of customer records. The breakdown into segments allows you to narrow your target population and select only the customers who exhibit the desired behavior.

   Each of the steps above is described in more detail in the following sections.

Understanding and Building Predictive Models

The process of building a model consists of the following steps:

1. Creating the model by selecting a

- Model type, page 5-3

- Target, page 5-5

2. Selecting the training data, page 5-6

3. Building (training) the model, page 5-7

The target comprises a target field and a data source. The data source is implied through the model type and target field association.

Related Topics

About Model Types

Oracle Marketing models are predictive models used to predict future customer behavior. They are built using the Naive Bayes algorithm, which can predict binary or multi-class outcomes. Currently in Oracle Marketing, this algorithm is used to predict the binary outcomes of a target field.

For example, you might want to predict which customers are likely to respond to a direct marketing campaign. The possible values for the target field would be yes or no.

The following model types are seeded in the application and are designed to automate the model building process.

- Response models

  - E-mail

  - Direct Mail

  - Telemarketing

- Loyalty/Retention model

- Product Affinity model

- Customer Profitability model

- Custom model

  A description of each model type is provided in the following table.

Model Types

Model Type	Description
Response	Use these three model types (e-mail, telemarketing, and direct mail campaigns) to predict which customers and prospects are most likely to respond to the corresponding marketing activity.
Loyalty/Retention	Use this model to predict which customers are likely to end their relationship with your organization.
Product Affinity model	Use this model to predict the likelihood of a customer purchasing a particular product or products from a particular product category. This model analyses a customer's past purchasing patterns for a product or product category and predicts the customer's affinity for a product or product category. After building this model for a specific product or product category, you can score a list to determine the product affinity.
Customer Profitability model	Use this model to score customers and prospects with unknown profitability to determine which ones are likely to be profitable. The Customer Profitability model will identify and score a single customer record to predict the customer's profitability. For Organization Profitability model, you can score a list of organization contacts and predict their likelihood of being profitable.
Custom	Use this model to predict any type of customer behavior within the Oracle customer model (TCA) or a user-defined data source. The target behavior must be based on a data attribute that is binary (yes or no) in nature.

Sample Business Scenarios

The following scenarios are examples where you can use predictive modeling to help you generate lists whose members are most likely to exhibit the desired behavior. Sections later in the chapter describe the different functionality and tasks mentioned in the scenarios in detail.

- You find that the number of responses to your campaigns for specific products are decreasing. You will create a Product Affinity model, train it using a list of customers who have bought the product in the past, build the model, and test its effectiveness. You can then score a list of new customers or prospects and predict the probability of their purchasing the product.

- You have budgetary restrictions and would like to generate an optimal list of customers to target. After building and scoring your model, you will perform an Optimal Targeting Analysis. For this, you will update the cost and revenue data, generate and view the Optimal Targeting chart, enter budget constraints, and generate the optimal list you should target in a campaign activity.

About Data Sources and Targets

When creating a model, you must select a data source and a target. A data source consists of a flexible set of customer attributes that are evaluated by the data mining engine. The data mining engine determines which attribute values correlate with the target behavior (yes or no).

A target field is a column in the data source that represents the customer behavior you are trying to predict. Selecting the target while creating a model automatically selects the target field. For example, your System Administrator might define a target called Home Ownership that is mapped to a column in a specific user-defined data source with the name Own Rent Flag.

Oracle Marketing currently supports binary outcomes for the target field. As such, the possible value for a target field must either be binary or must be mapped to a binary outcome. For example, if the value for a field can be an income, and you are interested in high income households, then values equal to or exceeding $100,000 could be mapped to 1 (yes), and values under $100,000 could be mapped to 0 (no).

User-defined data sources and target fields can be set up by your System Administrator. System Administrators should also know the attributes present in these data sources.

Oracle Marketing provides two seeded data sources for each model type: TCA Persons for B2C models and TCA Organization Contacts for B2B models. Both of these data sources are associated with customer data from the Oracle customer model (TCA). Refer the *Oracle Marketing Implementation Guide* for a complete list of attributes included in the seeded data sources.

The following table lists the seeded targets and data sources provided by Oracle Marketing for the different model types. For Custom model types, your System

Administrator must define the associated target fields and data sources. They can also create additional data sources and targets for the out-of-the-box models.

Seeded Target Fields and Data Sources

Model Type	Data Source	Targets
Direct Mail Response	Organization Contacts	B2B: Direct Mail Responders
	Persons	B2C: Direct Mail Responders
E-Mail Response	Organization Contacts	B2B: E-Mail Responders
	Persons	B2C: E-Mail Responders
Telemarketing Response	Organization Contacts	B2B: Telemarketing Responders
	Persons	B2C: Telemarketing Responders
Loyalty/Retention	Organization Contacts	B2B: Loyalty/Retention
	Persons	B2C: Loyalty/Retention
Product Affinity	Organization Contacts	B2B: Product Affinity
	Persons	B2C: Product Affinity
Customer Profitability	TCA Organization Contacts	B2B: Customer Profitability
	TCA Persons	B2C: Customer Profitability
Custom	None	None. Must be set up by your System Administrator.

About Training Data

In data mining, a model requires a data set from which to learn and build the model. The data set is referred to as the *training data* and the process of learning is referred to as *training* the model.

Training data consists of organizations contacts or individuals that you select. It should consist of members:

- Whose characteristics closely resemble the target population that will be scored with the model

- Whose behavior and responses are known

The more similar the training data is to the target population, the greater the predictive power of the model. For example, to conduct a telemarketing campaign for consumers, you would train the model using data that consists of consumers targeted by a similar telemarketing campaign in the past, and whose response to the campaign is known.

> **Note:** If historical information from a similar campaign is not available, you must create and execute a test campaign before you can build a model.

About Building a Model

As mentioned above, model building is the process of training the model using a data set that you have selected. The data set consists of both positive and negative values (responses, affinity, or profitability). During model building, the data set is divided into two parts: *input data* (70% of the training data set) and *holdout* or *test data* (30% of the training data set). The test data is to used to validate the discovered relationship and patterns for determining the effectiveness of the model.

Both positive and negative values are split in the 70:30 ratio. Which means once split, the input data will contain 70% of the positives and 70% of the negatives and the test data will contain 30% of the positives and 30% of the negatives. This ensures that the input and the test data reflect the positives and negatives proportion in the data set. The training data should have adequate number of positive and negative values to successfully build a model.

For more information on the test data and how it is used, see Evaluating Model Build Results, page 5-11.

The data mining engine uses the input data to discover relationships and patterns to build a set of rules. Depending upon the target field and data source selected, the application may examine the following:

- For a seeded data source, more than 150 customer attributes comprise the Oracle customer model (TCA). Refer the *Oracle Marketing Implementation Guide* for a complete list of attributes.

- A variety of customer attributes that contain customer information from a user-defined data source.

The attributes examined can include demographic information such as age, gender, and income. Historical data can include information such as the number of times a customer has been contacted, number of past purchases, and the number of service requests they have opened. It can also include data collected using your Customer Relationship

Management (CRM) applications, or data that you have purchased from outside vendors and imported into the database.

Different types of models are trained on different subsets of attributes depending upon the target audience. Here are some examples.

- A response model targeting organization contacts through a telemarketing campaign may examine data such as the number of employees in the organization, annual revenue, and business transaction history. A response model for a telemarketing campaign targeting individuals might instead examine detailed personal information such as age, household income, and personal transaction history.

- A loyalty/retention model will examine the attributes of customers who have and have not placed an order with your organization in the last three months.

- A customer profitability model will examine the financial attributes, role, and department of customers and whether a customer is a decision maker.

- A product affinity model will analyze a customer's past purchasing pattern for products or product categories to be able to predict the customer's affinity for the product or product category.

About Model Statuses

The status of a model indicates its state. The current status of a model determines whether or not you can use it for a build or a scoring run, modify it, copy it, or change its status.

The following table provides a description of each status, what the status can be reset to, what fields you can modify, and whether or not you can copy the model.

Model Status

Status	Meaning	Can be reset to	What you can modify	What you can copy
Draft	All new models have this status initially.	Archived (manually)	All fields.	Create an identical model with a different name and status of Draft.

Status	Meaning	Can be reset to	What you can modify	What you can copy
Scheduled	Model is scheduled to be built.	Draft by cancelling the build.	All fields.	Create an identical model with a different name and status of Draft.
Building	The application is in the process of building the model.	Draft by cancelling the build.	Training data is locked.	Create an identical model with a different name and status of Draft.
Failed	An error occurred while building or previewing the model.	Archived (manually)	View the model log, make the necessary changes. Preview or rebuild the model.	Create an identical model with a different name and status of Draft.
Invalid	The model was successfully built (status was Available), but cannot be used for scoring because changes were made to the training data. See Invalid below for more information.	Archived (manually)	Rebuild the model.	Create an identical model with a different name and status of Draft.

Status	Meaning	Can be reset to	What you can modify	What you can copy
Previewing	The training data has been submitted for previewing. If successful, the status is changed to Draft. If the preview fails, the status is changed to Failed. A request to build the model during this state terminates the preview.	Cannot be reset.	All fields.	Create an identical model with a different name and status of Draft.
Scoring	A scoring run is taking place.	Available by cancelling the scoring run.	Target population data is locked.	Create an identical model with a different name and status of Draft.
Available	Model is built and available for a scoring run. When rebuilding a model, the results of the previous build are purged.	Archived (manually)	All fields.	Create an identical model with a different name and status of Draft.
Expired	The model expires at the end of the date you enter in the Expiration Date field.	Cannot be reset.	Cannot be modified.	Create an identical model with a different name and status of Draft.

Status	Meaning	Can be reset to	What you can modify	What you can copy
Archived	Archived models only appear in the All Models list. The application automatically deletes the source data for the model.	Cannot be reset.	Cannot be modified.	Create an identical model with a different name and status of Draft.

Invalid

As stated in Table Model Status, page 5-8, a status of Invalid means that the model was successfully built, but that some change occurred after the build that has caused the status to change. The changes that can result in a status of Invalid are:

- A column in the data source is disabled or enabled for data mining.

- The training data selections are changed. For example:

    - Campaign activity selections are changed for a Response model

    - Workbooks, lists, or segment selections are changed for a Loyalty/Retention model

    - Attributes or workbook filters for training data sources are changed

    - Selection methods or record counts are changed

- When the status of a model is Invalid, it cannot be used for a scoring run. You can rebuild the model, and if the build is successful, the status will change to Available. You can then use it for a scoring run.

Evaluating Model Build Results

The accuracy of a model is determined by evaluating the results of the model build. The evaluation is performed by applying the set of rules created during the model build to the test data (30% of the total data made up of 30% of the positives and 30% of negatives).

Because the actual value of the target field for the test data is known, the predicted and actual values are compared to determine the effectiveness of the model.

One report and two charts are created during the evaluation. The following table describes what you can use each for.

Model Reports

Report or Chart	Use
Lift Chart, page 5-12	A graphical representation of the benefits of using the model over contacting your target population at random.
Performance Matrix Report, page 5-14	Provides statistical insight into the accuracy of the model build.
Attribute Importance Chart, page 5-15	Displays the predictive power of the customer attributes in determining the target value.

Based upon the information in these reports, you can make modifications to your data that will improve the predictive power of your model. See Improving Model Results, page 5-16.

About the Lift Chart

The Lift Chart illustrates the benefit of using a predictive model to intelligently select a portion of your target population as opposed to targeting the entire population at random. Targeting only the strong prospects allows you to reduce marketing costs and improve your return on investment.

The x axis, Percent Targeted, is the total target population. The y axis, Percent of Records, is the population exhibiting the target behavior. For a Response model, this indicates the percentage of positive responders. For a Loyalty/Retention model, this indicates the percentage of customers who have not placed an order within the last three months. For a Customer Profitability model, this indicates the percentage of profitable customers. For a Product affinity model, this indicates percentage of purchasers for a selected product or product category.

The following figure displays a sample lift chart.

A Sample Lift Chart

Name : <u>Sample Model</u>   **Last Build Date/Time** : 2004-Jan-12, 04:46 AM

Type : Loyalty/Retention   **Elapsed Build Time** : 0 Days, 0 Hours, 14 Minutes

Audience : Person DataSource

Lift Chart

The Lift Chart represents the benefits of using the predictive model over targeting customers at random.
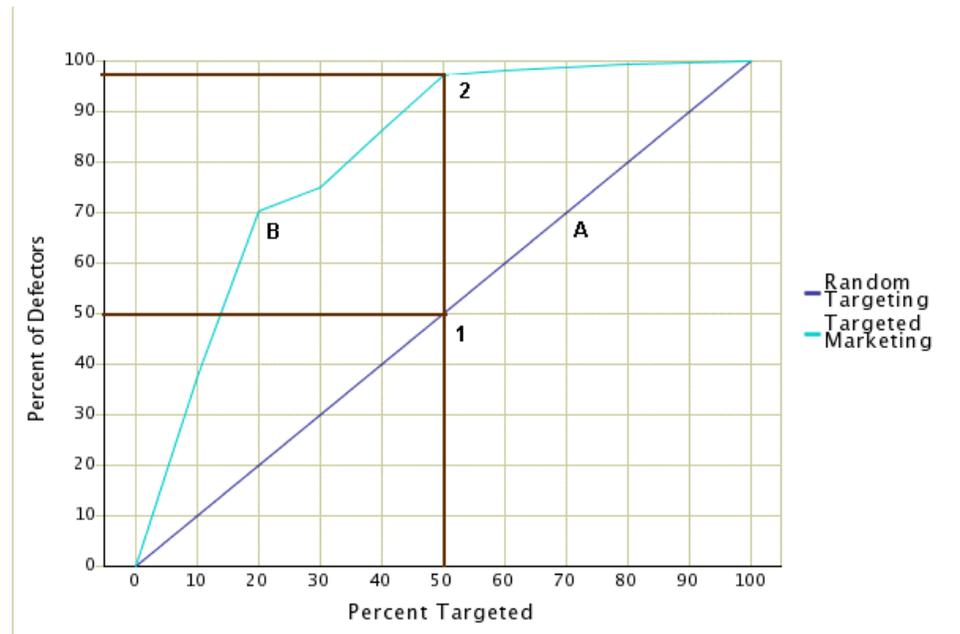
In the graph, the A and B lines represent the percentage of the total population (x axis) that you must target to reach the desired percentage of responders, purchasers, defectors, or profitable customers (y axis).

The curved line (B) is the lift. It indicates the advantage the model provides over targeting prospects at random. The more the line curves to the upper left hand corner of the graph, the more benefit you will achieve with the model.

Reading different points along the lines indicates what percentage of the total population you must target to meet your goal. In the Lift Chart in Figure 15–1, let us assume that our target population consists of 100,000 customers (x axis) and the total responders equal 5,000 (y axis). The intersection labeled 1 indicates that randomly contacting 50% (50,000) of your target population might yield a positive response rate of 50% (2,500). The intersection labeled 2 indicates that by using the predictive model, you can selectively target just 50% (50,000) of the population with the possibility of a 97% (4,850) response rate.

This outcome demonstrates the increase in campaign return on investment that may be achieved using predictive modeling.

You can also view a table reporting the lift chart details below the chart and can also download the data to a .csv file.

About the Performance Matrix Report

The Performance Matrix report (also referred to as a Confusion Matrix) provides statistical insight into the accuracy of the model. It displays information in two formats: as record counts, and as percentages. It rates the predictions made by the model against what actually occurred within the holdout sample of the training data.

The following figure displays a sample Performance Matrix Report.

A Sample Performance Matrix Report

Name : Sample Model   **Last Build Date/Time** : 2004-Jan-12, 04:46 AM
Type : Loyalty/Retention   **Elapsed Build Time** : 0 Days, 0 Hours, 14 Minutes
Audience : Person DataSource

Counts

The overall Accuracy Rate for the Model is 87.38 % (total % of correct predictions).

The overall Error Rate for the Model is 12.62 % (total % of incorrect predictions).

	Defectors	Non Defectors	Total
Predicted Correctly	11	79	90
Predicted Incorrectly	9	4	13
Total	20	83	103

Percentages

	Defectors	Non Defectors
Predicted Correctly	55.00 %	95.18 %
Predicted Incorrectly	45.00 %	4.82 %

As shown in the figure, the Counts table displays the number of correct and incorrect predictions the model made. For example, out of 90 responders, the model predicted 79 non defectors correctly and 4 incorrectly.

The Percentages table shows the overall accuracy rate of the model in percentage numbers. For example, the percentage of responders predicted correctly is 79/90 or 95.18%.

About the Attribute Importance Chart

The Attribute Importance chart displays the importance of the attributes in determining the target field value. It allows you to see which customer attributes have the most significant effect on the predictive capability of a model.

Attribute importance information can be displayed in three formats: as a pie chart, vertical bar chart, or a horizontal bar chart. Each slice of the pie chart is labeled with a percent; the total of the slices equals 100%. The bar charts indicate a numerical value for each attribute on the Y-axis. In the chart legends, the attributes are displayed in descending order of importance.

The following figure displays a sample Attribute Importance Chart.

A Sample Attribute Importance Chart

Important Attributes
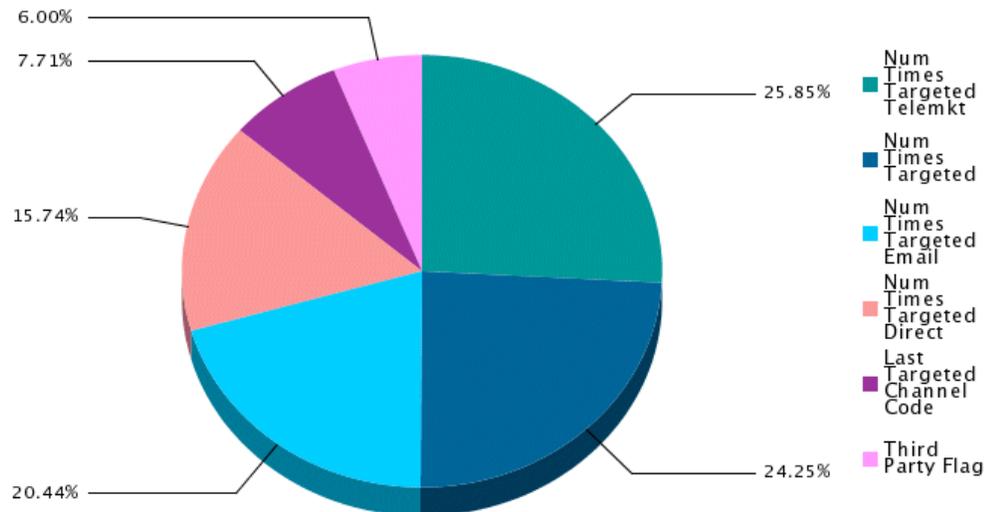
By default, only the top 10 attributes are displayed. You have the option of displaying additional or fewer attributes by entering a value in the Number of Attributes field.

Improving Model Results

After evaluating the model results, you can manipulate your training data in a number of ways to improve the predictive power of your model. You can:

- Increase the Size of the Training Data Set

  Larger sets of training data tend to produce more accurate results. While there is no minimum size, the training data set should include thousands if not tens of thousands of customers, prospects, or both for the best results.

- Improve the Quality of Customer Data

  If your data is missing many of the attributes, the models will still work, but will not be as accurate. Consider using other application products as these will

automatically fill in the required customer data. For a list of attributes used in models, refer *Oracle Marketing Implementation Guide*.

- Focus on Characteristics

  Choose a training data with characteristics that are as close as possible to the target population. The more similar the two populations, the better the predictive model.

- Split the Target Population

  Split the target population and build multiple specialized models. The more precisely you target your audience, the more precise your model will be. For example, a shoe retailer may wish to build a separate model for marketing to males and females because the two markets behave very differently. Another approach this retailer might take would be to build a separate model for different age groups: children, adults, and seniors.

Building a Model

This section provides step-by-step instructions on model building. Use the following procedures to build a model.

1. Create the model, page 5-17.

2. Schedule a build for a model, page 5-23.

3. View build results, page 5-23.

Creating the Model

Use the following information to create a model.

Navigation: Analytics > Models

Notes

- **Expiration Date:** Specify a date if you want your model to be available only for a specified period.

Next you will select the training data for your model. The training data can reside in the Oracle TCA or a user-defined data source. Proceed to do one of the following:

- Selecting Training Data For Response Models Using Seeded Data Sources, page 5-18

- Selecting Training Data for Loyalty/Retention Models Using Seeded Data Sources, page 5-18

- Selecting Training Data for a Customer Profitability Model Using Seeded Data

Sources, page 5-20

- Selecting Training Data for a Product Affinity Model Using Seeded Data Sources, page 5-21

- Selecting Training Data for Custom Models Using Seeded or User-Defined Data Sources, page 5-22

Selecting Training Data For Response Models Using Seeded Data Sources

Follow this procedure to select the training data for response models that will use an Oracle Marketing seeded data source. Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts.

Prerequisites

- The basic information for the model must be set up. See Creating the Model, page 5-17.

- You must know the name of the campaign and the campaign activity that contains the historical data that will be used to train your model.

- The population targeted by the historical campaign must have trackable similarities to the population you will target with your new campaign.

- The campaign must include both, responders and non-responders.

Navigation: Analytics > Models > Training Data

Notes

- To restrict the size of the training data, choose a Selection Method and/or specify minimum and maximum Record Count numbers. For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field. The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

- Preview: During the preview, the model status changes to Previewing and when the preview is complete, the model status changes to Draft.

- Monitor Preview: Click to view the progress of the training. If you find the green line moving downwards from a point, that is the point of failure of the training.

Selecting Training Data for Loyalty/Retention Models Using Seeded Data Sources

Follow this procedure to select the training data for loyalty/retention models that will use an Oracle Marketing seeded data source. Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts.

- The basic information for the loyalty/response model must be set up. See Creating the Model, page 5-17.

- The source for the training data must exist

- The training data must:
  - Include customers who have and who have not placed an order within the last three months

  - Be as similar as possible to your target population

  - Include demographic, transaction history, and account status information

  Navigation: Analytics > Models > Training Data

Notes
- The operations for the data sources can be:
  - Include: Include all the customer records in this source.

  - Exclude: Exclude all the customer records in this source from the previous sources.

  - Intersect: Use only the customer records common to this source and the previous sources.

  When using multiple training data sources, for the first data source selected, the Order must be 1 and Operation must be Include.

- To restrict the size of the training data, choose a Selection Method and/or specify minimum and maximum Record Count numbers. For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field. The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

- Preview: During the preview, the model status changes to Previewing and when the preview is complete, the model status changes to Draft.

- Monitor Preview: Click to view the progress of the training. If you find the green line moving downwards from a point, that is the point of failure of the training.

  Note: The application looks at each list and performs the include, exclude, and intersect operations in the order specified. For example, you specify three sources numbered 1, 2 and 3, with no size restrictions.

1. The application includes all of the records in source 1 in the training data set. We will call this the current training data.

2. It then compares the current training data with source 2. If the operation is exclude, the data is modified to consist of the records unique to source 1 only. This set of records is now the current training data.

3. Finally, the application compares the current training data with source 3. If the operation is intersect, it modifies the data to consist of only the records that are common to both sets (in other words, the results from step 2 and source 3.)

Selecting Training Data for a Customer Profitability Model Using Seeded Data Sources

Follow this procedure to select the training data for customer profitability models that will use an Oracle Marketing seeded data source. Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts.

Prerequisites

- The basic information for the Customer Profitability model must be set up. See Creating the Model, page 5-17.

- The source for the training data must exist

- The training data must:

    - Include customers who have and who have not placed an order within the last three months

    - Be as similar as possible to your target population

    - Include demographic, transaction history, and account status information

Navigation: Analytics > Models > Training Data

Notes

- The operations for the data sources can be:

    - Include: Include all the customer records in this source.

    - Exclude: Exclude all the customer records in this source from the previous sources.

    - Intersect: Use only the customer records common to this source and the previous sources.

When using multiple training data sources, for the first data source selected, the Order must be 1 and Operation must be Include.

- To restrict the size of the training data, choose a Selection Method and/or specify minimum and maximum Record Count numbers. For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field. The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

- **Preview:** Click to preview the record count, number of positive responses, and the percent of positive responses. During the preview, the model status changes to Previewing and when the preview is complete, the model status changes to Draft.

- **Monitor Preview:** Click to view the progress of the training. If you find the green line moving downwards from a point, that is the point of failure of the training.

Selecting Training Data for a Product Affinity Model Using Seeded Data Sources

Follow this procedure to select the training data for customer profitability models that will use an Oracle Marketing seeded data source. Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts.

Prerequisites

- The basic information for the Product Affinity model must be set up. See Creating the Model, page 5-17

- The source for the training data must exist

- Target product categories and products must exist

- The training data must:

  - Include customers who have and who have not placed an order within the last three months

  - Be as similar as possible to your target population

  - Include demographic, transaction history, and account status information

Navigation: Analytics > Models > Training Data

Notes

- The operations for the data sources can be:

  - Include: Include all the customer records in this source.

  - Exclude: Exclude all the customer records in this source from the previous

sources.

- Intersect: Use only the customer records common to this source and the previous sources.

When using multiple training data sources, for the first data source selected, the Order must be 1 and Operation must be Include.

- To restrict the size of the training data, choose a Selection Method and/or specify minimum and maximum Record Count numbers. For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field. The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

- **Preview:** Click to preview the record count, number of positive responses, and the percent of positive responses. During the preview, the model status changes to Previewing and when the preview is complete, the model status changes to Draft.

- **Monitor Preview:** Click to view the progress of the training. If you find the green line moving downwards from a point, that is the point of failure of the training.

Selecting Training Data for Custom Models Using Seeded or User-Defined Data Sources

To select training data for a custom model from the Oracle customer model (TCA) or a user-defined data source, follow the steps below.

Prerequisites

- The basic information for the custom model must be set up. See Creating the Model, page 5-17

- The source for the training data must exist

- The training data must be as similar as possible to your target population

Navigation: Analytics > Models > Training Data

Notes

- To restrict the size of the training data, choose a Selection Method and/or specify minimum and maximum Record Count numbers. For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field. The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

- **Preview:** Click to preview the record count, number of positive responses, and the percent of positive responses. During the preview, the model status changes to Previewing and when the preview is complete, the model status changes to Draft.

- **Monitor Preview:** Click to view the progress of the training. If you find the green line moving downwards from a point, that is the point of failure of the training.

Scheduling a Build for a Model

Use the following information to schedule a build for your model.

PrerequisitesFor all model types, the model must exist and the training data set must be specified, including any restrictions on the training data size.

Navigation: Analytics > Models > Build

Notes

- Model building may impact system performance. Therefore, consider scheduling builds for off-peak hours.

- You can check the status field for the model to ascertain when the model building is complete. If the build was successful, the status changes to Available.

Viewing Build Results

Use the following information to view the build results for your model.

Prerequisites

- The model must exist

- The training data set must be specified, including any restrictions on the training data size

- Model should have been built and in Available status

Navigation: Analytics > Models

Notes

- Navigate to Results > Lift Chart to view the benefits of using the predictive model over targeting customers at random. The information is displayed both, as a lift chart and a table.

- Navigate to Results > Performance Matrix to view the predictive model's accuracy in making predictions.

- Navigate to Results > Attribute Importance and select the chart type and number of attributes you want to view in the chart. The chart helps you measure the customer attributes that have the highest predictive power.

Understanding Scoring Runs Generation

Scoring is the process of using a model to predict the future behavior of a specific

population based on the attribute values of individual customer records. The score assigned to a customer or prospect indicates the likelihood that they will exhibit the desired behavior.

Because of budget, resource, or other constraints, you may need to restrict the size of the list you are scoring and specify a minimum and a maximum size for it. You may also choose to score the target population immediately or specify a date and time when the scoring should execute.

After scoring, the target population is divided into ten continuous segments called deciles. Each decile represents a certain number of customers, prospects, or both. The sum of the record counts in each decile equals the total target population. The deciles are ordered from the highest to the lowest probability of displaying the target behavior. Therefore, the customer records in decile 1 are the most likely to exhibit the behavior you are interested in.

Based on this information, you can select the groups with the highest probability of exhibiting a target behavior and generate a list. The list can then be used for marketing activities such as executing an e-mail campaign. Campaign execution closes the loop of using a predictive model to score a target population and generate a list of customers or prospects that are most likely to exhibit the target behavior.

You can also perform an Optimal Targeting analysis and then generate an optimal list of people to target for your marketing activities. See Optimal Targeting Analysis, page 5-26 for the details of Optimal Targeting analysis.

Once you have generated a list, you can access it from Audience Workbench. To view the actual names on the list and other related details, click the Entries link.

For more information about lists, see Creating a List Using Natural Language Query, page 4-8 and Using Target Groups, page 11-20.

An example of the scoring run results for a Response model is shown in the following table. The table Scoring Run Report, page 5-25 provides a description of each column in the scoring run results table.

Scoring Run Results

Decile	Propensity to Respond*	Number of Records	Percent of Positive Values	Include in List
1	90-100%	1560	26.54	x
2	80-89.99%	183	3.11	x
3	70-79.99%	87	1.48	x
4	60-69.99%	48	.82	x

Decile	Propensity to Respond*	Number of Records	Percent of Positive Values	Include in List
5	50-59.99%	45	.77	-
6	40-49.99%	78	1.33	-
7	30-39.99%	231	3.93	-
8	20-29.99%	183	3.11	-
9	10-19.99%	261	4.44	-
10	0-9.99%	3,201	54.47	-

* Propensity to Respond is displayed for Response model types. For Loyalty/Retention models, this column is labeled Propensity to Defect; for Customer Profitability model it is labeled Profitability; for Product Affinity model it is labeled Propensity to Purchase; for Custom models it is labeled Propensity for Positive Target Values.

The following table describes each of the columns on a scoring run report.

Scoring Run Report

Column	Description
Decile	Each number represents a group of customers, prospects or both. The deciles are ordered by the probability of response, from the highest to the lowest. The first decile represents group members with a 90-100% likelihood of exhibiting the target behavior; the second decile includes those who are 80-89.99% likely to respond to your campaign; and so on.

Column	Description
Propensity to Respond (Response models) Propensity to Defect (Loyalty/Retention models) Propensity to Purchase (Product Affinity model) Propensity to be Profitable (Customer Profitability model) Propensity for Positive Target Values (Custom models)	The probability that persons or organization contacts (customer records) in the decile will exhibit the target behavior. Select the deciles with the highest predicted probabilities for your list. For a Loyalty/Retention model, the percentages represent how likely the members of each decile are to defect to a competitor. For a Product Affinity model, the percentages represent the likelihood that members will purchase the specified product. For a Customer Profitability model, the percentages represent how profitable to you the customers will be.
Number of Records	The number of records in the decile.
Percent of Positive Values	A percentage representation of the number of records in the decile to the total number of records.
Include in List	This column contains a check box for each decile. The check boxes allow you to select the customer records in a particular decile and include them in a list.

You can associate attachments, notes, and tasks to a scoring run and add users and teams to allow them access to the scoring run.

Related Topics

Optimal Targeting Analysis, page 5-26

Generating a Scoring Run, page 5-28

Optimal Targeting Analysis

If you have costs or budget constraints for your marketing activities, the build results from a model may not be adequate for arriving at an optimal target list. You can use the Optimal Targeting Analysis functionality and perform an analysis of the costs, revenues, and scored response probabilities of the population for a test campaign and derive the expected gross profit per customer. The result of this analysis is presented as

an Optimal Targeting Chart.

Navigation: Campaign Workbench > Predictive Analytics > Select a model > Click Scoring Run to view details > in the side navigation Results: Optimal

Notes

- Optimal Targeting Analysis is only available for the Response and Product Affinity models.

- **Profit Chart Display Type:** The chart considers revenue and shows greater profit for a larger target audience. It does not consider the costs involved in increasing the target audience.

- **Return on Investment Chart Display Type:** The chart considers the costs involved in a larger target audience and displays the optimum number of targeted customers to maximize the return on investment.

The X-axis of the Optimal Targeting Chart represents the total target population and the Y-axis represents the expected Return On Investment (ROI) or Profits for the campaign. The highest Y-axis value on the chart determines the optimal number of customers to target. In the following figure, it is seen that the optimal percent of customers to target is about 14%. You can modify the costs, margins per order, and costs per customer details and arrive at optimal ROI and profits.

A Sample Optimal Targeting Return On Investment Chart
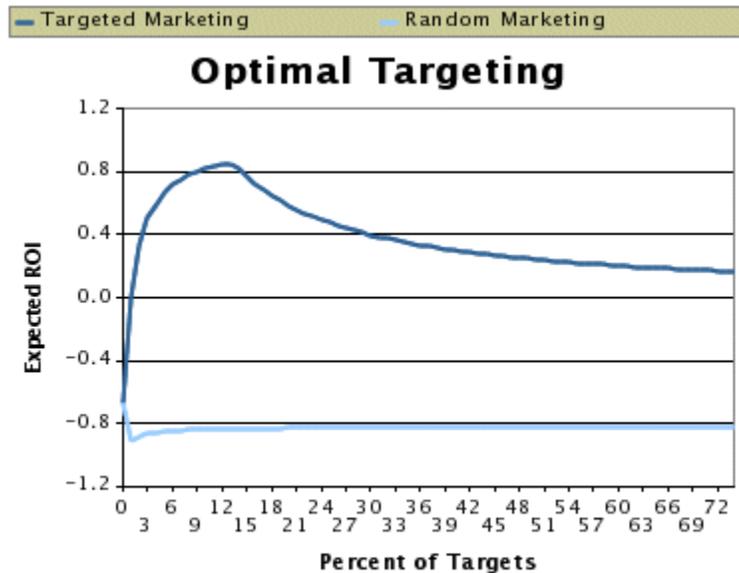
The optimal number of customers to target is 26 out of 147.

You can perform optimal targeting analysis for scored response probabilities of Response and Product Affinity models where targeted customers will place orders and

you can easily identify the costs and revenues per customer. However, for Loyalty/Retention and Customer Profitability models, customers do not place orders and so identifying the costs and revenues per customer for optimal targeting analysis is not possible. The purposes of these models is to identify the profitable customers or arrive at marketing strategies to build up and retain customers. For example, in a call center, telemarketing executives may be instructed to assign higher priority to calls from profitable customers.

Once the optimal targeting chart is generated, you can generate an optimal list to target for a campaign activity. An optimal list may be associated with campaign activities in the Draft or Active statuses. You can restrict the size of the optimal list to within a budget amount or to the top x% of targets.

If a campaign activity already has a target group defined, then the entries in the optimal list generated are added to the target group. If no target group has been defined for a campaign activity, then a new target group is created with the entries of the optimal list.

Related Topics

See the Performing an Optimal Targeting Analysis and Generating an Optimal List topic in Generating a Scoring Run, page 5-28.

Generating a Scoring Run

The scoring process looks at the data mining attribute values for each member (customer record) of the target population. It then scores each record based on how likely that member is to exhibit the target behavior. The application then divides the population into 10 groups called deciles based on the score given to the record.

As part of the scoring process, costs and revenues for a customer can also be analyzed to arrive at optimal targeting data.

When the scoring is complete, you can generate a list by selecting the deciles (customer records) with a high likelihood of exhibiting the target behavior or by using the results of an optimal targeting analysis. The list would then be targeted in a future marketing campaign.

Use the following procedures to generate a scoring run.

- Creating a Scoring Run, page 5-29

- Selecting Target Population When Using a Seeded Data Source, page 5-29

- Selecting a Target Population When Using a User-Defined Data Source, page 5-30

- Scheduling a Scoring Run, page 5-31

- Viewing Scoring Run Results, page 5-31

- About Scoring Run Statuses, page 5-31

- Generating a List Based on Decile Scores, page 5-33

- Performing an Optimal Targeting Analysis and Generating an Optimal List, page 5-34

- Viewing Logs, page 5-34

Creating a Scoring Run

Navigate to Analytics > Models and Analytics > Scoring Runs to create a scoring run.

Prerequisites: A model that has been built and is in the Available status

To download the list of scoring runs to a .csv file, click the Download to CSV file icon, click Save in the File Download dialog box, navigate to a relevant folder, and save the .csv file.

Selecting Target Population When Using a Seeded Data Source

Your data source is seeded if it is listed as TCA Persons or TCA Organization Contacts. Use the following information to select seeded data sources for scoring.

Prerequisites: A scoring run must be created for a model

Navigation: Analytics > Scoring > Selections

Notes

- The operations for the data sources can be:

    - Include: Include all the customer records in this source.

    - Exclude: Exclude all the customer records in this source from the previous sources.

    - Intersect: Use only the customer records common to this source and the previous sources.

    When using multiple training data sources, for the first data source selected, the Order must be 1 and Operation must be Include.

    > **Note:** The application looks at each list and performs the include, exclude, and intersect operations in the order specified. For example, you specify three sources numbered 1, 2 and 3, with no size restrictions.
    >
    > 1. The application includes all of the records in source 1 in the target population set. We will call this the current target population.

2. It then compares the current target population with source 2. If the operation is exclude, the data is modified to consist of the records unique to source 1 only. This set of records is now the current target population.

3. Finally, the application compares the current target population with source 3. If the operation is intersect, it modifies the data to consist of only the records that are common to both sets (in other words, the results from step 2 and source 3.)

- To restrict the size of the scoring data, choose a Selection Method and/or specify minimum and maximum Record Count numbers. For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field. The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

- **Preview:** During the preview, the scoring run status changes to Previewing. When the preview is complete, the scoring run status changes to Draft.

- **Monitor Preview:** Click to view the progress of the scoring run. This will help you trouble shoot if the run fails. If you find the green line moving downwards from a point, that is the point of failure of the scoring run.

Selecting a Target Population When Using a User-Defined Data Source

For a user-defined data source, you can use a combination of attributes and Discoverer Workbook filters to restrict the size of your target population. If no filters are specified, the scoring run will select and score all of the records in the data source.

Use the following information to select a target population from a user-defined data source.

Prerequisites: A scoring run must be created

Navigation: Analytics > Scoring Runs > Selections

Notes

- To restrict the size of the scoring data, choose a Selection Method and/or specify minimum and maximum Record Count numbers. For example, to select records starting from the top down until some maximum number is reached, select Top Down and enter a value in the Maximum field. The system applies the Selection Method criteria before the Record Count criteria. If a conflict occurs, the Record Count criteria takes precedence.

- **Preview:** During the preview, the scoring run status changes to Previewing. When the preview is complete, the scoring run status changes to Draft.

- **Monitor Preview:** Click to view the progress of the scoring run. This will help you trouble shoot if the run fails. If you find the green line moving downwards from a point, that is the point of failure of the scoring run.

Scheduling a Scoring Run

Use the following information to schedule the scoring run.

Prerequisite: A scoring run for a model must exist

Navigation: Analytics > Scoring Runs > Score

- Scoring runs may impact system performance. Therefore, consider scheduling scoring for off-peak hours.

- **Monitor Scoring:** Click to view the progress of the scoring. If you find the green line moving downwards from a point, that is the point of failure of the scoring.

Viewing Scoring Run Results

Use the following information to view the results of a scoring run. For information on scoring run statuses, see About Scoring Run Statuses, page 5-31

Prerequisites: The scoring run must be in the Completed status.

Navigation: Analytics > Scoring Runs > Results

Notes

- Each decile represents a portion of the target population and indicates the likelihood that they will exhibit the target behavior.

About Scoring Run Statuses

The following table describes the seeded statuses for scoring runs, and tells you:

- The meaning of each status

- What status the scoring run can be changed to

- What fields you can modify

- If you can copy scoring runs with that status

Scoring Run Statuses

Status	Meaning	Can reset to	What you can modify	What you can copy
Draft	Initial status for all scoring runs.	Archived (manually)	All fields.	Create an identical scoring run with a different name and status of Draft.
Scheduled	The scoring run is scheduled.	Draft by cancelling the scoring run.	All fields.	Create an identical scoring run with a different name and status of Draft.
Running	The application is in the process of scoring the target population.	Draft by cancelling the scoring run.	Data selections are locked.	Create an identical scoring run with a different name and status of Draft.
Invalid	A scoring run that completed successfully (status was Completed) has been invalidated.	Archived (manually)	All fields.	All scoring run fields are locked and cannot be modified.
Failed	An error occurred while generating or previewing a scoring run. View the log, make the necessary changes, and resubmit it for a run or preview.	Archived (manually)	All fields.	All scoring run fields are locked and cannot be modified.

Status	Meaning	Can reset to	What you can modify	What you can copy
Previewing	The run has been submitted for previewing. If the preview is: - successful, the status changes to Draft. - unsuccessful, the status changes to Failed. A request to score will terminate the preview operation.	Scheduled by setting up a run time.	All fields.	Create an identical scoring run with a different name and status of Draft.
Completed	The scoring run finished and was successful.	Archived (manually)	All fields.	Create an identical scoring run with a different name and status of Draft.
Archived	Archived scoring runs appear only in the All Scoring Runs list. The application automatically deletes any source data for the scoring run.	Cannot be reset.	Data selections are locked.	Create an identical scoring run with a different name and status of Draft.

Generating a List Based on Decile Scores

Use the following information to use the deciles from the scoring run to generate a list.

Prerequisite: The scoring run must be in the Completed status

For more information on scoring run statuses, see About Scoring Run Statuses, page 5-

31.

Navigation: Analytics > Scoring Runs

Notes

•   A decile represents a portion of the target population and indicates the likelihood that they will exhibit the target behavior.

•   To generate a list, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

Performing an Optimal Targeting Analysis and Generating an Optimal List

Use the following information to use the deciles from the scoring run to generate a list.

Prerequisite: The scoring run must be in the Completed status

For more information on scoring run statuses, see About Scoring Run Statuses, page 5-31.

Navigation: Analytics > Scoring Runs

Campaign Activity: Only those campaign activities whose target groups have been created using the Advanced option of the audience workbench will be available for selection.

To generate a list, the Workflow Background Process must be running. See your System Administrator or refer to the *Oracle Marketing Implementation Guide* for more information on the Workflow Background Process.

Viewing Logs

For Data Mining, the log sequentially summarizes the back-end process occurs during model builds and scoring runs. If your build or scoring run fails, you can view the log to help determine the cause of the failure. Log entries are listed in ascending order.

6

Searching and Accessing Initiatives

This chapter covers the following topics:

- Searching for a Marketing Object
- Personalizing Views in the Workbenches

Searching for a Marketing Object

You can search for a marketing object using a saved search or performing a quick search.

Using Saved Searches

Saved Searches are searches where the parameters are already provided. For example, if you frequently search for a list of campaigns that were run during the last year in the United States, then you would provide all the required parameters for such a search, and save it. The next time you want to see the results, all you have to do is run the saved search.

The following information will help you create a saved search for a campaign. You can similarly create saved searches for programs, activities, predictive models, and lists. The navigation is dependent on the object you are creating a saved search for.

To create a saved search for a list of campaigns run in the United States during the year 2003, use the following information.

Navigation: Campaign > Campaigns > Personalize

Notes

- Click **Modify Criteria,** select the attributes you wish to include, and set the following values for the respective attributes:

    - Country: United States

    - Start Date: January 1, 2003

- End Date: December 31, 2003

- Type: Campaigns

- Specify the scope of your search in the Filter search by region.

- Select the columns that should be displayed in the search results in the Display Options region.

- To use a Saved Search, select it in the Saved Searches list and click **Search**.

Using Quick Search

Using the Quick Find list in the Campaign Dashboard and the Overview pages, you can select the object you wish to locate and enter a search criteria. For example, to locate campaigns that begin with the capital letter C, enter "C%" in the search criteria text box.

Personalizing Views in the Workbenches

In the Audience and Campaign workbenches, you can modify what is displayed in the summary, and how the information is displayed by personalizing the view. For example, the Audience Workbench has the List Effectiveness View. You can personalize this view by choosing different options. You can also create a view.

The Personalize feature provides the following options:

- **General Properties:** You can change the name of the view, specify the number of rows to be displayed in a tabular summary, and provide a description for the view.

- **Column Properties:** You can choose the columns to display in the tabular summary, and the order in which they should appear.

- **Sort Settings:** You can choose three columns to sort on, and specify the sort order.

- **Search Query:** You can specify the query based on which the summary is displayed.

In the Campaign Workbench, The Last N Days view captures how many days in the past we have to go to see if an Activity was available at that time. The seeded queries, My Activities and All Activities are shipped with a value of 30, indicating that only those activities that had start date or end date within the last 30 days or 30 days into the future will be shown. When you define new personalization criteria, you should use this field to limit searches. For activities with null end date, the parent Campaign's end date is considered as its end date.

7

Planning and Using Marketing Programs

This chapter covers the following topics:

- Programs Overview
- Creating a Program
- Adding Components to a Program
- Program Statuses

Programs Overview

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

The following figure depicts that in a hierarchy of marketing objects, a program is at the top. All other objects, such as campaigns, events, or even other programs can be a part of a program.
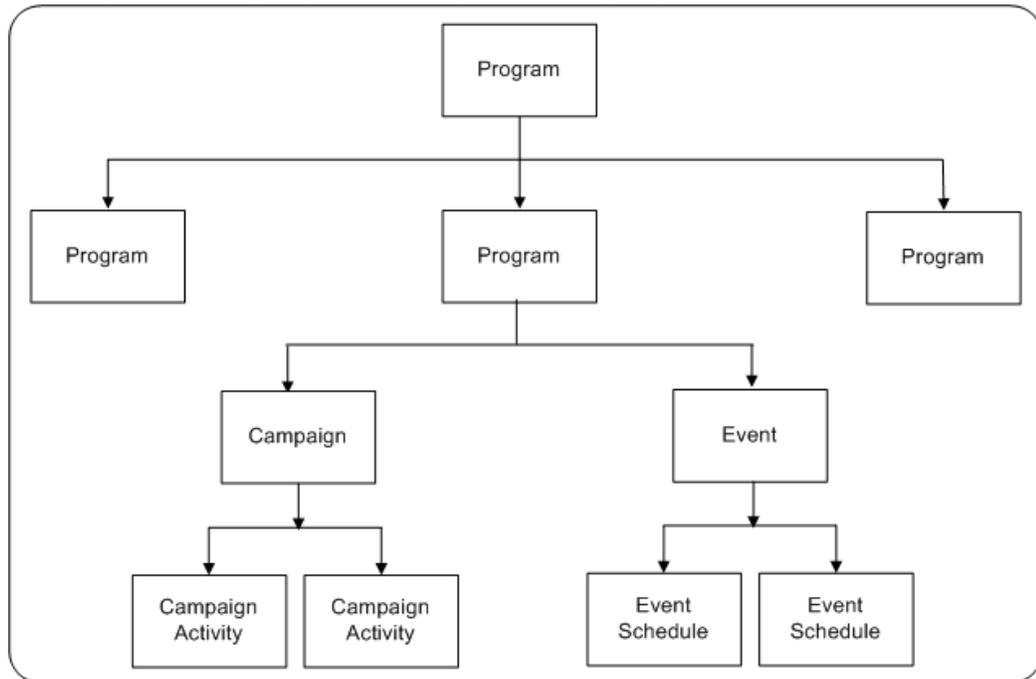
Parent Program

A program can be or have a parent program. For example, you want to launch a marketing channel for a product launch in America, Europe, and Asia Pacific. Accordingly, programs with a customized set of campaigns and events addressing specific interests based on geography are created. All these programs can be grouped under a single program called GlobalLaunch, as depicted in the following figure. In this example, program GlobalLaunch is a parent program.

Parent and Child Programs
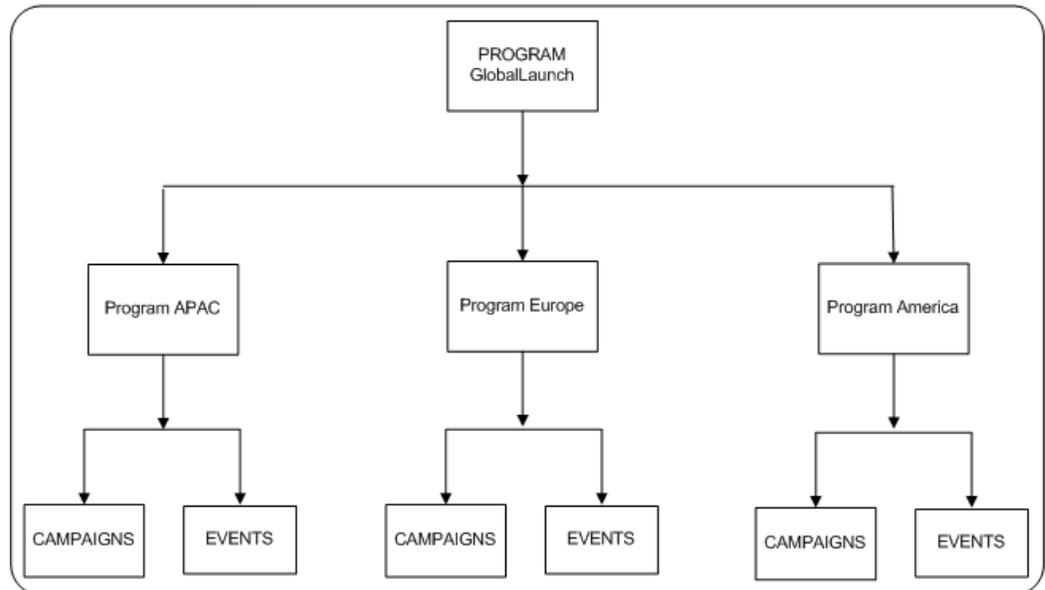
Messages in a Program

A message can be defined as the overall theme or communication that is being pushed through the execution channels and is a high level communication paradigm. An example would be "Know More, Do More, Spend Less With Oracle Applications".

Costs, Revenues, and Metrics

A program's costs, revenues, and metrics are based on the costs, revenues, and metrics associated with the individual components of the program, such as campaigns, campaign activities, events or event activities. These are rolled up to display the program's costs, revenues, and metrics.

Creating a Program

Use the following information to create a program.

Notes

- **Owner:** This field defaults to the person who is currently logged into the application.

- **Start and End periods:** If the start and end period is chosen from a LOV, the start and end dates are entered automatically.

- **Global check box:** Select if the program is across geographies.

- **Confidential check box:** Select to restrict access to this program to members within your team till the program is in the Active status. Select the individual members or teams to grant access to using the Team side navigation link.

Adding Components to a Program

Use the Components side navigation link to add various marketing objects to a Program. Components include campaigns, events, and one-off events.

Program Statuses

The following diagram shows how the status of a program changes.
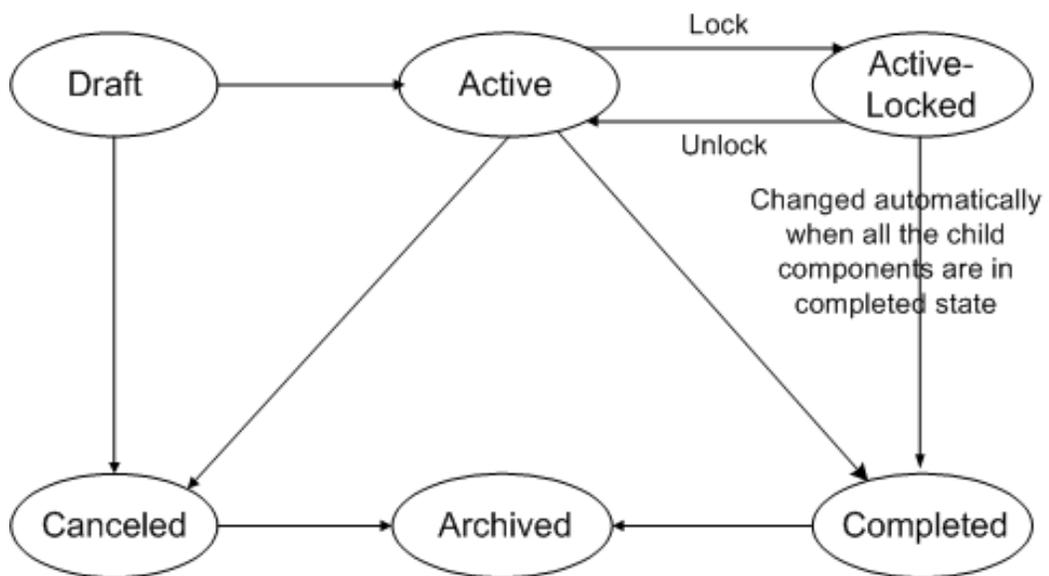
The draft program can be canceled or become active. The active program can be locked. The program changes to completed when all the child components are completed. It can then be archived.

8

Creating and Using Campaigns

This chapter covers the following topics:

- Campaigns Overview
- Creating a Campaign
- Setting Up Campaigns
- Sourcing Budgets for a Campaign
- Associating Costs, Revenues, and Metrics to a Campaign
- Understanding Campaign Execution

Campaigns Overview

One of the biggest challenges for business managers is to envision and develop marketing programs for their products and services. To meet such a challenge, you can create and execute marketing activities with specific themes and goals.

In Oracle Marketing, a campaign is a collection of marketing activities designed to support a goal. A campaign is the vehicle for putting out information about an organization's products, services, offers, and messages to existing and potential customers.

Marketing campaigns consist of the campaign and its activities. An activity determines when, where, and how a specific marketing message is delivered. A particular campaign may have multiple activities that execute through different marketing channels.

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

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

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

Through its life cycle, a campaign goes through a number of status transitions: New, Pending Theme Approval, Planned, Pending Budget Approval, Active, and so on. For more details, refer *Oracle Marketing Implementation Guide*.

Campaign Processes

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

A campaign in Oracle Marketing is a planning tool and to execute it, you can create campaign activities. A basic marketing campaign can be divided into several processes as depicted in the following figure.

Campaign Planning and Execution
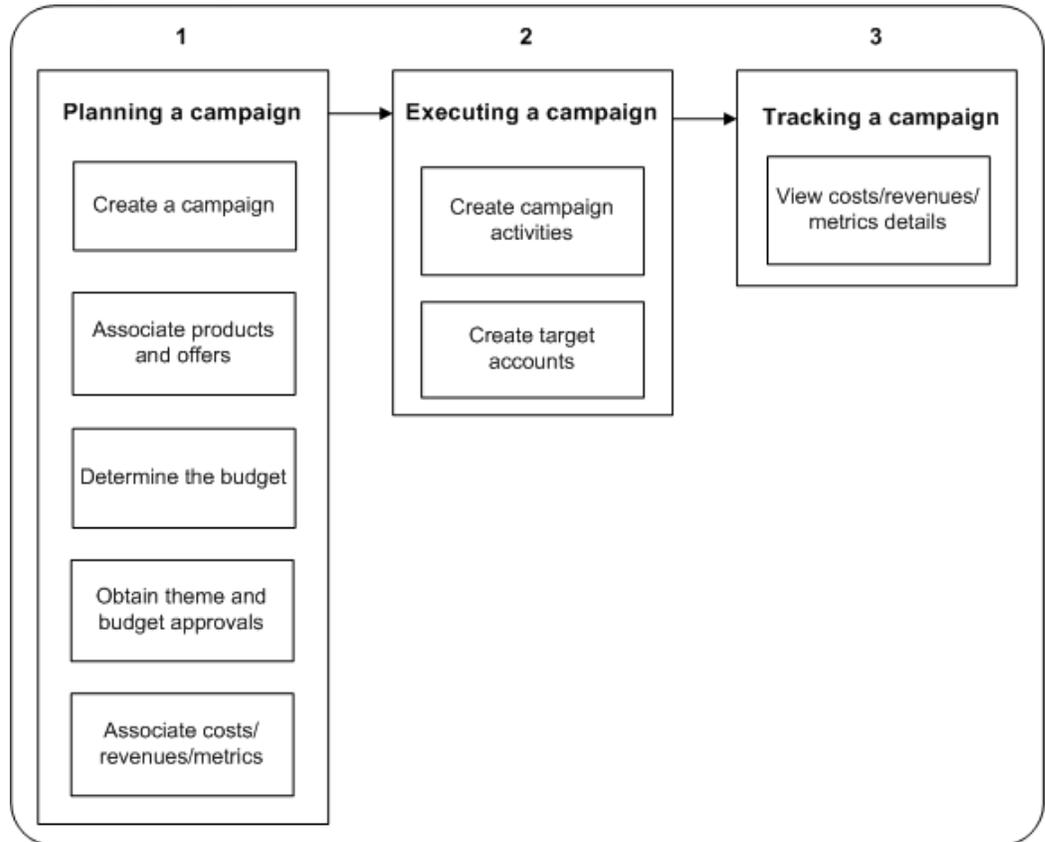
The logical process flow for a campaign is as follows:

1. Planning a Campaign, which includes:

    • Creating the campaign

    • Associating products and offers

    • Determining the budget

    • Obtaining concept and budget approvals

    • Associating costs, revenues, and other metrics

2. Executing a campaign, which includes:

    • Creating a campaign activity by selecting channels and setting dates

    • Creating a target list

- Arranging collateral

3. Tracking a campaign, which includes

   - Viewing costs, revenues, and other metrics

The campaign statuses reflect the location of the campaign in the process, as shown in the following diagram. The campaign is a draft until the theme is approved, at which time it becomes planned. When the budget is approved, the campaign is available and can be manually or automatically made active. When the campaign is completed it can be closed and archived.

Campaign Statuses
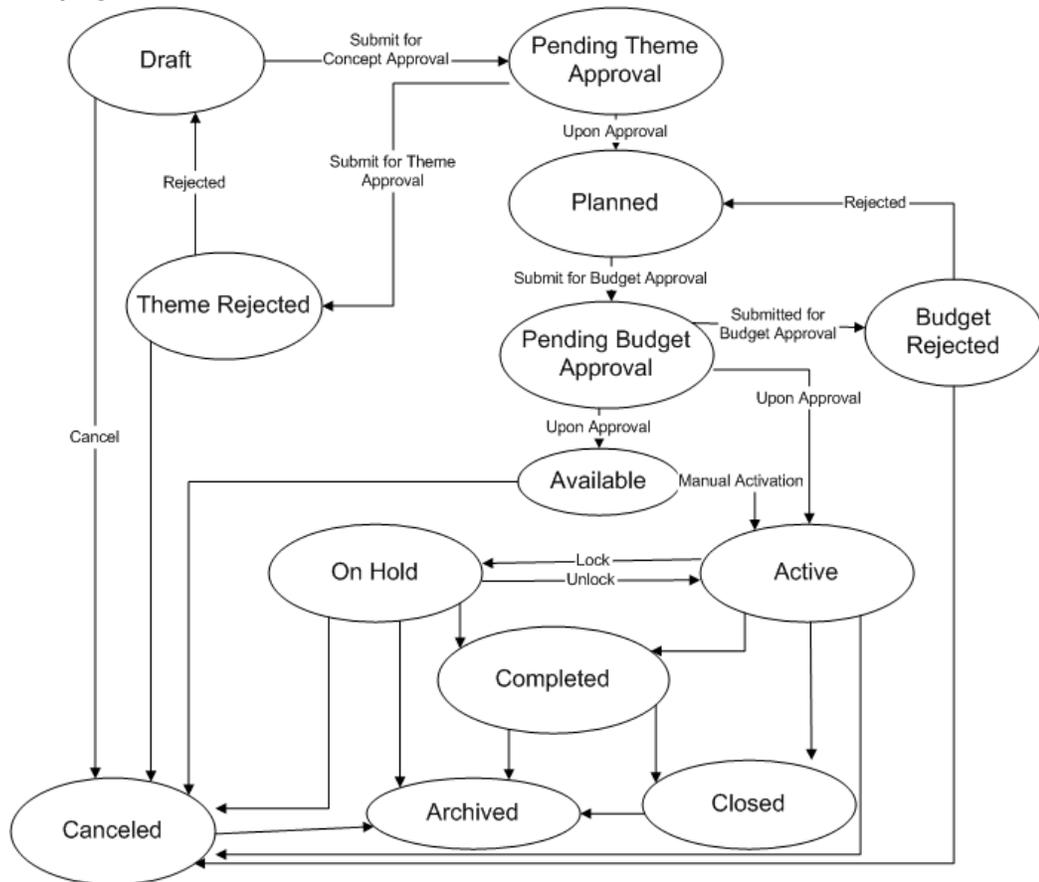
Creating a Campaign

To speed up campaign creation, your new campaign is based either on a campaign template or on an existing campaign (which also uses a template).

Notes for Copying an Existing Campaign

- You can find the campaign that you want to copy in the Campaigns List and click Copy. The Create Campaign page opens with the selected campaign information.

- **Campaign Name**: If you do not select a campaign first, then select Copy for Create Method in the Create Campaign page and use the LOV to find the campaign to copy. The LOV displays active campaigns that you have access to. The same becomes Copy of (selected campaign). You can then change it to another unique name.

- **Source Code**: The source code is a unique identifier used to track all transactions against the campaign. If you do not enter a source code, then the system generates it.

- **Parent Program**: The parent program is optional for campaigns. The parent program of the copied campaign appears if it is not canceled or archived, and if the end date is not in the past. The business unit and confidential flag are inherited from the parent program.

- **End Date**: The end date defaults to the end date of the parent program. If there is no parent program, then the end date is calculated based on the duration of the copied campaign and the current date as the start date.

- **Coordinator**: You are the defaulted coordinator.

- **Objective**: Each campaign needs its own unique objective description.

- **Components to copy**: All campaign associations are listed and selected to be copied to the new campaign: additional information, activities, offering (products only), and partners. You can change the selections.

- **Activities to copy**: All activities related to the copied campaign that are not canceled are available to select for the new campaign. You can, however, select a canceled activity to the copy using the Create Activity page.

Notes for Creating a New Campaign

- **Create Method**: Select New.

- **Type**: You can create different types of campaigns, such as trade promotions campaigns, collections campaigns, or partner campaigns. The selected type determines your choice of templates.

- **Template**: The template dictates the associations that must be defined to complete the campaign setup. The template must have an active status.

- Name: Provide a unique name for the campaign.

- **Source Code**: The source code is a unique identifier used to track all transactions against the campaign. If you do not enter a source code, then the system generates it.

- **Parent Program**: The parent program is optional for campaigns. If the campaign is part of a higher level marketing program, then it should roll up to the parent program for tracking purposes. The business unit and confidential flag are inherited from the parent program. You can later change the confidential flag.

- **Start and End Dates**: The start date defaults to the current date. If a parent program is selected, then the end date defaults to the end date of the parent program, and the dates must fall within the date range of the parent.

- **Coordinator**: The person who is responsible for managing the campaign. Your name is the default. You can select any marketing resource from the resource LOV.

- **Objective**: Each campaign needs its own unique objective description.

When your copy or create completes, the details page appears and you can view and update all the details and associations.

Related Topics

Setting Up Campaigns, page 8-6

Setting Up Campaigns

The campaign is the main planning instrument for marketing actions. Campaign planning includes identification and definition of the target market with the key issues to address for the identified target segment, definition of solutions to address these issues, formulation of the right marketing message to deliver, communications plan to reach the target segment with this message, and finally the execution plan to deliver the message via appropriate channels.

Notes

- Select an existing campaign to view and update the details of the campaign and all of its associations dictated by the campaign template.

- **Summary View**: View all the related information on one page and print it.

- The header information for the campaign can or cannot be updated based on the rules set up by your administrator.

- When all changes are complete, click **Submit for Approval** if the campaign requires approval, or click **Activate** if no approval is required.

  If you are the approver for the campaign, or no approval is needed, then the status

immediately becomes Active. If you are not the approver but approval is required, then you can review the approvers and submit for approval. Click **View Approval** to check the approval status.

- **Activities tab**: You can view a list or Gantt chart of all activities for the campaign. You can also add new activities and drill down to the activity details to view or make changes.

- **Offering tab**: Optionally associate products and product categories promoted by the campaign. Only valid (not expired) products and categories can be associated to a campaign. This information is used in reporting to generate information such as "how many campaigns were executed to promote Product X".

    Primary Category: This is useful for reporting purposes when multiple product families are associated with a campaign.

    You can also optionally add offers that were created in Oracle Trade Management to the campaign.

- **Budget tab**: The campaign manager or finance manager can optionally enter the budget estimate and change it until the campaign becomes active. The default is the total forecast cost. Click Manage Budget to open the Budget Cue Card page and review budget activity, create a request or transfer, or access the campaign budget checkbook. See Sourcing Budgets for a Campaign, page 8-8.

- **Collaboration tab**: Any content stored in Oracle Content Management that is in progress or approved and to which you have access, can be added to the campaign so that all team members can see the same documents. Collaboration items can be added and removed even after the campaign is activated.

    You can also add notes and tasks for the campaign on this tab.

- **Tracking tab**: Use this tab to review the performance of the campaign using various metrics and monitors. See Associating Costs, Revenue, and Metrics to a Campaign, page 8-8.

- **Access tab**: You can add marketing team members to work on the campaign and designate whether each has access to financial (metric) information. You also designate whether or not the campaign is visible read-only to all marketing users (confidential flag). This setting is inherited from the parent program, but can be changed.

- **Partners tab**: Optionally, associate partners with the campaign.

- **Additional Information tab**: You can select a related event only for an Event Promotion campaign. Segments apply only for Collections campaigns and must be enabled by the system administrator. Global indicates that the campaign will be executed globally and the global source code will be used for reporting.

Sourcing Budgets for a Campaign

To source funds for a campaign, you can associate a campaign to a budget. Using this information, the initial estimate can be communicated to approvers during the approval process.

You must have access to the budget that you want to associate to the campaign.

Prerequisites

* An Active budget that has a valid period of overlap between the campaign dates and the budget dates

* Access to the budget

Notes

* For new campaigns, you can enter the initial estimated budget amount in the currency indicated.

* After you have entered the initial estimated budget amount, you can create a request for it. The request will be processed via the campaign approval process workflow.

Associating Costs, Revenues, and Metrics to a Campaign

Costs and Revenues are special types of metrics with features specific to accounting for costs and revenues and calculating the return on investment (ROI). Apart from costs and revenues, relevant seeded metrics are automatically available for tracking a campaign. Additionally, you may need to associate metrics that are specific for a campaign.

Use the Tracking tab to view, enter, and associate costs, revenues, and metrics for a campaign. The Views available to you for associating metrics to a campaign include Costs, Revenues, Metrics, or All. For each of these, you have the Details view that shows a table or the Hierarchy view. You can see the history for any metric and post actual costs to the budgets.

Prerequisite: The costs, revenues, and metrics that you want to add were set up by your administrator

Navigation: View a campaign in the Campaign Dashboard and select the Tracking tab.

Notes for Adding Metrics

* **Variance**: For costs the variance is forecast minus actual. For revenue and all other metrics the variance is actual minus forecast.

* **Variance %**: The costs variance percentage is forecast minus actual divided by the forecast. Revenue and other metrics are actual minus forecast divided by forecast.

- **History**: Click the History icon next to a metric to view a history of actual values for the metric, both in a table and in a trend graph. Enter search criteria to specify the time period and increments to show in the history. You can choose to see the history information in a cumulative or incremental view.

- **Add**: Click Add to view all available metrics of the type currently viewed (cost, revenue, metric, or all). Click Apply to add the new metric. It appears at the top of the table in Details view.

- After a campaign is activated, the metrics concurrent program must complete before various metrics are updated and displayed.

- **Rollup**: Click Rollup for a metric to view the hierarchy of all child objects that contribute to the selected rollup metric. You can also export the details to a csv file. See Costs, Revenues, and Metrics for Activities , page 11-29for details about rollups.

- Metrics can only be removed before the campaign becomes active.

- Only manual, function, and formula metrics can be removed. Rollup and summary metrics cannot be removed. Summary metrics are automatically removed when all metrics included in the summary are removed.

- You can enter the Actual and/or Forecast Values for the metrics. For Manual, Function, and Formula metric types, you can enter the Actual Values and the Forecast Values until a campaign becomes active.

Viewing Campaign Metrics History

You can view the trends of the actual and forecasted values for a metric by viewing its history. The Metric Background Processes concurrent program records the actual and forecasted values for metrics and populates the history tables for the corresponding marketing objects. The values in the metrics history tables are then used to display the metrics history. Refer *Oracle Marketing Implementation Guide* for more information on the background processes.

There must exist a marketing campaign with associated Metrics to view campaign metrics history.

Navigation: View campaign in the Campaign Dashboard > Tracking tab > click the History icon beside a metric

Notes

- **Date Interval:** The data interval options include Day, Week, Month, and Year. Example: if you enter the number 1 and the data interval as Week, the x-axis coordinates display 1-week intervals.

- **Value Type:** If you choose Cumulative, then the values are added up for each

display co-ordinate within the x-axis. If you choose Incremental, then the value of the metric at a given interval is displayed directly.

Entering Values for Campaign Costs and Revenue Metrics

You can update the forecast and actual values for relevant metrics.

Notes

- **View Options:** Select Input Only to be able to enter metrics information.

- You cannot update the forecast value when a campaign is Active.

- **Post to Budgets:** If this check box is selected, it enables the posting of the actual costs to the associated budget. This will lock the Actual cost column and you will not be able to make modifications to it.

- You can post actual costs for the displayed metrics that are of the cost type.

- You can only post costs to an active campaign.

- You can only post costs for manual and function costs.

- Actual cost can be entered once and not updated.

- Posted costs are proportioned across all budgets that the activity is sourcing from.

Understanding Campaign Execution

Campaign activities are the vehicles used to execute marketing campaigns. Topics in this section include:

- Campaign Activities Overview, page 8-10

- Understanding Activity Types, page 8-11

- Metrics and Monitors, page 8-11

- Understanding Teams, page 8-11

Campaign Activities Overview

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

Understanding Activity Types

Activities are categorized based on the outbound channel of execution. In Oracle Marketing, you can create a specific type of activity by choosing a channel category and a channel for the activity. For example, the Channel Category is Direct Marketing and the Channel is E-mail.

For some marketing activities you have a choice of channels. For example, for an indirect marketing channel, such as Advertisement, you can select from a list of channels, such as TV, Radio, Billboards, and so on.

Metrics and Monitors

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

The process flow is as follows:

1. Create the Campaign Activity.

2. Define attributes for the Campaign Activity.

3. Define the Monitor.

4. Associate the Monitor to Campaign Activity.

5. The system activates the Campaign Activity if and when the monitor condition is met.

Understanding Teams

You can choose to limit all access to one or more marketing campaigns to only those resources who are within your team (or group of users such as a franchise, organization, or branch). You can do so by setting the Confidential flag for a campaign. When you create a campaign, you can define it to be confidential, so that only you and your team members can access it.

An administrator has full access to all the campaigns, immaterial of the status of the Confidential flag.

You can give read-only access to other users and teams by adding them to a campaign. This enables rollup access to a parent program.

Campaign schedules associated with a campaign inherit the confidentiality associated with the campaign.

9

Working with Offers

This chapter covers the following topics:

- Offers Overview
- Creating and Managing Offers
- Creating Web Offer Content

Offers Overview

An offer is an incentive designed to entice customers to purchase your product or service and so maximize on your return on investments. It can take several different forms depending on who your target audience is and what you want the offer to accomplish.

You can create offers as stand alone objects or attach them to Campaigns or Products. Offers come in many different varieties which are used for specific promotion types. You may include a free product when another product is purchased or offer discounts off purchase prices. Some examples of offers include:

- Buy a Children's Combo Meal and receive a cartoon character figurine

- Buy 2 get 1 free

- Purchase a DVD player and receive a free DVD

- Today Only! 25% Off Original Price

- Buy $100 worth of items and receive 20% off the entire order

Some of the basic attributes and associations that you can define for an offer include:

- Associate an offer type for it, which will define the attributes that must specified for the offer.

- Define the target customer at whom the offer is directed. For example, you may want to define an offer for a specific segment of people such as for the residents of California.

- Specify the duration for the offer. This can be based on different qualifiers - Order Dates, Ship Dates, or Performance Dates (Offer performance is based on the rules that a customer must comply with to be eligible for the offer - example, customers will be paid a bonus based on the quantities of a product they sell).

- Associate a budget from where the funds for the offer will be sourced. If this budget has a market eligibility criteria defined, it must match the customer defined for the offer. For example, if a budget is created for funding the marketing channels for California, an offer can source funds from it only if its target customers belong to lists or segments containing the residents of California.

- Define the discount level to be Line to make the offer for each individual item in product category, Group of Lines to make the offer for the total invoice amount for the products of a category, or Order to make the offer for the total amount of an order (containing items of different product categories). For example, for a category, to offer a 5% discount on Product A and 10% on Product B, select the Line discount level.

- Specify Committed Amount as the amount that you want to commit to meet the offer expenses. You can also set this amount to be the maximum amount for the offer. If the maximum is not set, then, based on the performance of the offer, you can exceed the committed amount.

- Set the Confidential flag to restrict access to the offer to yourself and your team members. You can allow access to other teams and users by adding them to the offer object. See Adding Security to a Marketing Object, page 2-7 for more information.

- Define an offer to be reusable to make it available across the activities associated with a campaign.

- Define the details of the offer as Discount Rules. Discount rules enable you to enter discount information for individual products and product lines in the offer. For an offer, you can select the discount level, and discount tier based on how you want to offer discounts.

- Define advanced options for the offer to facilitate product pricing. See *Oracle Advanced Pricing User Guide* for product pricing information.

- Associate text or image with the offer that will be rendered as content for a Web Offer Schedule.

Offer Types

The different forms that offers can take are reflected in the different offer types that are seeded in the application. Offers may be from Business to Business (B2B) or Business to Customer (B2C).

Off-invoice Offer

This is also known as On-invoice offer. In an Off-invoice offer, discount is offered on the invoice amount when customers purchase the specified quantity of a product. Customers will be eligible for the discount only if they buy the specified number of units of the specified product. For example, Buy 100 units of Product A and get 10% off on the purchase price.

The discounts and quantities can be tiered. For example,

- Buy 100 units of the product and get 5% discount

- Buy 101-200 units of the product and get 10% discount

- Buy 201 or more units of the product and get 15% discount

Order Value Offer

In an Order Value offer, discount is offered on the entire order value, irrespective of the products that a customer purchases. The customer may purchase different products; the discount is offered on the total value (order amount) of these products.

The discounts can be tiered. For example:

- Spend $100 to $499 and get 10% off on the total purchase price

- Spend $500 or more and get 20% off on the total purchase price

Promotional Goods Offer

A Promotional Goods offer includes an additional product or service with the purchase of a specified product. When customers purchase certain goods or services, they are eligible for one of the following:

- To receive additional goods or services at no extra charge. For example, purchase a Computer and get a free Printer.

- To receive a percentage off on additional goods or services. For example, purchase a Refrigerator and get 50% discount on a Food Processor.

This offer type can be either on a recurring basis or non-recurring basis.

Assume that you have created Promotional Goods offer whereby the customers will get 1 unit of Product B absolutely free if they purchase 10 units of Product A. In this case:

- If the offer is on a non-recurring basis, then a customer who purchases 20 units of Product A, will get 1 unit of Product B.

- If the offer is on a recurring basis, then a customer who purchases 20 units of Product A, will get 2 units of Product B.

Terms Upgrade Offer

In a Terms Upgrade offer, discount is offered on costs that are associated with a purchase; the discount is related to the purchase. For example:

- Purchase $100 worth of items and receive free shipping.

- Purchase a car and receive four free service sessions for the car.

For information on the following offer types, refer the *Oracle Trade Management User Guide*.

- Accrual Offer

- Net Accrual Offer

- Lump sum Offer

- Volume Offer

- Trade Deal

- Scan Data Offer

Sourcing Off-Invoice Offers from Budgets

When Off-invoice offers (including Off-invoice, Order value, Promotional goods, and Terms upgrade offers) are applied, certain discounts are given and the amount that the customers need to pay is reduced. When you source Off-invoice offers from a budget and execute the offers, the utilized and paid columns in the budget get updated simultaneously.

For example, the selling price of a product is $100. You create an off-invoice offer to give 10% discount on the product, and you source the offer from a budget. The committed amount for the offer is $10,000. A customer places an order for 10 units of the product. Because the discount offered is 10%, the customer has to pay only $900 instead of $1000. In this case, the amount the utilized and paid columns in the budget both simultaneously get updated to $100.

Total	Committed	Utilized	Earned	Paid
5,00,000	10,000	100	100	100

For the details of how the following offers are sourced from budgets, refer the *Oracle Trade Management User Guide*.

- Accrual Offers

- Lump sum Offer

- Scan Data Offer

- Volume Accrual Offer

Creating and Managing Offers

Procedures in this section include:

- Creating an Offer, page 9-5

- Setting Advanced Offer Options, page 9-5

- Associating Offers with a Campaign, page 9-6

- Creating Offer Budgets, page 9-6

Related Topics

Oracle Trade Management User Guide

Creating an Offer

Offers come in many different varieties. You can create offers from the Offers subtab of the Product tab or the Campaign tab. Both pages use the same functionality.

Notes

- A product can be added to an offer only when you create or update an offer.

Setting Advanced Offer Options

Advanced Options are used to precisely control pricing modifiers in Oracle Advanced Pricing. Refer *Oracle Advanced Pricing User Guide* for more information.

Associating Offers with a Campaign

Associate one or more existing offers with a campaign. Go to Offering mid tab for campaigns or activities.

Select the Primary Flag if a particular offer should take precedence over the rest of the offers associated with the campaign.

Creating Offer Budgets

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

Creating Web Offer Content

Use the following information to create click-through destinations for Web Offers.

Prerequisites

- An offer exists

- The offer is "Request only"

- The offer has a discount level of "line"

- The profile AMS: Item Validation Organization and IBE: Item Validation Organization are set to the same Master Inventory Organizations.

Navigation: Campaign > Campaigns > Offer > Contents

Notes

- **Type:**

  - **Web Image:** Displays an image to the user. The user clicks the image and is routed to the destination page defined.

  - **Web Text:** Display text to the user. The user click the text and is routed to the destination page defined.

- **Subtype:** This field determines the style or the look and feel of the content.

- **Upload New Image:** Click this button to use an image from your desktop.

Click Through Destination Region Notes

- **Action:** Select "Go to Shopping Cart page in iStore with an item". Then select a Speciality Store, a Section, and a product or item

10

Working with Budgets

This chapter covers the following topics:

- Overview of Budgets
- Budget Planning
- Creating and Managing Budgets
- Budget Execution
- Budget Tracking

Overview of Budgets

Budgets in Oracle Marketing are the funding source for a variety of objects. These objects, such as campaigns and events, may require other approvals before a funding request may be made. Budgets may exist in a hierarchical structure, a root budget supplying funds to child budgets, allowing you to view and control costs. Budget checkbooks have columns for: Total (original amount), Holdback, Planned, Committed, Balance (Total – Holdback – Committed), Utilized and Balance, giving you a clear view of utilized and available funds. Oracle Marketing's budgeting functions are grouped in the following categories:

- Budget Planning

- Budget Execution

- Budget Tracking

- Budget Administration - Refer *Oracle Marketing Implementation Guide* for information on administering budgets.

Budget Planning

Budget planning includes defining Fixed and Accrual budgets, the market eligibility of

customers, and the product eligibility for a product or product family.

Fixed Budget

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

Multiple marketing objects request money from fixed budgets including campaigns, campaign activities, events, event activities, and so on.

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

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

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

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

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

For more details about different budgets, refer *Oracle Trade Management User Guide*.

Market Eligibility

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

- Classification

- Validation - to validate that a campaign or event schedule matches that of the budget category.

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

- Individual customers

Individual customers are eligible whether they are sold-to, bill-to, or ship-to customers. These are customer "accounts" in Oracle Trading Architecture Community (TCA).

- Buying Groups

    Buying Groups are organizations formed when companies group themselves together to leverage on higher purchase volume achieved as a group.

- Lists

    Lists are groupings of customers or customer contacts created based on user-specified criteria. You can specify the criteria using Oracle Discoverer workbooks or queries and save the result as a static list.

- Segments

    Segments are also groupings of customers or customer contacts. Like lists, they are also created based on user-specified criteria via Discoverer workbooks or writing queries. However, segments are dynamic in that every time you generate the segment, based on the query criteria, the result is generated afresh.

- Territories

    Territories are yet another way to group customers together, based on their location and other attributes. They are created in the Oracle Territory Manager module.

Product Eligibility

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

Creating and Managing Budgets

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

Procedures in this section include:

- Creating a Fixed Budget, page 10-4

- Updating Market Eligibility for Fixed Budgets, page 10-5

- Updating Products for Fixed Budgets, page 10-5

- Creating Budget Requests from a Budget, page 10-6

Creating a Fixed Budget

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

- It can fund marketing activities such as campaigns, events, and deliverables

- Its budget amount can change by transfers and requests

- It is active until a user manually closes it, even after the end date is reached

Use the following information to create a fixed budget.

Navigation: Budget > Budgets > Create

Notes

- **Setup Type:** Select Fixed. The Setup Type for a budget determines what attributes are displayed as side navigation links and whether the budget is a fixed budget or a fully accrued budget.

- **Business Unit:** Business units are organizations set up in Oracle Human Resources with Type = Business Unit. It is used here mainly for classification purposes. It can also affect the approval rule built for the budget.

- **Budget Category:** These are set up in Administration and can be used to classify the budget. An approval rule defined for a budget may use budget category as one of its criteria.

- **Budget Amount:** The budget amount is the money set aside for this fixed budget.

- **Holdback amount:** Holdback amount is the amount which you would like to reserve and not allocate down to lower levels. A budget owner may choose to

release the holdback amount at any time.

- **Start and End periods:** These are set up to map to GL calendars and if selected, will limit the start and end dates.

Updating Market Eligibility for Fixed Budgets

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

Prerequisite: A draft fixed budget exists

Navigation: Budget > Budgets > Market Eligibility

Updating Products for Fixed Budgets

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

Prerequisite: A draft fixed budget exists

Navigation: Budget > Budgets > Products

Notes

- Include a product category, a product, or a combination of both. Some meaningful combinations may be:

  - Include Categories Only. For example, include a particular category called "Household Supplies" which contains multiple household supplies products within it.

  - Include Categories and Products. For example, include a particular category called "Household Supplies" which contains multiple household supplies products within it, plus a product called "Industrial Cleaning Solution" which does not fall into the "Household Supplies" category but is a product that you want to associate to the budget.

  - Include Categories, Include/Exclude Products. For example, include a particular category called "Household Supplies" but exclude a product within the category called "Discontinued Washing Detergent."

  - Include Some Categories, Exclude Some Categories. For example, include a bigger category called "New Products" but exclude a smaller category called "Household Supplies."

  - Include Some Categories, Exclude Some Categories, Include Products. For example, include a bigger category called "New Products" but exclude a smaller category called "Household Supplies", and in addition include a particular product called "Discontinued Washing Detergent."

  - Include Some Categories, Exclude Some Categories, Exclude Products. For

example, include a bigger category called "New Products" but exclude a smaller category called "Household Supplies", and in addition exclude a particular product called "New Industrial Washing Detergent."

- Include Products Only. For example, simply include a product called "New Industrial Washing Detergent."

Creating Budget Requests from a Budget

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

Prerequisite: Access to the Budget Request page

Navigation: Budget > Budget Transfers > Create Request

Creating Budget Transfers from an Object

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

Prerequisites

- Access to the Budget Transfer page

- Both the granting and the receiving budgets are active

Navigation: Budgets > Create Transfer

Creating Budget Transfers from a Budget

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

Prerequisites

- Access to the Budget Transfer page

- Both the granting and the receiving budgets are active

Navigation: Budget > Budget Transfers > Create Request

Viewing Budget Utilized

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

Prerequisite: Access to view the budget

Navigation: Budget > Budgets

Notes

- **Component Type:** Campaign Activity or Offers which source from a Campaign.

- **Document Customer:** The customer specified on the document (that is, an order or simply an adjustment). This is only populated if Channel Category is Offer.

- **Document Type:** Order. This is only populated if Channel Category is Offer.

- **Document Number:** Order number. This is only populated if Channel Category is Offer.

- **Document Date:** Order date. This is only populated if Channel Category is Offer.

- **Adjustment Utilization Type:** This can be Utilized, Accrual or Adjustment. It is Utilized for off invoice discounted amounts as well as costs from campaigns/events posted to the budget. It is Accrual for accrual offer amounts.

- **Adjustment Type:** This is only populated if Utilization Type is Adjustment.

- **Adjustment Date:** The date on which the budget is updated with the adjustment.

- **Utilization Amount in Different Currencies**

  - **Transaction Currency:** This is the currency from an order transaction.

  - **Budget Self Currency:** This is the currency which the budget is created in.

Reconciling a Budget

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

- It adjusts previously committed, but unutilized funds, transferring them from the Committed column to the Available column ("Reconcile Un-Utilized")

- It adjusts previously utilized, but unpaid funds, thus adjusting the Utilized column accordingly and transferring it from the Committed column to the Available column ("Reconcile Un-Utilized and Un-Paid Earnings"). This option is not currently applicable for marketing purpose.

The Reconcile button will appear after the marketing activity's end date and when its status is Completed or Closed, or if the activity has no end date specified, its status is Completed or Closed.

Use the following information to reconcile a budget.

> **Note:** As a sample object, a Campaign has been used in the topic, but reconciliation can be performed for Events and Deliverables as well.

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

Navigation: Campaign > Campaigns > Budget

Notes

- The Reconciliation section at the bottom of the page appears if one of the following is true:

    - End date of the campaign is past.

    - Offer status = Completed or Closed

- **Reconciliation Option:** The option "Un-Utilized" is applicable for marketing while the other, "Un-Utilized and Un-Paid Earnings" is not. Un-Utilized amount = (Committed – Utilized). During reconciliation, the budget's committed amount will be reduced and its available amount will be increased accordingly. For example, an offer has committed = $10K, utilized = $8K. This kind of reconciliation will decrease the committed from $10K to $8K and increase the budget available by $2K.

Viewing the Budget Checkbook

The budget checkbook summarizes the main budget buckets.

Use the following procedure to view a budget checkbook.

Prerequisite: Access to the Budget

Navigation: Budget > Budgets > Checkbook

Viewing the Customer Checkbook

The customer checkbook summarizes the main budget buckets by customer. You can get to a customer checkbook by viewing the 'Customer Budget View.' A profile option determines if you can view all the customers' budget views or simply those customers who belong to the budget you own. For more information, refer *Oracle Trade Management Implementation Guide*.

Use the following procedure to view the customer checkbook.

Prerequisite: Access to the Budget

Navigation: Budget > Budgets > Customer Budget View

Notes

- Total after Holdback - Total amount of the budget minus holdback amount

- Planned - Total amount of not yet approved budget requests

- Committed - Total amount of all approved budget requests

- Recalculated Committed - The amount of commitment calculated based on actual utilization. If re-calculated committed is implemented, the amount here displays the

real committed funds

- Balance - Total after Holdback minus Committed

Viewing Budget Rollup

Use the following information to view a budget rollup.

Prerequisite: Access to the Budget

Navigation: Budget > Budgets

Notes

- Change the view from the default Self View to Rollup View.

Adding a Budget Threshold

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

Prerequisite: Access to the budget

Navigation: Budget > Budgets

Notes

- Search for and select the threshold rule set up under Administration.

Activating a Budget

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

Use the following information to activate a budget.

Prerequisites: Access to the Budget

Navigation: Budget > Budgets

Notes

- Click **Request Approval**, review the approval details, and click **Submit**.

Budget Execution

Topics in this section include:

- Budget Request, page 10-10

- Budget Transfer, page 10-10

- Budget Reconciliation, page 10-10

Budget Request

A budget request is a request to withdraw money from a budget and it comes through marketing objects such as campaigns, activities, or deliverables. A budget request may also be submitted by sales representatives who want to give an offer to customers or by the owner of another budget. Requests generally need to be approved before money actually gets transferred. Approval rules can be configured to route different requests to different approvers.

A budget may provide funding for multiple marketing activities, and vice versa; an activity such as a campaign can receive funds from multiple budgets.

Budget Transfer

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

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

Budget Reconciliation

Reconciliation is a way to return unutilized money at the end of a marketing activity. Previously committed, but unutilized funds, are adjusted by transferring them from being committed to becoming available again. You can use this functionality when a marketing activity has completed or when the activity has been cancelled.

You can reconcile a budget only if a campaign's end date has been reached and its status is 'Completed' or if the campaign has no end date and its status is 'Completed'. You can drill down all reconciliations to view their details. You can also set the reconciliation to be performed automatically by a concurrent process by defining a grace period for it.

Budget Tracking

Topics in this section include:

- Budget Buckets, page 10-10

- Budget Roll-Up View, page 10-11

Budget Buckets

The Table Budget Buckets, page 10-11 describes the multiple buckets used to track

different Budget amounts.

Budget Buckets

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

Budget Roll-Up View

The budget rollup view shows the total funds in a budget, including the sum of all its child budgets. For example, if there is a budget hierarchy where there are 3 levels, each level with one node, like USA, Western Region, and California, then the roll-up view of USA will be the numbers for USA+Western Region+California.

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

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

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

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

Users in a budget hierarchy can see real-time, roll-up views based on their user profile currency. For example, a manager in Canada may see the roll-up view in Canadian Dollars. The budget's parent may be owned by a US manager who may prefer to see the roll-up view in USD.

Related Topics

See the *Oracle Trade Management User Guide* for more information about budgets.

11

Creating Activities

This chapter covers the following topics:

- Understanding Campaign Activities
- Understanding Activity Purposes
- Understanding Activity Templates
- Using Marketing Collateral
- Creating a Campaign Activity
- Setting Up Activities
- Associating a Product or Offer
- Using Collaboration with Campaign Activities
- Understanding Target, Control, and Contact Groups
- Understanding and Using Fatigue Rules
- Using Target Groups
- Defining Control Groups
- Control Group Analysis Report
- Costs, Revenues, and Metrics for Activities
- Associating Costs, Revenues, and Metrics for Tracking
- Associating Partners with Campaign Activities
- Understanding and Using Activity Operational Reports

Understanding Campaign Activities

A Campaign Activity is the delivery tool for a marketing campaign. After precampaign analysis and planning, marketers create campaign activities, each with a specific purpose and using a specific channel. The following figure shows a typical campaign

activity flow.

The Campaign Activity Process
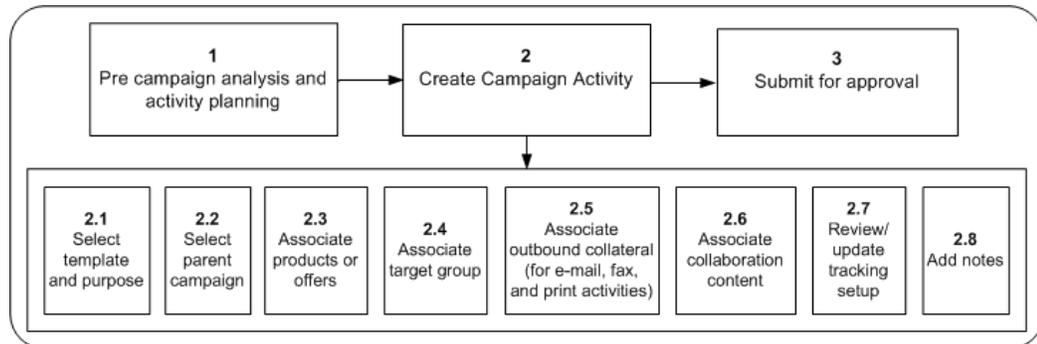
A campaign ativity's tasks flow logically as follows:

1. Performing precampaign analysis and activity planning.

2. Creating a campaign activity, that includes:

    1. Selecting a template for a specific marketing execution channel

    2. Selecting a purpose

    3. Selecting the parent campaign

    4. Associating products and/or offers to the activity

    5. Associating a target group

    6. Associating outbound collateral

    7. Associating collaboration content

    8. Updating tracking setup

    9. Adding notes, if desired

3. Submitting the activity for approval.

In the process of creation and execution, a campaign activity can be in different transition states as depicted in the following figure.

A Campaign Activity's Status Transitions
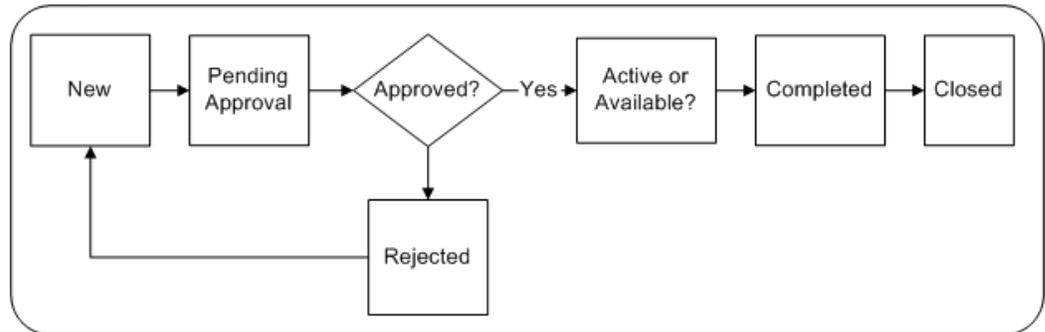
When approval is needed, the transition states for a campaign activity include:

- New - Upon creation

- Pending approval - When the marketer has manually submitted the activity for approval. A notification is sent to the approving authority requesting the approval

- Rejected - When the approving authority rejects the activity. The activity can then go back to the New status and be considered for approval again

- Active - After approval, from the Launch on Date and thereafter, until End on Date

- Completed - You may set the activity status to Completed when the End on Date is reached

- Closed - You can set the status as Closed on the End on Date specified or after

When approval is not needed, the transition states for an activity include:

- New - When first created

- Available - A New activity passes to the Available status

- Active - From the Launch on Date and thereafter

- Completed - You may set the activity status to Completed when the End on Date is reached

- Closed - You can set the status as Closed on the End on Date specified or after

When you create a campaign activity, you must specify the basic attributes, such as Activity Name, Activity Template, Parent Campaign, and Launch on Date.

Optionally, you may specify the Source Code, End on Date, Objective, and Marketing Medium when applicable. If you do not specify the Source Code, the system will generate one as it is a unique index into marketing channels.

Based on the channel of execution of a campaign activity, you must define additional attributes as needed. For example, for an e-mail or direct mail print activity, you must specify a target group, while for advertising or Web schedules, a target group is not necessary.

The following diagram shows the flow of statuses for an activity.

Activity Statuses
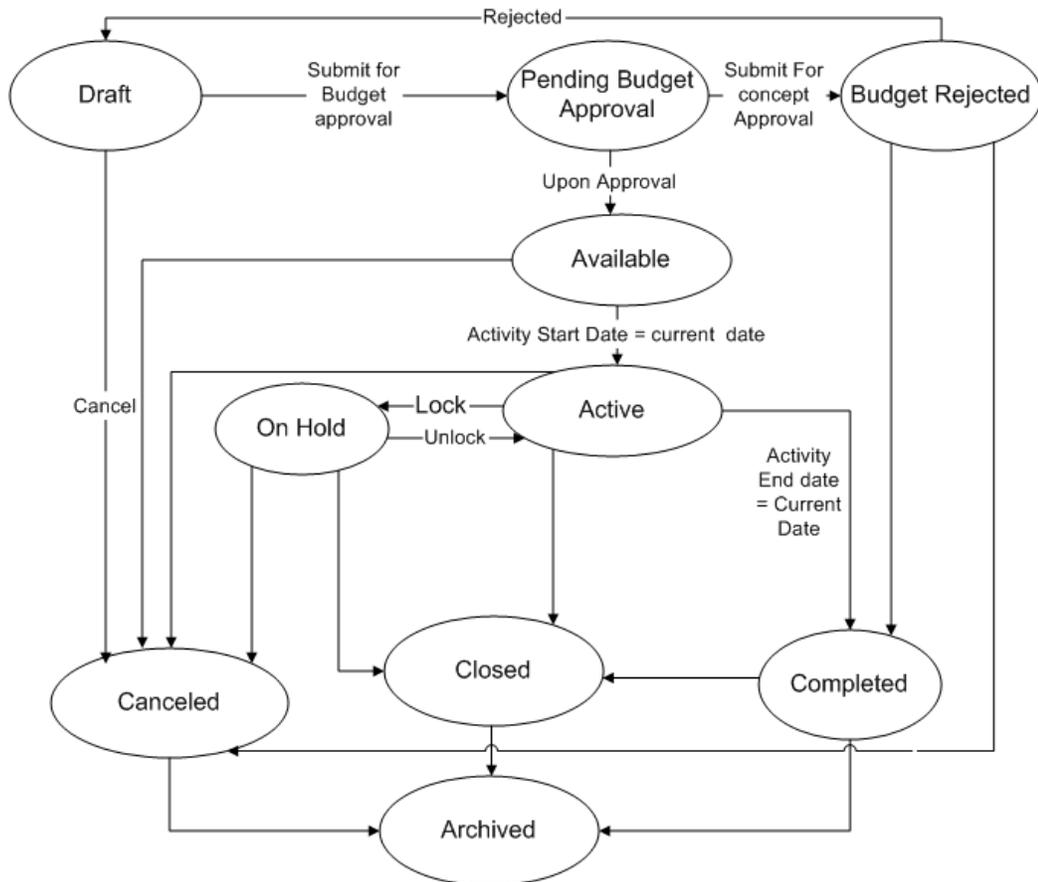
Understanding Activity Purposes

For activity planning purposes, you can align channels (and associated activity purposes) with the overall marketing objectives. For example, if the goal is to increase marketing effectiveness, and cross sell is the primary way to achieve this, then the activity purpose would be "Cross Sell".

Marketers have the option of choosing from the following seeded purposes:

• Cross Sell - When you want to direct marketing activities at existing customers

• Up Sell - When you want to target customers who have bought a related product

- Customer Acquisition - When you want to spread your customer base

- Customer Retention - When you want to build customer loyalty

- Lead Maturation - When you want to initiate activities to improve lead quality

To help you create suitable target groups for your activities, administrators can create list templates and include segmentation rules to support these purposes. When you select a purpose for a campaign activity, the associated list template becomes available.

Administrators can also create custom purposes to meet your specific needs. For example, advertisements or Web activities may be set up to build brand awareness or surveys can be created to measure customer satisfaction. Because advertisement activities do not target specific target groups, no list template is required. However, to target customers for customer satisfaction surveys, the list template needs to extract a list of customers based on their service and support history. Refer *Oracle Marketing Implementation Guide* for details on creating custom purposes.

Understanding Activity Templates

Activity setup can be quickly and easily performed as each activity is based on an Activity Template. An Activity Template provides a prebuilt framework that includes predefined values and specification for commonly used activity attributes. These include:

- Channel - Each Activity Template is created for one marketing execution channel such as email, print, fax, or Web.

- Activity Purpose - Each Activity Template is associated with one or more activity purposes. For a Campaign Activity, you may choose one of these purposes. Seeded purposes include: cross sell, up sell, customer retention, customer acquisition, and lead maturation. For more information, see Understanding Activity Purposes, page 11-4.

- List Template - Each purpose associated with an Activity Template can be tied with a default List Template. Based on the purpose selected for activity setup, this default List Template can be used to create the target group for the activity, or you may choose some other List Template for target group specification.

- Outbound Collateral - The Activity Template defaults the marketing execution channel for a activity, and each marketing execution channel is associated with specific cover letter types to facilitate outbound collateral creation.

- Approval Needs - The Activity Template also dictates whether the activity needs approval. Campaign activities created based on seeded activity templates do need approval.

Administrators can create custom activity templates based on Channel Category and

channel to suit specific business needs. Refer to the *Oracle Marketing Implementation Guide* for information on creating custom activity templates.

Using Marketing Collateral

When you create E-mail, Fax, Print, or Advertisement campaign activities, you may want to include electronic marketing collateral, such as product data sheets, white papers, promotional flyers, newsletters, cover letters, invitations, and so on. Such collateral are outbound and must reach the customer. For example, if you are organizing a press conference to launch a product, you may want to send out invitations. Alternatively, you may include the product datasheet to go out as an attachment in the e-mail.

Cover letters for the different direct marketing channels (e-mail, fax, and print) and other outbound collateral are stored and managed in Oracle Content Manager (OCM). To maintain security for content, you need to have access to the OCM folders to be able to create content items. Refer the *Oracle Content Manager Implementation and Administration Guide* for more information on folder security.

While many versions of a collateral may exist in the OCM repository, only one version can be live. When the content associated with an activity is fulfilled, the live version of the content is used.

For Direct Marketing Print campaign activities, cover letters can be either in Portable Document Format (PDF) or Rich Text Format (RTF) formats. Refer the *Oracle Content Manager Implementation and Administration Guide* for more information on collateral creation and maintenance.

For Web activities, the execution content is the content for Web Ads, Web Offers, or Product Recommendations.

Creating a Campaign Activity

To speed up campaign activity creation, your new activity is based either on an activity template or on an existing activity (which also uses a template).

Notes for Copying an Existing Activity

- You can access the Create Activity for Activity Copy from the Campaign dashboard, from the Campaign Activities views, or from the Activities tab of Campaign Details. There is also a Copy icon in each activity row in the Activities list.

- **Create Method**: Select Copy.

- **Copy From**: You can only select an activity to which you have ownership or team access and that has an active template.

- **Template**: The template is defaulted from the copied activity and cannot be

changed.

- **Channel Category**: The channel category is defaulted from the copied activity and cannot be changed.

- **Channel**: The channel is defaulted from tehh copied activity and cannot be changed.

- **Name**: Provide a unique name for the activity. The default is Copy of copied activity.

- **Source Code**: The source code is a unique identifier used to track all transactions against the activity. If you do not enter a source code, then the system generates it.

- **Parent Campaign**: The parent campaign is required for activities. You can select a campaign that you have ownership, team, or read only access to and that is not expired and does not have a status of canceled, completed, closed, or archived. The parent campaign defaults from the copied activity unless the campaign is expired or has a status of canceled, completed, closed, or archived. The activity team and visibility restrictions (confidential flag) are inherited from the parent campaign.

- **Purpose**: Select a purpose. See Understanding Activity Purposes, page 11-4.

- **Launch On and End On Dates**: The launch date is required and defaults to the current date. The end date defaults to the end date of the parent campaign. If the parent campaign from the copied activity was not valid to be defaulted, then the end date is based on the duration of the copied activity and the current date as the launch date. The dates must fall within the date range of the parent campaign.

- **Marketing Medium**: Marketing media is defaulted from the copied campaign. All active marketing media defined in the system is available for selection.

- **Coordinator**: You are the defaulted coordinator.

- **Objective**: Each activity needs its own unique objective description. Enter an objective.

- **Components to copy**: All activity associations are listed and selected to be copied to the new activity: additional information, offering (products only), target group and control group definitions, collateral, partners, and event setup for event type activities. You can change the selections for all except additional information and event setup.

Notes for Creating a New Activity

- You can access Create Activity from the Marketing dashboard, from the Campaign Activities views, or from the Activities tab of Campaign Details.

- **Create Method**: Select New.

- **Template**: The template dictates the associations that must be defined to complete the activity setup. The template must have an active status.

- **Channel Category**: The channel category is dictated by the template.

- **Channel**: If the template defines a channel, then it is read only. If the template does not define the channel, then you can select a channel from those associated to the channel category.

- **Name**: Provide a unique name for the activity.

- **Source Code**: The source code is a unique identifier used to track all transactions against the activity. If you do not enter a source code, then the system generates it.

- **Parent Campaign**: The parent campaign is required for activities. If you clicked Create Activity from the Activities tab in the Campaign Details page, then that campaign becomes the parent and you cannot change it. You can select a campaign that you have ownership, team, or read only access to and that is not expired and does not have a status of canceled, completed, closed, or archived. The activity team and visibility restrictions (confidential flag) are inherited from the parent campaign.

- **Purpose**: Select a purpose. See Understanding Activity Purposes, page 11-4.

- **Launch On and End On Dates**: The launch date is required, the end date is not required. The end date defaults to the end date of the parent campaign. The dates must fall within the date range of the parent campaign.

- **Marketing Medium**: All active marketing media defined in the system is available for selection.

- **Coordinator**: The person who is responsible for managing the activity. Your name is the default. You can select any marketing resource from the resource LOV.

- **Objective**: Enter descriptive information about the objective for this activity.

When your copy or create completes, the Activity is created with a New status. The Details page appears and you can view and update all the details and associations.

Setting Up Activities

Campaign activities are the main execution vehicles for marketing. Activity setup includes setting up products to promote, offers, a target group to contact, and the collateral content to deliver. Setting up event activities includes an agenda, registration requirements, and roster management. Web content needs to be set up for identified web placements for web activities.

Notes

- Select an existing activity to view and update the details of the activity and all of its associations dictated by the activity template.

- **Summary View**: View all the related information on one page and print it.

- The header information for the campaign can or cannot be updated based on the rules set up by your administrator.

- When all changes are complete, click **Submit for Approval** if the activity requires approval, or click **Activate** if no approval is required.

  If you are the approver for the activity, or no approval is needed, then the status immediately becomes Available/Active. If you are not the approver but approval is required, then you can review the approvers and submit for approval. Click **View Approval** to check the approval status.

- **Triggered by**: The name of the monitor that triggered the activity, if it was triggered by a monitor. The name is a link to monitor details if you have access to financial information. The monitor overrides the launch date.

- **Event Setup tab**: Set up event activities, page 23-9.

- **Web Planner tab**: See Associating a We Ad or Web Offer Activity to a Placement, page 13-8.

- **Target Group tab**: You can define target groups (audience) for your campaign activities and preview the list entries generated. See Using Target Groups, page 11-20.

- **Offering tab**: You can choose a product or product category from an LOV of all products or from the Promoted Products LOV, which lists only products and categories associated with the parent campaign and their children. The product category set as primary (or the product category for the product set as primary) is used for reporting in DBI. Only valid (not expired) products and categories can be associated to a campaign.

  You can add any offer that is associated to the parent campaign. Select one offer as the primary.

  You cannot make changes in this tab after the activity is in an active status. See Associating a Product or Offer, page 11-11.

- **Partners tab**: Marketers may assign partners, such as Value Added Distributors (VADs), Value Added Resellers (VARs), agents, and so on, to campaign activities. See Associating Partners with Campaign Activities, page 11-36.

- **Budget tab**: Team members with access to financial data can enter an estimate for the budget requirements for the activity. The default is the total forecast cost. This

amount can be updated until the activity becomes active. Click Manage Budget to open the Budget Cue Card page and review budget activity, create a request or transfer, or access the activity budget checkbook.

- **Collaboration tab**: Collaboration content is material associated to campaign activities and is usually not outbound (that is, not sent out to customers). It can be content items, such as a product data sheet or pricing information, proposal templates for Sales activities, or scripts.

  Any content stored in Oracle Content Management that is in progress or approved and to which you have access, can be added to the activity so that all team members can see the same documents. You can add and delete content after the activity is activated. Select a content type and click Go to create a new content item.

  You can also add notes, such as directions, special instructions, or reminders, and tasks for the activity on this tab.

  In the Sales Kit section you can select a proposal template and script for the activity.

  See Using Collaboration with Campaign Activities, page 11-11.

- **Tracking tab**: Use this tab to review the performance of the activity using various metrics and monitors. You can also associate metrics and costs to the activity, and post costs to the budget. You can also create a monitor.

- **Additional Information tab**: Select Notify on Activation to receive a workflow notification each time a repeating activity is launched.

Please refer to the procedure for the type of activity you want to create. The procedure includes the common creation steps in the correct sequence.

- Advertising activities, page 12-1

- Web activities, page 13-1

- E-mail activities, page 14-1

- Fax activities, page 15-1

- Print activities, page 16-1

- Sales activities, page 17-1

- Telemarketing activities, page 18-1

- Event activities, page 23-9

Associating a Product or Offer

Use the Offering subtab to associate a product or offer with a campaign activity.

Notes

- Only products, product categories, and offers that have been associated to the parent campaign may be associated with the campaign activity

- For sales activities, products, and product categories associated with them are recorded as Lead Lines.

Understanding and Using Offering

The Offering functionality enables you to associate Products, Product Categories, or Offers that you want to promote with a campaign activity. Product categories available to campaign activities are those defined in the Single Product Catalog. You can either associate the products that are associated at the campaign level or any other product in the single product catalog. You can also associate offers that have been associated to the parent campaign. The offers associated at the activity level should either be associated with the product categories, with the products associated at the activity level, or should be independent of any product (for example, 10% off invoice). Additionally, you can associate offers of type Request Offers to a campaign activity. Request Offers are those that are requested by a customer. For example, customers may request a telesales executive for discounts based on coupons they hold.

The selected product or offer may also play a role in defining the segmentation parameters. For example, if a campaign activity is being planned for marketing electronic toys, the segmentation condition may be high-income parents with kids.

For sales activities, products, and product categories associated with them are recorded as Lead Lines.

Using Collaboration with Campaign Activities

Collaboration content is material associated to a campaign activity. Collaboration content is not outbound - that is, not sent out to customers. It includes content, scripts, or proposal templates, and is meant to be used by sales and external teams involved in the activity. For example, you may need to associate sales kits containing proposal templates, competition analysis, scripts, and so on. Additional collaboration content like competitive information, sales plans, and so on can also be included. Refer the *Oracle Proposals User Guide* for more information.

Collaboration content is governed by the same security considerations that are defined for the campaign activity. Once content is associated to a marketing object, all users who have access to the marketing object have access to the associated content.

Oracle Scripting integrates with Oracle Marketing to help you interact with customers

and track such interactions. Topics in this section include:

- Scripting Overview, page 11-12

- Associating Scripts to a Campaign Activity, page 11-14

Scripting Overview

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

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

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

Scripting Integration Process Flow

The following figure illustrates the Oracle Marketing/Oracle Scripting integration flow.
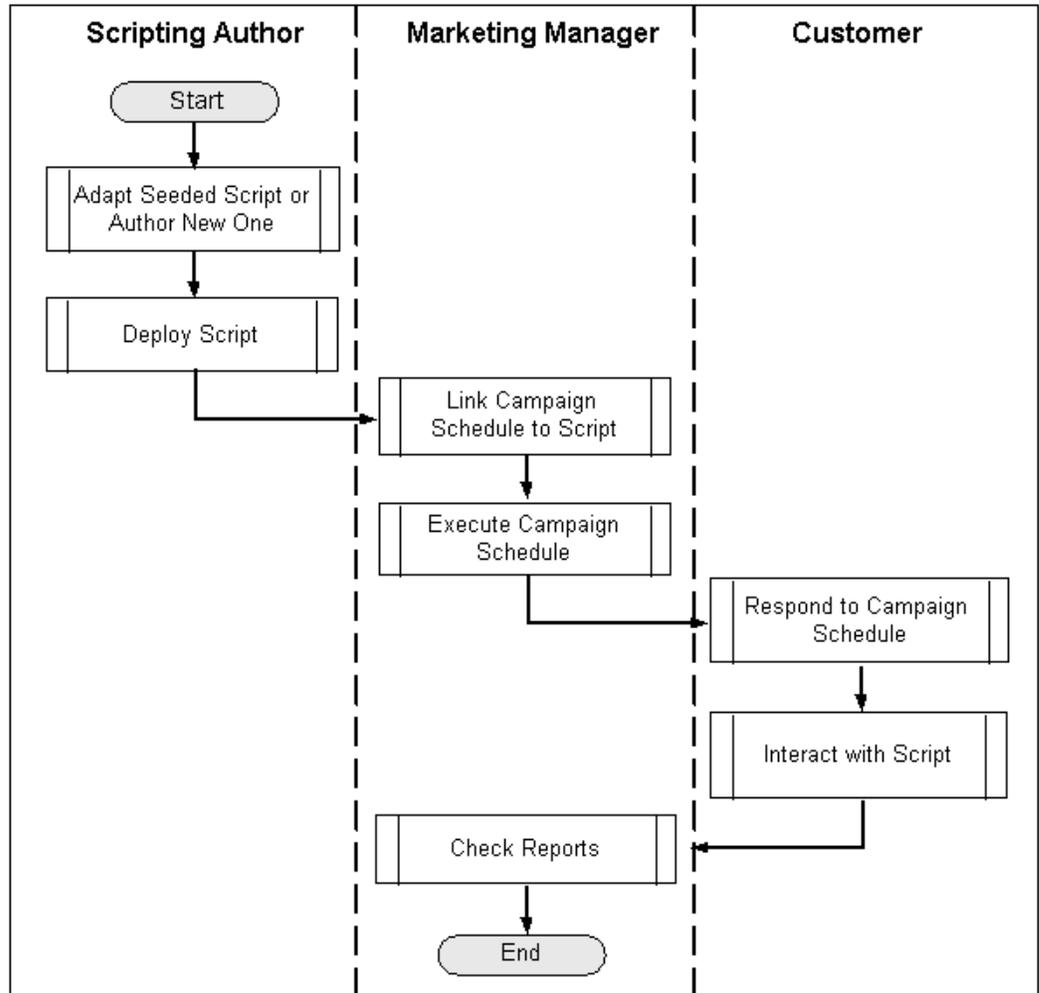
The high-level process flow is as follows:

1. A script is created in Oracle Scripting.

2. The Script is deployed in Oracle Scripting.

3. The marketer links a campaign activity to the script (using click-through destinations for Web scripts).

4. Customers responding to the activity are taken through the script, the customers' answers are collected, and the potential action (event registration, lead creation) is executed.

5. Marketer can check the activity dashboard for a report on the results of the activity.

Sample Scripts

Oracle Marketing comes with sample scripts for the following marketing-specific activities:

- Event Registration

- Event Registration Cancellation

- Lead Creation

- Customer Data Acquisition

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

Associating Scripts to a Campaign Activity

Scripting is integrated in Marketing through the use of click-through destinations (CTDs) that can be enabled behind a banner on store, via an e-mail, or even associated in direct marketing collateral. You can invite a list of customers to participate in a survey campaign or direct them to specific Web sites by visiting a defined URL. The return data from surveys can be used to evaluate customer satisfaction, improve product lines, target new or improved services, or otherwise improve responsiveness.

Navigation: Campaign > Campaigns > Collaboration mid-tab > Add Script

To view the responses to the deployed scripts view ,the operational reports for activities that deploy scripts through Click Through Destinations.

Understanding Target, Control, and Contact Groups

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

- List - a group of customers who match a set of conditions. A list is static, that is, once generated, a list has an unchanged number of entries.

- Segment - a set of conditions that will be executed dynamically when a target group is created. For example, a segment could be defined as residents living in the state of California. If this segment is associated with a target group, then the number of records satisfying the segment criteria at the time of generating the target group will be considered as part of the target list.

- Oracle Discoverer Workbook

- Imported list

- Custom SQL

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

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

Understanding and Using Fatigue Rules

Fatigue rules prevent marketing teams from over contacting their customer/prospect base. These rules enable them to carefully target customers so that they have a receptive group of customers even as they work towards meeting their marketing goals. For example, a fatigue rule could be created so that a customer is contacted four times (or less) per month. Fatigue rules are specified for a time period - weekly, monthly, quarterly, or yearly and are applied during campaign activity execution.

Use the following sections to understand the various concepts associated with fatigue rules and to perform related procedures.

- Overview of Fatigue Rules, page 11-15

- Tracking Fatigue for a Campaign Activity, page 11-19

- Previewing Activity-Level Fatigue, page 11-20

Overview of Fatigue Rules

Fatigue rules prevent marketers from over contacting their customer or prospects base. These rules enable you to carefully target customers so that they are more receptive to the marketing promotions and messages.

The business benefits derived from using fatigue rules include:

Promote Brand Awareness - If promotions are strategically timed, customers are not overexposed to noise. Therefore, when they are contacted they are likely to be more receptive.

Support marketing strategy decisions - Helps enforce marketing rules dictating customer contact limits.

Maximize Marketing Dollar Effectiveness - By strategically contacting customers, every marketing dollar spent receives (in theory) a better response rate, therefore improving effectivity.

Improve collaboration for the enterprise - Enables you to setup enterprise wide rules. For example, telesales, direct mail, and e-mail (all communication channels having the potential to fatigue the consumer) - by centralizing the rules, you can prevent all channels from over-contacting the consumer.

Understanding Fatigue Rules and Time Periods

A fatigue rule defines maximum permissible contacts within a specified time period. For example, "Do not contact customers more than two times per month by any channel." The defined time period adheres to a rolling period.

Rolling Period Example

An e-mail activity is set to execute on February 13th -- Amy is on the target list of customers to be contacted. The fatigue rule specifies, "Do not contact customers more than two times per month by any channel."

On 13th February (when the activity executes) it determines how many times Amy has been contacted in the last one month.

- Contact count for Amy in the last 30 days:

    - E-mail was sent to Amy on Jan 15 - one contact was counted.

    - Another e-mail was sent to Amy on Jan 21 - the count became two.

- As of Feb 13, Amy had already reached her threshold of "two contacts per month." Therefore, she is fatigued and cannot be contacted.

However, if the activity executed on Feb 14th, the total number of contacts within the last 30 days would have been 1. The contact on Jan 15th would have been rolled out from the past 30-day period starting Feb 14th.

Fatigue rule time periods are defined as follows:

Week = 7 days

Month = 30 days

Quarter = 90 days

Year = 365 days

Fatigue rules can be global or channel specific.

Global Fatigue Rules

Using this type of rule (threshold) you can set an absolute limit on the number of contacts by any channel for a given time period. For example, do not contact any customer more than 4 times per month by any channel. If exclusively setting channel-specific limits, global rules can be null.

Marketing Channel-Specific Fatigue Rules

Within the limits set globally, you can also establish specific rules (thresholds) for each outbound channel - direct mail (print), email, fax, and telemarketing (phone) For example, of the 4 total contacts allowed per month, do not contact customer by phone more than 2 times per month.

Depending on how the rules are setup, both global and channel rules can be applicable. For example, a global rule may be 'Do not contact customer more than once a week' and an e-mail channel rule may be 'Do not contact customers more than 2 times a month by e-mail'.

Activity Level Previews

You can use preview fatigue to determine whether an optimum number of customers are available for targeting. In a given target group, preview provides information about the total number of customers available to market and the total number of fatigued customer for a date range.

Customers can belong to the target groups of multiple activities and may be contacted too often. Therefore, they could be fatigued on a particular date. You can use the projected counts to adjust your activity start date to optimize your targeting need.

Activity level previews contain the following information:

- Total Size - The number of people in the target group eligible for targeting

- Target Date - The date for which fatigue status is being previewed

- Projected Available to Market - The total members in a target group not fatigued and available to be contacted on the target date

- Projected Fatigued - The total number of members in a target group who are fatigued and will not be contacted on the target date

The Preview functionality uses the historical fatigue counts tracked to date for each member of the target group against each date in a given date range. The set of currently queued activities are looked up, assuming that all approved, available, or active activities planned between the time of Preview and the previewed date will be

executed.

The fatigue projection is done for 28days.

You can drill down on Projected Fatigued Count to view the list of activities that are fatiguing people and how many people each activity can potentially fatigue. Access to activities are controlled by team security settings at the schedule level. Confidential activities will be displayed only if you have access to them.

Example to Demonstrate How Preview Works

Activity A is set up and previewed on June 1, and is to be activated on June 5. The activity contains Irvin as a member. On June 1, by Irvin's rolling period, Irvin has a running count of three contacts. But by June 5, by Irvin's rolling period, Irvin will have a running count of two contacts. So, two contacts is the number Preview will leverage for the June 5 schedule activation preview.

Two additional activities are already approved and planned for execution on June 3, both of which include Irvin as a member. Therefore Irvin's fatigue count on June 5 is projected at four contacts. Since the global limit per week is three contacts by any channel, Irvin will be considered fatigued and removed from the Preview function for Schedule A.
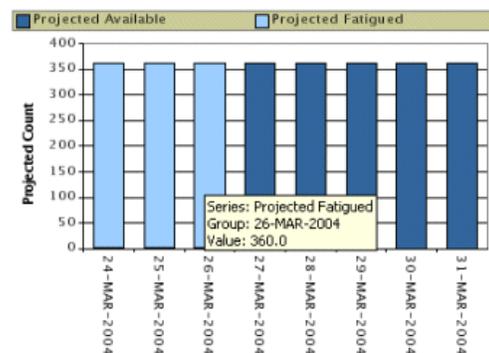
The preview displayed in Figure A, Sample Fatigue Preview, shows that the Projected Fatigue figures for the dates between March 24 and March 26 are high. Using this information, as a marketer, you can decide to wait until Mar 27 to launch your schedule, when you will have more customers to target.

A Sample Fatigue Preview

The Fatigue Rule Override Option

When launching a campaign activity, you can choose to override fatigue rules based on two key requirements:

- Not all communication is fatiguing - such as purchase confirmation e-mail, Event registration e-mail, and communications by request of the customer, such as opted in subscriptions to newsletters, offers, product information should not count towards fatigue thresholds.

- Not all communications are optional - For example, for communications that are part of a service contract or contract renewal notices, product recalls, important product launches, or churn risk, members should not be removed from the target group.

  > **Note:** For all sales activities, that is, for all campaign activities where the channel is Direct Sales, fatigue rules are automatically overridden.

Notes to Override Fatigue Rules

- In the Options region of the Target Accounts subtab, deselect the Fatigue Rules Enabled check box and click Save.

- The Fatigue Rule tool also tracks customer fatigue levels and reports on fatigued customers.

Tracking Fatigue for a Campaign Activity

When the system executes a campaign activity, customers who have already been contacted the number of times specified by the fatigue rules are considered fatigued. These members are removed, and not contacted via the activity channel for that particular initiative.

To track the number of times each customer is contacted via the different channels in a given time period, the system will track each contact for a given customer.

Customers who have not exceeded their fatigue thresholds will be contacted as part of the activity's target group. Upon activity execution, the customer's contact count should be incremented, for the date of the activity, for the channel of the activity.

The following figure demonstrates how fatigue rules work when a campaign activity is executed. The system looks up the fatigue counts for all the target group entries, which are eligible to be contacted, for a given activation date, then applies the fatigue rules that have been set up, and removes the fatigued customers from the contact list. The campaign activity is executed for the non-fatigued customers, and the contact count is incremented and recorded.

Fatigue Rules Execution
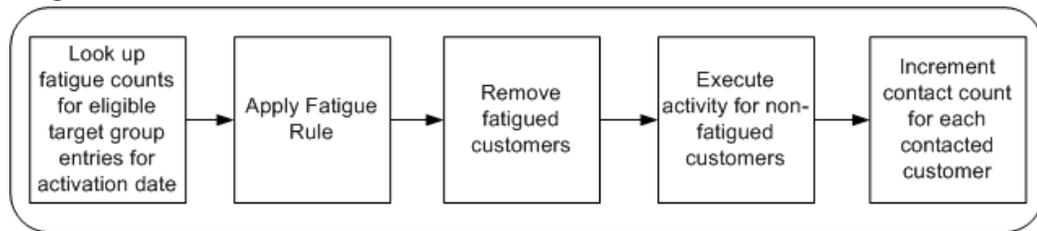
Previewing Activity-Level Fatigue

Use the following procedure to preview fatigue.

Prerequisites

- A direct marketing campaign activity must exist.

- A target group, which has been generated and is in the 'Available' status, should have been associated with the campaign activity.

Using Target Groups

You can define target groups (audience) for your campaign activities and preview the list entries generated in the Target Group midtab.

You can create target groups in the following ways:

- Use a List Template - You can either use the default list template or select a different one from the available list. Additionally, you can modify the selection filters and reorder them before generating the target group. For example, after specifying a product as a selection criterion, you may also want to specify additional conditions based on customer demographics.

- Use an existing List or Segment from the Advanced option - When you use an existing list to create a target group, you can access the suppression, deduplication, selection, and chart options for the list and make required changes. Segments being dynamic, when you select one to base your target group on, it is generated when the activity executes and the resulting list contains the target group for the activity. You can change segment definitions in the Segment horizontal tab of the Audience tab. See Creating and Managing Segments, page 4-21 for more information.

- Select an imported list using the Advanced option

- Select a custom SQL list using the Advanced option

- Use a Discoverer workbook from the Advanced option

Target groups are generated in the Full Refresh mode - that is, using the selection criteria, deduplication rules, and suppression options, the list is recreated as if for the first time.

Indirect marketing activities, such as of type Advertising, are not targeted at a specific audience and therefore target group creation functionality is not applicable to them.

Use the following topics to create a target group for a campaign activity.

Creating a Target Group

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

- List

- Segment

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

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

Prerequisites

- A generated list or segment

- An existing campaign with a campaign activity

Navigation: Campaign Dashboard > Activities > Select an activity > Target Group tab

Notes

- **Generation Type:** If you choose:

  - Full Refresh - when the list is regenerated all the entries from the list are removed and it will be generated afresh as if being generated for the first time.

  - Append New Records - all the list entries from the previous list generation activity will be retained. New entries that meet the specified selection criteria will be added to the existing list. However, if list criteria is modified, then the entries from the previous list generation will not be satisfying the list criteria.

  - Update Attributes Only - if any modifications are made to the customer

attributes in the corresponding data source or Audience, those changes are updated within the list entry records.

- A Control Group is a list of customers or prospects who will not receive the campaign information. Select No Control Group or Using Control Group as appropriate. If you choose to use a control group, enter the percentage of the target group or the count of records for the control group.

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

- **Selection region:** Only the lists and segments with the Available status will be listed.

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

- **Generate List:** Suppression rules (based on suppression list entries with the "Available" status), control group entries, and deduplication rules (based on activity type) will be applied when the Target Group is generated. After the Target Group is generated, the suppression, deduplication, control group, and contact group information is displayed in the Summary region.

- After a target group is generated, you can add entries manually to it. To do so, click the target group name. You will be navigated to the Entries subtab of the Audience Workbench. Select the Add Entries Action. Note that after adding manual entries, if you regenerate a target group in the Full Refresh mode, the manual entries will be lost. Additionally, for activities to which triggers are associated, adding manual entries will result in the target group for the first instance of the activity to be regenerated. See Adding Manual List Entries, page 4-17 for more information on adding manual entries to lists.

    Opt Out: If this field is selected in the search result page, it indicates that the customer (person or organization contact) has opted out from receiving marketing communications from all channels, and should not be selected to be contacted.

Target Group Options

Use the following information to create a target group using a list template. When you use list templates to create a target group, you are using the natural language query method for specifying the target group selection criteria.

Notes

- **Apply Suppression:** The deduplication rule will not only eliminate duplicates within the list, but will also be used in suppressing the records from being targeted. Select Apply Suppression to use deduplication. You can either select a deduplication rule or the application will use the seeded rule according to the channel for the activity.

  Deselect Apply Suppression, for example, if there is a product recall and all the affected customers must be contacted. When suppression is built into the base selection query, you also deselect Apply Suppression.

- **Preview Fatigue:** If fatigue rules have been specified by the administrator, you can view the projected fatigued and projected available counts before deciding to override or retain the fatigue rules.

- **View entries:** After a target group is generated, you can add entries manually to it. Note that because target groups are generated in the Full Refresh mode, if you regenerate a target group after adding manual entries, the manual entries will be lost. See Adding Manual List Entries, page 4-17 for more information on adding manual entries to lists.

Target Group Locking

- To prevent losing of tracking information about customers who are targeted in a campaign, the Target Group is automatically "Locked" when a campaign activity becomes Active and the Target Group selections cannot be modified. This ensures that measurements for the campaign, such as responses, orders, revenue, and so on are measured against a constant set of target customers.

- You cannot change the status of the Target Group even if the status of the campaign activity is changed.

- Although the status of a "Locked" Target Group cannot be changed from the Campaign Workbench (or using the Campaigns functionality), it can be changed from "Locked" to "Available" or "Archived" from within the Audience Workbench.

Creating a Target Group Using the Advanced Option

Use the Target Group subtab to create target groups based on other lists, segments, Discoverer workbooks, list imports, or SQL. You can also create your own SQL conditions.

Prerequisite: Fatigue rules and deduplication rules should have been specified by the System Administrator

When you select the list sources for the target group, the Action in the first row must be Include. The % Requested must be null for the Intersect and Exclude actions.

Defining Control Groups

A Control Group is defined so that a certain set (sample) of target group members are not contacted via a marketing activity. The behavioral difference (response, orders, and so on) between the contact group and the control group are studied to establish the effectiveness and usefulness of the marketing activity.

The control group size is generally a trade-off between the accuracy required for a test sample and the required confidence in the results. If more accuracy and confidence level are required, then a bigger control group size is needed. The target group size considered for control group calculation is based on the final contact-able target group size after all other conditions have been applied.

Control Group Business Scenario
ABC Company wants to promote a new Z-series laptop to young, high-income consumers. The target group members are identified and will be sent a special offer to purchase the Z-series laptop. ABC Corporation wants to hold back a subset of the target group and later study the effectiveness of the campaign by comparing orders from the contacted members and the control group members.

A subset of the target group is held back as control group members. This special offer is not sent to the control group members. After executing the campaign, the order rates of the Z-series laptop between the contact group and the control group members are measured to determine the effectiveness of the marketing activity.

The available methods of determining the control group size are:

- Statistically valid sample size

  It is important that the control group size selected is large enough to have significant results and not so large that the actual target group is reduced at the cost of testing. Therefore, for marketers who are not well versed with what should be the size of a control group, they can use the statistical formula for estimating the optimal sample size to ensure that the results attained are significant enough. The formula for calculating the control group size is a standard statistics formula that has been adjusted for finite populations.

  Example
  For example, the marketer responsible for U.S. introduction of the Z-series laptop is not well versed with typical sizes for the control groups and would like to use the system calculated control group size based on a statistically valid sampling formula. The marketer can change the different parameters in the statistical formula and view the change in the control group size.

- User entered by percentage

  Example
  ABC Company wants to use a best practice of using 10% of the target group size as the control group.

- User entered by count

  Example

  In Europe, the marketers are more experienced in the control group testing and analysis and also have an estimate of the target group size for the campaign. Based on past experience and the estimated target group size, they want to directly specify a count for the control group and not use the system calculated values.

To create a control group for an existing target group:

1. View the target group for the activity in the Target Group tab. The target group must be Draft, Available, or Failed status.

2. In the Options section, click **Define** and set the control group details.

   The Define Control Group page displays the size and status of the target group for reference.

3. Click **Save**.

4. Generate the control group by clicking **Regenerate** or by generating again from the Target Group page. The actual target group enabled entries are utilized for the control group calculation.

5. Click **Update Entries** in the Target tab and view all entries. You can sort the Control Group column to view all entries flagged as control group members.

To define the control group while defining the target group:

The marketer can define a new control group while defining a target group. For a new control group, the marketer defines the size of the control group and the system selects the control group members randomly from the target group. This ensures that the control group members are a representative sample of the target group.

1. Define the target group in the Target Group tab and save the target group definition.

2. In the Options section, click **Define** and set the control group details.

3. Save the control group definition.

4. Generate the target group.

   The control group is applied automatically. Control group members are selected after successful completion of target group generation. If the target group generation fails, then the control group members are not selected and the control group status remains in Draft status. If the target group generation is successful, then the control group status is Available.

5. Click **Update Entries** and view all entries. You can sort the Control Group column to view all entries flagged as control group members.

Notes for Statistically Significant Sample Size:

You are a marketer for ABC Company and are responsible for planning and executing a campaign to cross-sell an accessory to the Z-Series laptop. You target the customers who already bought the Z-Series laptop and you want to send them a special offer for taking 10% off an accessory. You decide to hold back a certain set of random target people as a Control Group and not send the offer to these.

Your assumption is that sending the special offer to a certain set of people has an affect on them and that they will buy the accessory more than the control group people. What should be the size of your control group? The size of the control group should be significant enough that assuming you had not sent the offer to the entire target group, the results of the control group study would be representative of the entire target group. Your target group size = 1000. Your control group size as n.

*   **Confidence Level**: The confidence level measures the degree of certainty associated with the test. The larger the sample, the surer you can be that the responses truly reflect the population. Available confidence values are 80%, 90%, 95%, and 99%. The default is 95%.

    Example
    After the campaign, assume that none of the n Control Group members bought the accessory. Then, how confidently can you state that if you had not given the offer to (1000-n) people, they also would not have bought any accessory? If you want to be 100% confident in stating the above, then obviously your sample size, the number of people you don't send the offer to, should be the entire population of 1000. If you want to be 95% confident, then the sample size is calculated using a constant Z that is statistically derived from the 95% number. The value of Z is found in statistical tables.

*   **Required Response Rate**: The response rate is the approximate result expected from the total population or the estimated proportion of an attribute that is present in the population. If there is no idea about the proportion of the attribute, then generally a 50% response rate is used, as that will provide the largest sample size.

    Example
    In the example, if the marketer knows that generally cross sell campaigns with offers like these generate a 2% response: 2 out of every 100 targeted will buy the accessory. Then the 2% response rate is used to determine the sample size. The response rate is also known as Expected Proportion or percentage picking a choice. In our scenario, the choice they have is whether they avail of the offer or not.

*   **Error Limit**: This is the percentage limit of error. The Error Limit (also called Confidence Interval) is the range in which the true value of the target group is estimated to be.

Example

Adding on the previous example, if the limit of error was 0.3%, then you can be 95% confident that the response rate from the total target group will be between (2%-0.3%) and (2%+0.3%).

The following formula is a standard statistics formula for calculating the Sample Size for an infinite population when the population size is not known.

Sample Size (SS) = (Z2 x R x (100-R)) / E2

Where Z = Confidence Level (a constant)

R = Response Rate needed from the Target Group

E = Required Limit of Error

The statistical formula with a correction for finite population is:

Control Group Size = SS / (1 + ((SS-1)/ target population))

Example

If the Target Group size is 1000, then:

Z= confidence level required 90% = 1.645

R = Response Rate = 10%

E = Error Limit = 2%

SS = 1.645 * 1.645 * 2 * (100-2) / .3 * .3 = 530.38 5893.1211

Control Group Size = 530.38 / (1 + (530.38 –1)/1000) = 346

This means that in order to be 90% confident that you will get a response rate of 10%, you need to have a control group of 346 entries.

Notes on Regeneration:

You can regenerate the control group itself or both the target group and control group.

- If the target group is in Available status, the marketer can choose to generate the control group by itself. Click the Regenerate button. Regenerate will deselect all previously selected control group members and select new control group members.

- If the Target Group is regenerated in Full Refresh mode then the Control Group members are re-identified (using the same control group definition).

- If the target group is regenerated in Update Attributes mode, then the control group members are not re-identified and the attributes of the control group entries are not updated as these are disabled entries.

- If the target group is regenerated in the Append New Records mode, then the control group members are not reselected.

Notes on Repeating Activities and Control Groups:

Assuming the base activity has a control group defined, the subsequent copies of the activity for repeating purposes copy the target group definition and the control group definition of the original activity. There are two options you can set for how repeating activities use the target and control groups:

- **Repeat to All Target Group Members**: When a copy of the original activity is created, both the target group and the control group definitions are copied.

- **Repeat to New Target Group Members**: When the new activity is created, the target group definition of the original activity is copied and the previously executed target group members are excluded from the new target group members. The control group definition is carried over so that new control group members can be selected from the new target group at each execution.

Control Group Analysis Report

Use the Control Group Analysis Report to compare metrics between the control group and the contact group for an activity in a graphical and tabular format. Your administrator defines the metrics available for comparison in this report.

Notes

- Navigate to the report using the Reports Dashboard.

- Search by a specific activity or campaign. Use the LOV to select the activity or campaign.

- Only campaigns or activities with the status Active, Completed, Closed, or Archived can be used in this report.

- You must be on the team with financial access to the activity or campaign. You can also run reports on non-confidential campaigns.

- The campaign search results lists the activities corresponding to the campaign. Click View Report to display the report for the activity.

- Select the compare metric to be used in the comparison between the control group and the contact group.

- **Lift**: The difference in metric value between the contact group and the control group is the positive or negative lift associated with a particular campaign. The lift is stated as a percentage.

- **Chart**: The chart displays the comparative percentage for the contact group and control group based on the selected metric.

- **Size**: The count for the target group, contact group and control group are in the Size column.

- **Metric Value**: This is the value for the selected metric for each of the groups.

- **Metric Rate**: This is the percentage for the selected metric value divided by the group size.

Related Topics

See the *Oracle Marketing Implementation Guide* for information about setting up the metrics for this report.

Costs, Revenues, and Metrics for Activities

To analyze the effectiveness of marketing activities, marketing managers need metrics tracked at individual campaign activity levels and across campaigns. Costs and revenue details are captured and tracked for return on investment (ROI) calculations. Other seeded metrics are also tracked and reported for the different campaign activities. For specific business needs, the marketing administrator can define additional metrics.

Metrics Overview

Metrics are measurements for tracking the effectiveness of marketing activities. Metrics can be associated with each of the following marketing objects:

- Programs

- Campaigns

- Campaign Activities

- Events

- Event activities

- One-Off Events

- Deliverables

Metrics include both forecast and actual values. These values are either manually input or automatically calculated by the Oracle Marketing application.

Metrics can also be used to initiate Campaign Monitors. For example, a Responses Count metric that attains a desired value could be used to start a follow-up campaign activity to a larger audience.

Three categories of metrics are available for the Campaign Workbench: general metrics,

costs, and revenues. General metrics include the number of responses to a campaign and the number of registrants for an event. Cost metrics are used to track expenses and revenue metrics are used to track the income associated with marketing activities.

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

Metric Categories

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

Metric Hierarchies

Metrics are organized into two hierarchies:

- A Summary Hierarchy within a marketing object

  Within a single marketing object, metrics of similar categories (Cost, Revenue, Response, and so on) are organized into Summary Hierarchies.

- A Rollup Hierarchy between marketing objects

  The Rollup Hierarchy enables metrics from lower level marketing objects (such as Campaign Activities and Event Activities) to be rolled up to parent objects (Campaigns and Events) and grandparent objects (Programs).

  Figure Example to Demonstrate Summary and Rollup Metrics shows the typical structure for a Summary and Rollup Metric hierarchy. Various individual costs are summarized at the activity level and also roll up to the campaign level.

Example to Demonstrate Summary and Rollup Metrics
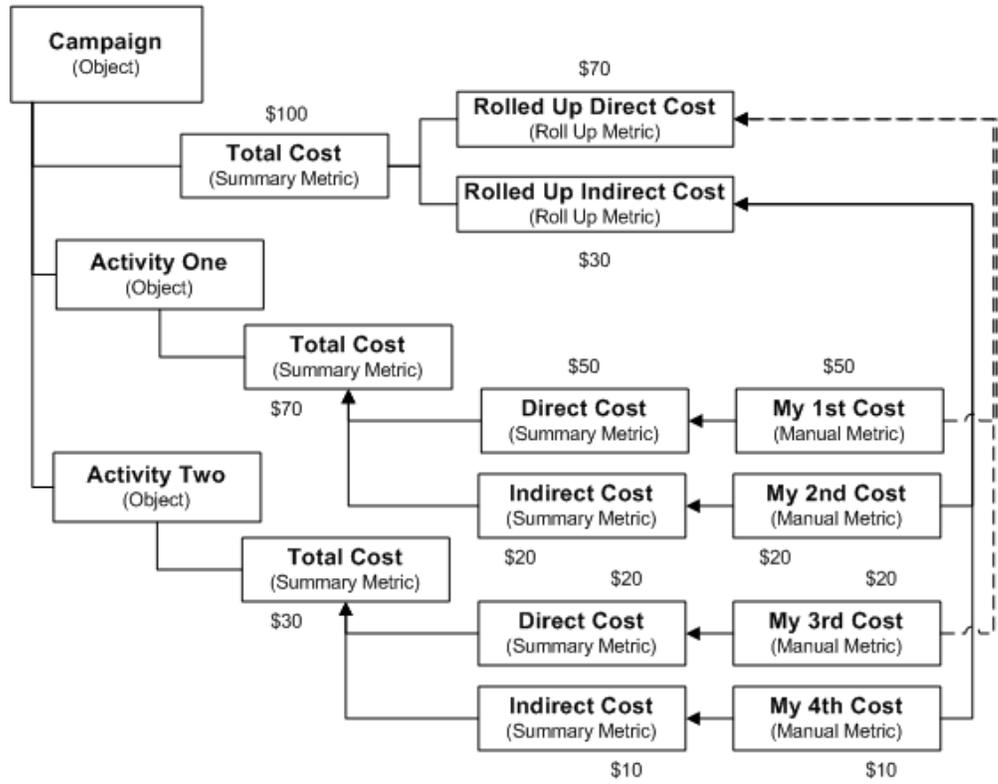
Metric Calculation Types

The metric calculation type determines the way in which forecast and actual values for a metric are entered into the system. For different business requirements, marketers need different calculation types:

- Function

  These receive their actual values from a custom PL/SQL function or stored procedure. This function or procedure contains logic for calculating the actual value based on information within the Oracle E-Business Suite. Function metrics are associated with the marketing objects at the lowest level in the hierarchy, such as campaign activities and event activities. You can enter them as values directly or they can be calculated by the system. For example, number of responses to the activity may be input manually and the actual total postage cost for a activity may be calculated by multiplying the actual unit cost with the target group number. The forecast values for function metrics are entered manually into the system.

- Formula

  To calculate the effectiveness of marketing objects based on composite values,

administrators can define formulas using relevant metrics and operators. For example, you can set up a formula as Response Rate = Number of Responses/Target Group Size. If the Number of Responses is 10 and the Target Group size is 100, then Response Rate = 10/100 or .1. Seeded formula metrics are available to measure effectiveness of each stage of the marketing cycle.

- Summary

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

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

- Roll up

  These metrics receive both forecast and actual values from lower levels in the marketing object hierarchy and provide comprehensive metrics to evaluate marketing effectiveness. Manual, function, and formula metrics within a lower level object (example, Campaign activity) can be linked to a rollup metric in a higher level object (example, Campaign). In addition, all child metrics of a rollup metric must be in the same metric category (Cost, Revenue, Response, and so on).

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

- Manual

  For these, both forecast and actual metric values are entered manually.

Metric Templates

Metric templates help marketing administrators to standardize the metrics to be associated with a campaign activity. For example, an administrator may define a metric template that automatically associates costs that are specific to the telemarketing activities of a call center. Each type of campaign activity and marketing object has an associated metric template.

When a campaign activity is created, for ease of use, all the metrics associated with the activity type are enabled via the associated template. You only need to enter the metric values. If necessary, you can also create and associate additional cost, revenue, or other metrics with a activity.

Metric templates can be associated with a marketing object (campaign, campaign activity, event, and so on) or a custom set up. When you create a marketing object with

a particular custom set up, the metrics available for that particular object will include the metrics included in the metric templates associated with that custom set up and those included in the metric templates associated with that particular marketing object type.

For example, let us assume that you are creating a campaign 'live it up' with the custom setup 'ABC'. Prior to creating this campaign, you created a metric template 'AA' with metrics A1, A2, and A3, and associated it with the custom setup 'ABC'. You had also created another template 'BB' with metrics B1, B2, and B3, and associated it with the marketing object of type 'Campaign'. The campaign 'live it up' will include the metrics A1, A2, and A3 from metrics template 'AA', which is associated with the custom setup 'ABC', and B1, B2, and B3 from the metrics template 'BB', which is associated with the marketing object of type 'Campaign'.

Metrics Refresh Process

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

During the metrics refresh process, the following actions occur:

- Actual values for all function metrics are refreshed based on information from the Oracle E-Business Suite. For example, the actual value of the seeded function metric for Responses Count is refreshed based on the total number of campaign response records within the Interaction History table for each campaign source code.

- Forecast and actual values for all summary metrics are refreshed based on their subordinate metrics in the summary hierarchies.

- Forecast and actual values for all rollup metrics are refreshed based on their child metrics in the rollup hierarchies.

- If the optional "Update History" parameter is enabled, the previous period's metric values are copied to the Metrics History table to allow for historical analysis.

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

Seeded Metrics

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

User-Defined Metrics

In addition to the seeded metrics, user-defined metrics can be used for measuring

marketing objects. Refer to the *Oracle Marketing Implementation Guide* for details on defining user-defined Metrics.

Metrics Example

The following scenario demonstrates the various metrics concepts in Oracle Marketing.

Your organization, 'Just For You', plans to introduce a new line in clothing for the coming fall season. Its marketing team wants to run a campaign (Fall In Place) and send an information brochure by a direct mail campaign activity (Fall Lines Print Campaign activity) to all the customers who bought clothing from 'Just For You' last fall.

As the marketing manager, you want the overall costs and individual cost components for the campaign tracked. To do so, you need to track costs at the Campaign level and the campaign activity level.

Your Administrator will create:

- Rolled Up Direct Cost and Rolled Up Indirect Cost as roll up metrics and Fall In Place Campaign Total Cost as the summary metric

- Fall Lines Print activity Cost as a summary metric at the campaign activity level

- Fall Lines Print activity Postage Costs as a manual metric (this will be summarized to Fall Lines Print activity Cost at the campaign activity level and will roll up to the Rolled Up Direct Cost at the campaign level)

- Fall Lines Print activity Envelope Costs as a manual metric (this will be summarized to Fall Lines Print activity Cost at the campaign activity level and will roll up to the Rolled Up Direct Cost at the campaign level)

You need to perform the following activities:

1. Create the Fall In Place Campaign

2. Create the Fall Lines Print Campaign activity

3. Associate Fall In Place Campaign Total Cost as a summary metric with the campaign

4. Associate the manual metric, Fall Lines Print activity Postage Costs to the Fall Lines Print Campaign activity

5. Associate the manual metric, Fall Lines Print activity Envelope Costs to the Fall Lines Print Campaign activity

The costs are then captured as follows:

- The summarized Fall Lines Print activity Postage Costs will be rolled up to Fall In Place Campaign Total Cost

- The summarized Fall Lines Print activity Envelope Costs will be rolled up to Fall In Place Campaign Total Cost

Associating Costs, Revenues, and Metrics for Tracking

Use the Tracking tab to view, enter, and associate costs, revenues, and metrics. The Views available to you for associating tracking metrics to a campaign activity include Costs, Revenues, Metrics, or All. For each of these, you have the Details view that shows a table or the Hierarchy view. You can see the history for any metric and post actual costs to the budgets.

Prerequisite: The costs, revenues, and metrics that you want to add were set up by your administrator

Navigation: View an Activity in the Campaign Dashboard and select the Tracking tab.

Notes for Adding Metrics

- **Variance**: For costs the variance is forecast minus actual. For revenue and all other metrics the variance is actual minus forecast.

- **Variance %**: The costs variance percentage is forecast minus actual divided by the forecast. Revenue and other metrics are actual minus forecast divided by forecast.

- Click the History icon next to a metric to view a history of actual values for the metric, both in a table and in a trend graph. Enter search criteria to specify the time period and increments to show in the history. You can choose to see the history information in a cumulative or incremental view.

- Click Add to view all available metrics of the type currently viewed (cost, revenue, metric, or all). Click Apply to add the new metric. It appears at the top of the table in Details view.

- After an activity is activated, the metrics concurrent program must complete before various metrics are updated and displayed. This may take some time.

- Metrics can only be removed before the activity becomes active.

- Only manual, function, and formula metrics can be removed. Rollup and summary metrics cannot be removed. Summary metrics are automatically removed when all metrics included in the summary are removed.

Notes for Posting Costs

- You can post actual costs for the displayed metrics that are of the cost type.

- You can only post costs to an active activity.

- You can only post costs for manual and function costs.

- Actual cost can be entered once and not updated.

- Posted costs are proportioned across all budgets that the activity is sourcing from.

Associating Partners with Campaign Activities

Marketers may assign partners, such as Value Added Distributors (VADs), Value Added Resellers (VARs), agents, and so on, to campaign activities. When the leads generated are converted to opportunities, they may be distributed to the associated partners. Vendors can do this assignment either manually or by invoking the partner-matching engine. Refer Oracle Partner Relationship Management (PRM) documentation for information on how partners may work with the opportunities assigned to them.

Navigation: View details for either an activity or a campaign > Partners mid-tab

Notes

- **Partner Name:** If you have the necessary permissions to access the PRM module of the application, clicking this link will navigate you to the Partner Details page. Otherwise, Partner Name will be available as read-only information. Permissions are based on PRM security mechanisms. Refer Oracle Partner Relationship Management (PRM) documentation for more information.

Understanding and Using Activity Operational Reports

The Operational Reports available in the Campaign Workbench help you track marketing activities, analyze their effectiveness, and plan future campaigns.

Tracking Across Campaigns

For tracking across campaigns, the Campaign Dashboard contains reports that help you assess campaign performance and perform precampaign analysis when planning new marketing initiatives.

Tracking Individual Campaign Activities

Campaign activity specific reports help you analyze the effectiveness of each campaign activity. The sections displayed in a report depend on the activity's channel of execution. For example, for an e-mail activity, Click Through Destination Analysis information is displayed. The reports contain the following information:

- Performance Metrics: This section displays metrics from across the enterprise, including information about responses, leads, quotes, orders, and revenue

- Target Tracking History: This section displays target group tracking and fatigue rule information, including Target Size and Target Group Contacted

- Channel Specific Details: This section displays information specific to the campaign activity channel, including details of the outbound content sent

- Repeating Details: For repeating activities, this section displays information on repeat execution

- Click Through Destination Analysis: This section also contains Web script related information, when relevant.

- Website Response Handler Response Statistics: This section includes information on the pretty URL , the responses generated by its deployment, and Web script usage information. All interactions are tracked as anonymous interactions.

  Note: For Web ads and Web offers that are deployed on third party Web sites, pretty URL usage is not tracked or reported.

Channel Specific Tracking and Reporting

For reviewing channel effectiveness, you can view channel specific reports that display the following:

- For e-mail, print, and fax campaign activities, outbound collateral sent to customers, including version sent. You can drill down and view individual content items or preview a specific version

- For non-direct marketing activities, such as advertising, the collateral content items such as billboard ads and images for ads that were live when the activity was aproved. You can preview the versions of the content items.

- E-mail details for e-mail schedules, including click-through destination analysis - destination and click-through details, such as number of clicks and number of unique clicks - fulfillment statistics, response statistics, and scripting reports

- All the leads generated from Sales activities

- For direct marketing print and fax activities, and advertising and other indirect channel activities, information about the Landing Page URL, Additional URL parameters, Click Through Action, Click Through Association, Total Responses, Total Anonymous Responses, and Total Unique Responses. Both identified and anonymous customer interactions via the Landing Page URL are tracked and recorded in Interaction History

- For the Web channel, see Understanding Web Reports, page 13-9.

Tracking Repeating Activities

For repeating activities, details of target groups and fatigue rules applications are tracked and reported for each iteration of the activity. You can drill down to view channel-based information.

Target History Reports

You can use the Activity Targeting History and Channel Targeting History reports to view fatigue history. These reports will help you examine targeting performance by direct marketing channels.

Activity Targeting History

This report displays fatigue details by campaign activities executed for all direct marketing channels. For the activities in a date range or for a campaign, you can compare the target group sizes with the number of members contacted, fatigued, and suppressed. You can sort the report to view the activities with the largest contact rates and largest removal rates. You can restrict the search criteria to view activities for one particular channel only. You can drill down to view fatigue details for each activity. For repeating activities, the Repeating icon is enabled and you can drill down by date, week, or month to view fatigue details for each activity iteration.

The Fatigue Rate displayed is calculated as follows:

(Total Contacted/Total Fatigued + Total Contacted)*100

When you drill down using the Total Fatigued link for an activity, details of the activities that took away contacts from this activity are displayed

The total displayed for each column in the report is the grand total for all activities or all channels. The totals provide a global view of all fatigue data for the specified criteria.

Access to activities is controlled by team security. The report will display schedules that you have read access to. Confidential activities will not be displayed unless you have access to them.

Channel Targeting History

This report displays fatigue history by channels. For a specified date range or campaign, activity fatigue details are summarized and displayed by channels. You can drill down to view fatigue details for each channel by date, week, or month.

Using the View History icon, you can view fatigue details for a specific channel, for a specified date range as displayed in the following figure.

A Sample Channel Execution History Report

Channel Execution History: Telemarketing

Display Channel Execution by [Date ▼]   (Go)

Date	Target Group Size	Control Group Size	Total Fatigued	Fatigue Rate(%)	Total Suppressed	Total Deduplicated	Total Contacted
10-DEC-2003	819	0	408	100	0	411	0
27-FEB-2004	2808	0	1310	49	0	162	1336
29-FEB-2004	12	0	12	100	0	0	0
04-MAR-2004	838	0	376	81	0	378	84
08-MAR-2004	2	0	0	0	0	0	2

Use the following procedures to view the different operational reports.

Viewing an Activity or Channel Specific Fatigue Report, page 11-39

Viewing Campaign Activity Specific Reports, page 11-39

Viewing an Activity or Channel Specific Fatigue Report

You can choose to view the fatigue history for a specific period and/or for a specific campaign. You can also choose to view fatigue information across activities or for a specific channel. You must enter at least one search criteria to view the report.

Navigation: Campaign Workbench > Reports Dashboard > Target History

Viewing Campaign Activity Specific Reports

You can view campaign activity specific reports using different navigation:

- Click the Activities List shortcut link on the Campaign Dashboard and click the Reports icon

- Click the Campaign Hierarchy shortcut link on the Campaign Dashboard and click the Reports icon

- Select the activity from the My Recent Schedules bin on the Campaign Dashboard and click the Reports button

Prerequisite: Campaign activity must exist and tracking metrics should have been defined

Notes

- To view a Web Script report, click the Web Script Report icon in the Click-Through Destination Analysis region.

- For e-mail, fax, and print activities, click the Current Live Version link in the Outbound Content Sent region to view the version history of the outbound collateral.

12

Creating Advertising Activities

This chapter covers the following topics:

- Overview of Creating Advertising Activities
- Defining Advertising Collateral
- Using Landing Page URLs for Response Tracking
- Defining Landing Page URLs

Overview of Creating Advertising Activities

Advertising activities include such things as billboards, TV and radio advertising, and ads in newspapers and magazines. Use this procedure to create an advertising campaign activity.

Steps:

1. Define advertising products and offers, page 11-11.

2. Define advertising collateral, page 12-2.

3. Build tracking URLs, page 12-2.

4. Define costs, revenues, and metrics, page 11-35.

5. Define budgets.

6. Execute advertising activities.

7. Track advertising activities.

Related Topics

Troubleshooting Advertising

Defining Advertising Collateral

Marketers can associate and track outbound collateral content usage for non-direct marketing activities such as advertising. You can define and attach to activities media clips, print ad content, billboard content, and wave files. You can associate collateral to the following channel categories:

- Advertising

- In-store

- Press and Analyst Relations

Use the Collateral tab in the Campaign Workbench to add, delete, and create collateral to associate with your advertising activity.

Notes

- The name of the content group type is External Collateral.

- You can associate content items that are not yet approved, but they must be approved before activities can be approved and become active.

- To create a new content item, select the content type and click Go. You create the item in Oracle Content Manager, and then return to your Marketing Activities page where the item is automatically associated to your advertising activity.

- You can preview content even before your associations are saved.

Using Landing Page URLs for Response Tracking

The Landing Page URL functionality enables marketers to define Landing Page URLs and their associated tracking URLs for Advertising, Print, and Fax activities. Use the following sections to understand and create Landing Page URLs.

- Overview, page 12-2

- Landing Page URL Definition Process, page 12-3

- End-User-Experience Process Flow, page 12-4

Overview

Typically, click through destination (CTD) URLs are cryptic and clumsy to handle. Landing Page URLs are short and make it easy and simple for end users to remember and use them.

For example, the Landing Page URL " http://www.oracle.com/start" is easier to

remember and use than the CTD URL
"http://qapache.us.oracle.com:22883/amsWebTracking.jsp?ctdid=17000&sccd=WORLD0
205000117&objid=13763".

Using inbound response tracking through Landing Page URLs, marketers can
accomplish the following:

Invite Advertising Activity Responders Through Web Channels

Consider the following business scenarios:

- A newspaper advertisement requests readers to use a Landing Page URL and take a
  Web survey. Responders to the survey receive a gift. All accesses to the survey are
  tracked and reported for the newspaper advertisement campaign activity.

- A television commercial advises viewers to use a Landing Page URL to visit the
  company's online store where discounts are being offered for select products. All
  accesses to the online store via the Landing Page URL are tracked and reported for
  the television commercial campaign activity.

To track responses to indirect marketing channels such as advertisements, marketers
can associate specific inbound communication or response-handling Websites (URLs)
for such campaign activities and track the number of responses.

Publish Web Activities on Third Party Affiliate Sites

To maintain optimal Web presence and to attract customers and prospects who browse
the Web frequently, companies must place Web ads on strategic third party Web sites.

A typical scenario to demonstrate how a marketer may use this functionality:

A company places an advertisement on an external Website, such as Yahoo or CNN.
When Web visitors click the ad image, they are taken to the company's Website to
register for an event. The clicks generated by this external ad are tracked and reported
for the campaign activity that placed the ad on the external site. These reports can be
used by the marketers to assess the effectiveness of the Web ad.

Landing Page URL Definition Process

The following figure depicts the process for defining the Landing Page URL.

Process Flow for Defining a Landing Page URL
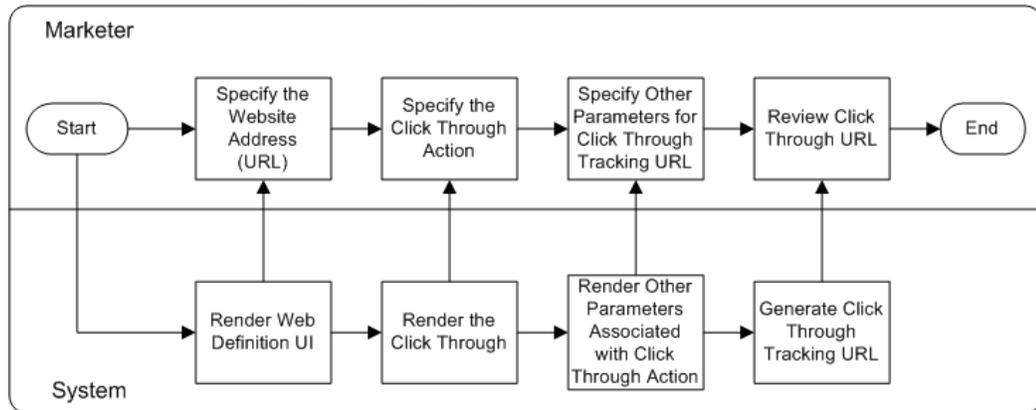
End-User-Experience Process Flow

The following is a sample flow depicting an end user's experience with a Landing Page URL leading to a survey with custom authentication:

1. View a TV advertisement or a billboard where the Landing Page URL is specified.

2. Type the Landing Page URL in a browser window.

3. If necessary, provide authentication information by logging in with a user id.

4. Optionally, provide any necessary additional data.

5. Complete and submit the survey.

Defining Landing Page URLs

You can define Landing Page URLs in the Collateral subtab for Fax, Direct Mail - Print, and broadcast channel activities.

Notes

- **Landing Page URL:** Enter an easy-to-use URL that must be displayed for the advertising, print, or fax activity. For example, http://www.oracle.com.

- **Additional URL Parameter:** You can use this field to track responses at a granular level when the same Landing Page URL is used for multiple activities at the same time. The Landing Page URL and the Additional URL Parameter specified are concatenated by the system to arrive at the Complete Landing Page URL. The Complete Landing Page URL must be unique across the currently Active campaign activities. If this URL is not unique, a message is displayed, including information about the activity that already uses this URL and the activity owner.

The following example demonstrates how the additional parameters may be used.

Example

The Landing Page URL "http://www.oracle.com/10gRegister" points to the 10G launch event registration page. A TV advertisement activity and a newspaper advertisement (in the Chronicle) activity both use this Landing Page URL to invite customers to register for the event.

The two activities have additional URL parameters, say "TV" and "Chronicle" associated with them respectively, so that user clicks can be attributed to the respective activities.

During execution, when users enter "http://www.oracle.com/10gRegister" in a browser window, they may be asked where they heard about the promotion. Based on their responses, the additional URL parameter is added to the Landing Page URL as:

- http://www.oracle.com/10gRegister/TV or

- http://www.oracle.com/10gRegister/Chronicle

These two URLs are the Complete Landing Page URLs. They are now unique and independent of each other, and are tracked as such, even though they both lead to the same destination. This additional information is also used internally by the system to make the Landing Page URL unique across the currently Active campaign activities.

- **Click Through Action**: The default click through action is Go to URL. However, you may choose from a list of actions and specify parameters based on the action chosen.

- **Click Through Tracking URL:** After you have provided all the necessary information, the system will generate and display the Click Through Tracking URL, that may be passed to third party Web sites to deploy advertisements or Web surveys. Clicks on such advertisements or survey responses will be tracked and reported in the operational reports associated with the schedule. If customer authentication is done before the Click Through Tracking URL is launched, responses will be logged and reported as identified responses. Otherwise, responses will be logged and reported as anonymous responses.

- After the schedule is approved, you cannot modify the Landing Page URL definition details.

13

Creating Web Activities

This chapter covers the following topics:

- Overview of Web Marketing
- Understanding Web Activity Types
- Creating a Web Ad or Web Offer
- Associating a Product or Offer
- Associating a Web Ad or Web Offer to a Placement
- Creating and Associating a Target Group
- Associating Costs, Revenues, and Metrics for Tracking
- Understanding Web Reports

Overview of Web Marketing

Along with other traditional marketing channels such as e-mail, Fax, direct mail, and advertisements, marketers today want to leverage Internet capabilities for marketing activities. The business benefits of Web marketing include direct, quick, and personalized interaction with customers, real-time message transfer, targeting highly specific market segments, and selling directly and immediately.

Using the Web Marketing functionality, you can create Web activities to cross sell, up sell, or make "buy this also" recommendations on the Web. When a Web activity executes, the resulting content is rendered on placements (physical locations) on applications such as Oracle *i*Store, *i*Support, Partner Portal, or other custom Web sites.

You can include images and text as content to be rendered on the Web. Content is created and managed in Oracle Content Manager so that they are maintained and version controlled centrally. Oracle Marketing integrates with Oracle Content Manager to give you access to published or live content that you want to send to a specific location on a Web site.

The following table describes the various objects associated with Web marketing.

Web Marketing Entities

Entity	Description
Web Activity	A Web activity is a campaign activity that executes over the Web channel. There are three types of Web schedules: • Web Ad - An activity, when executed, renders content (image and text) on the Web. You would use a Web Ad to promote a product. • Web Offer - An activity, when executed, renders content (image and text) with associated offers on the Web. You would use a Web Offer for offers like price discounts. • Web Dynamic Recommendation - An activity that renders recommended product(s) based on marketer-defined context. You would use a Web Dynamic Recommendation for promoting the accessories of whatever product the online visitor happens to be viewing. • For each type of Web activity, you need to define a specific set of parameters in the Activity Details page. See Understanding Web Activity Types, page 13-5 for more details.
Product	A product or product category can be associated with a Web Ad or Web Offer.
Offer	An offer represents some pricing discounts for a product or a set of products. For example, 20% off on a product. It is defined independently in Oracle Marketing. More than one offer can be associated with a Web Offer activity.

Entity	Description
Application	Applications are either Oracle applications that are accessed as Web sites (for example Oracle *i*Store), or a label given to a specific custom site. Supported applications include Oracle *i*Store, Oracle iSupport, and Oracle Partner Portal. Labels can be created for custom non-Oracle application driven sites.
Web Placement	A Web placement is a defined area in a Web site that will display the content that results when a Web activity is executed. When you create a Web Placement, you are creating a logical representation that points to the physical location where the content will be displayed on the Web.
Content Types and Content Items	Content types define the type of content that can be displayed in a given Placement. Each content type can have one or more Style Sheet associated with it. Each Placement can be associated with one or more content types. When Placement X is chosen for an activity, only content items that are of Content Types defined for Placement X can be used for Placement X.Content items are specific instances of content types.
Style Sheet	A Style Sheet defines how the content type is actually displayed in a Placement.
Rules	Rules define the context, relationships, and conditions based on which a product or product set gets recommended. Rules are associated only with Web Dynamic Recommendation activities.
Target Group	When set, the target group for a given web activity limits the execution of this Web activity to online visitors that belong to the specific target group. If not set, the activity applies to all online visitors.

Entity	Description
Click-Through Destinations (CTD)	CTDs define what happens when the content item or content item component associated with it is clicked. An example of a CTD is "Go to url: www.oracle.com".
Web Script	Web Scripts are created using Oracle Scripting and can be used to present questions and get responses from online visitors, as in a survey for example. Web Scripts are used through the Click-Through Destination "Go to Web Script".

The workflow for Web marketing from the Campaign Workbench is as follows:

1. Create a placement.

2. Create a Web activity.

   1. Specify the basic attributes for the Web activity.

   2. Associate the product, offer, or relationship for the Web activity. Your selection will depend on whether you are creating a Web Ad, Web offer, or Web Product Recommendation. See Define web offers, page 13-7and Understanding Web Activity Types, page 13-5 for more information.

   3. In the Target Group tab, associate a target group, page 13-9for the Web activity, if desired.

   4. In the Web Planner subtab, associate a Placement to the Web activity.

   5. Specify a title for the Placement, if desired.

   6. Select a content item for the Placement.

   7. Define costs, revenues, and metrics, page 13-9.

   8. Submit the Web activity for approval. When approved, the Web activity will execute on the specified launch date and for the specified duration.

3. Execute web activities. See the *Oracle Marketing Implementation Guide*.

4. Track web activities. See Understanding Web Reports, page 13-9.

Understanding Web Activity Types

You can create three types of Web activities: Web Ads, Web Offers, and Web Dynamic Recommendations from the Campaign Workbench.

Web Ad Activity

A Web ad is an activity the execution of which results in one or more content (typically image or text) being displayed on a Web page. You can use Web ads to improve product brand or company awareness or to alert customers of new products or deals. You can choose to target the Web ad at specific customers or target all the visitors to the Web site.

The following figure depicts the process flow of campaign activities of type Web Ad or Web Offer.

A Web Ad or Web Offer Process Flow
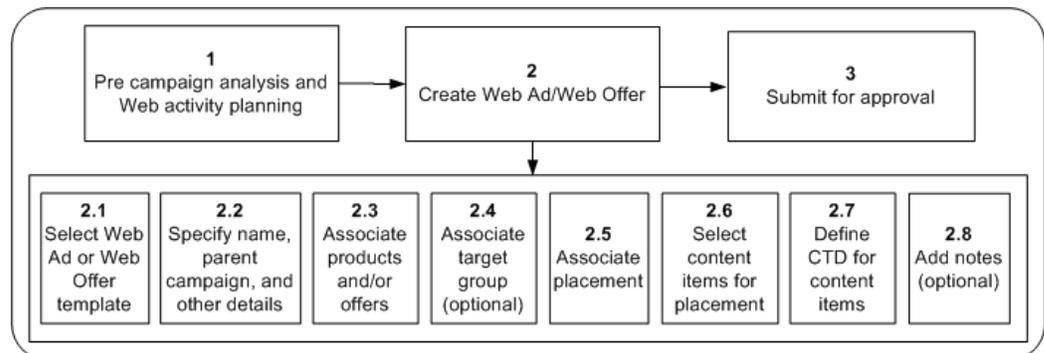
The tasks in a Web ad or Web offer flow logically as follows:

1. Performing precampaign analysis and activity planning.

2. Creating a Web ad or offer, that includes:

    1. Selecting an appropriate template.

    2. Selecting a purpose.

    3. Selecting the parent campaign.

    4. Associating products and/or offers to the activity.

    5. Optionally, associating a target group.

    6. Associating placement and selecting content items for it.

7. Defining CTD for the content items.

8. Adding notes, if desired.

A sample scenario

Vision Enterprises, which produces computer hardware, plans to launch its new sleek monitors. To promote the new product, its marketing manager will create a Web Advertising activity that will advertise the product on Vision *i*Store's Home page.

Web Offer Activity

A Web offer activity is similar to a Web ad, but with an offer associated with the content it renders. You can create Web offers to make marketing offers to customers. For example, buy a product and get an associated product free. You can choose to target the Web ad at specific customers or target all the visitors to the Web site.

A sample scenario

Vision Enterprises, which produces computer hardware, plans to launch its new sleek monitors. To promote the new product, its marketing manager will create a Web Offer activity that will display an offer on Vision *i*Store's Home page - a 10% discount on the price for those customers who purchase the product in the first one month of the launch.

Web Dynamic Recommendation Activity

A Web product recommendation activity results in a product or set of products to be recommended, and the associated product image (not an ad) that is pulled from *i*Store's media object library.

The following figure depicts the process flow for a campaign activity of type Web Dynamic Recommendation.

A Web Dynamic Recommendation Process Flow
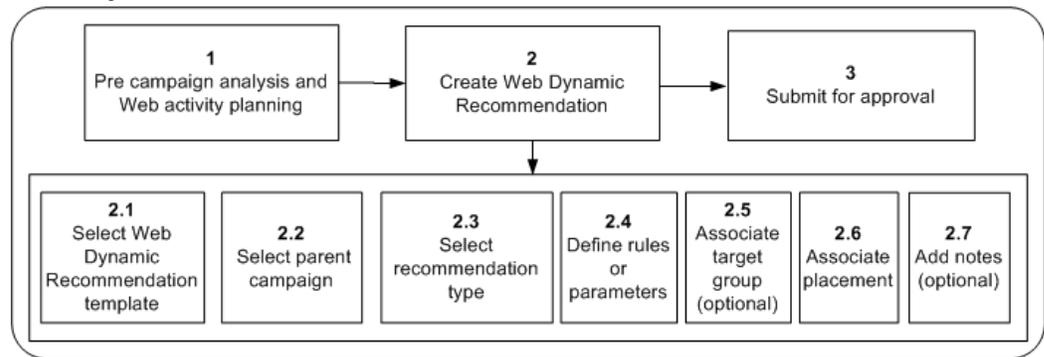
The tasks in a Web Dynamic Recommendation flow logically as follows:

1. Performing precampaign analysis and activity planning.

2. Creating a Web Dynamic Recommendation, that includes:

    1. Selecting the appropriate template.

    2. Selecting the parent campaign.

    3. Selecting the Recommendation type.

    4. Defining rules.

    5. Optionally, associating a target group.

    6. Associating placement.

    7. Adding notes, if desired.

Product recommendations are made based on a set of defined rules. These rules are defined on the basis of a Recommendation Type from the Offering subtab. Each recommendation type has its own definitions. Oracle Marketing comes with the seeded recommendation type: Understanding Product Relationship Recommendation Type.

For product recommendations to be based on how products are related, select Relationship as the Recommendation Type. For example, if Product A must exist before Product B can be utilized, create a recommendation for Product A based on the 'Prerequisite' relationship to an audience that is showing interest in Product B.

Creating a Web Ad or Web Offer

You can place a Web Ad or Offer in placements defined for a Web site, such as Oracle *i* Store by creating a campaign activity of type Web Ad or Web Offer.

Entering Basic Details

Use the following information to enter the basic details for a new Web Ad or Web Offer.

Prerequisite: A campaign and a placement must exist

Navigation: Campaign Dashboard > Create Activity

Notes

- **Template:** Select Web Advertising to create a Web ad activity or Web Offer to create a Web offer activity.

- **Campaign:** Select a campaign as the parent for the activity. Metrics associated to the activity will roll up to it.

- **Launch On and End On:** The start and end dates for the activity must be within the parent campaign's start and end dates.

Related Topics

See the *Oracle Marketing Implementation Guide* for information about creating web placements.

Associating a Product or Offer

Use the Offering subtab to associate a product or product category with a Web Ad and an offer with a Web Offer.

Prerequisite: A Web Ad or Web Offer activity should have been created

Notes

- For a Web Offer activity, offers associated with a product or product category are available for selection.

Associating a Web Ad or Web Offer to a Placement

A placement is a specific location on a Web site where a Web Ad or Offer will be hosted. A Web Ad or Offer is associated to a placement in the Web Planner subtab of the Activity Details page.

Use the Web Planner subtab to associate a Web Ad or Offer to a placement.

Prerequisite: A Web Ad or Web Offer activity should exist

Notes

- Select an application (such as iStore) and then add or select a placement.

- To add a content item for a replacement, first select the content type. You can then

select a content from the Oracle Content Management repository that is either in progress or approved. You can also create content items and submit for approval. When approved, you can associate the content to the activity.

- You can create a new content item which is then immediately associated to the placement and you can preview it. Content items must be approved before the web activity can be activated.

- At least one placement and content item must be associated with a web activity before it can be activated.

- **Click Through Details:** Click this icon to enter click through destination (CTD) details.

- In the Click-Through Details page, if you have not associated a product to the Web Ad in the Offering subtab, the actions related to products, such as Go To Shopping Cart or Go To Item Details, will not be available.

Creating and Associating a Target Group

Associating a specific target group for a Web Ad or Web Offer is optional. To associate a specific audience, use the Target Group subtab of the Activity Details page. If you do not define a target group, the activity is meant for all the visitors to the Web site.

Target groups are generated in the Full Refresh mode - that is using the selection criteria, deduplication rules, and suppression options, the list is recreated as if for the first time.

See Creating and Associating Target Groups, page 11-20 for procedures to create target groups for a campaign activity.

Associating Costs, Revenues, and Metrics for Tracking

The Views available to you for associating tracking metrics to a campaign activity include Costs, Revenues, or Metrics. For each of these, you have the Details or the Hierarchy view.

See Associating Costs, Revenues, and Metrics for Tracking, page 11-35 for the procedure to view or associate costs, revenues, or metrics to a campaign activity.

Understanding Web Reports

All the Web activities come with reports, which include web statistics broken down by placement and by the relevant attribute given the Web activity type (for example, Web ad reports have statistics by product and product category). However, while the rows may be different, the columns are similar.

The following table specifies the columns and their meaning in the channel-specific portion of web reports.

Channel Web Reports

Column	Description
# Impressions Served - Total	Number of times the content item associated to a Placement in the acitivity was served up. Since there is only one content item per Placement, this is the same as the number of times the activity executed.
# Impressions Served - Anonymous	Number of times the content item associated to a Placement in the activity was served up to an anonymous visitor.
# Impressions Served - Identified	Number of times the content item associated to a Placement in the activity was served up to an identifiable visitor.
# Click-Thrus - Total	Number of times the content served is actually clicked.
# Click-Thrus - Anonymous (1)	Number of times the content served is actually clicked by an anonymous visitor.
# Click-Thrus - Identified	Number of times the content served is actually clicked by an identifiable visitor.
# Click-Thrus - Unique (2)	Number of Click-Thrus identified and deduped. For example, a logged in user who clicks the same link twice in the same browser session will have only one click counted.
# of Responses - Identified (3)	Number of Click-Thrus Identified and deduped by Customer ID. For example, a logged in user who clicks on the same link twice in two different sessions will have only one click counted.
Click-Thru Ratio - Anonymous	Number of Impressions Served Anonymous versus the Number of Click-Thrus Anonymous.

Column	Description
Click-Thru Ratio - Identified	Number of Impressions Served Identified versus Number of Click-Thrus Identified.

Table Counts in the Report, page 13-11 gives the count of recommendations served.

Counts in the Report

Metric	Totals	Product A	Product B
# Impressions Served - Total	6	6	6
# Impressions Served - Anonymous	3	3	3
# Impressions Served - Identified	3	3	3
# Click-Thrus - Total	5	4	1
# Click-Thrus - Anonymous (1)	2	2	0
# Click-Thrus - Identified	3	2	1
# Click-Thrus - Unique (2)	2	1	1
# of Responses - Identified (3)	1	1	1
Click-Thru Ratio - Anonymous	2/3	2/3	0/3
Click-Thru Ratio - Identified	3/3	2/3	1/3

There is also the Click-Thru Destination Analysis table that is part of Web Ad and Web Offer reports. This table includes destination and click-through details, such as number of clicks and number of unique clicks - and access to scripting reports as well. Note that

these scripting reports are at the click-through destination level.

14

Creating E-mail Activities

Overview of E-mail Activities

Use this procedure to create an E-mail campaign activity.

Steps:

1. Define the e-mail products and offers, page 11-11.

2. Define the e-mail cover letters, page 14-2.

3. Define click-through destinations, page 14-2.

4. Define target groups, page 11-20.

5. Define control groups, page 11-24.

6. Define costs, revenues, and metrics, page 11-35.

7. Define budgets.

8. Execute the e-mail activity.

9. Track e-mail activities.

Related Topics

Understanding Fatigue, page 11-15

Sending Monthly Newsletters to a Set of Customers, page 3-1

Defining E-mail Cover Letters

Use the Collateral subtab to create and associate cover letters to e-mail campaign activities. Sales people can review the cover letter while working with a responding lead.

Notes

- Cover letters for the different direct marketing channels (e-mail, fax, and print) and other outbound collateral are stored and managed in Oracle Content Manager (OCM). To maintain security for content, you need to have access to the OCM folders to be able to create content items.

- You can select an in-progress or approved cover letter from the OCM repository. You can also update a letter, create a new one, or update an approved letter to create a new version. Cover letters are immediately associated to your activity and can be previewed. Cover letters must be approved before the activity can be approved or activated.

- The details to be entered in the Activity Details page may differ based on the cover letter content type. The content types available depends on the channel of execution.

- If the content type has any query associated with it, you can embed the query tags into the e-mail subject line or e-mail body. The query tags enable the template to dynamically fetch data to create a customized e-mail for each recipient. Refer to the *Oracle Marketing Implementation Guide* for more information on fulfillment queries.

- **Click-through Destinations:** To insert a Click-through Destination (CTD), enter link text at the appropriate location, select it, and click the CTD icon in the toolbar. Enter click through destination details in the Click-Through Details page.

- Optionally, you can add an attachment from the Oracle Content Manager (OCM) repository or from your desktop.

- **Send Test:** Enter an address and send a test mail or fax.

Notes for Creating Cover Letters

- The actual Header, Content Block, Body, Footer, and Attachments available for a cover letter depend on the attributes and their properties defined for the content type on which this cover letter is based.

- **Reply-To:** This field in the Email Details region will be used to track responses. Response information is stored in Interaction History and reported in the operational report for the activity.

- **General Region:** You can edit or enter content for the cover letter here.

- **Edit Text Version:** Click to display the e-mail content in text format if the e-mail is for non-html client systems. The content created for Fax groups will display the content in HTML format.

- You can use merge fields to create personalized e-mail or fax messages. These are executed via fulfillment queries that collect data from the database. This data is merged with a template to create customized e-mail for customers. Refer to the *Oracle Marketing Implementation Guide* for more information about fulfillment queries.

- **Click Thru Destination URL icon:** Converts the selected text to a link and opens the Define Click Through Destination page.

- **Define Click Through Destination page:** Select the Action and its associated parameters. For example, if you choose the action Go to URL, then enter a URL.

End Users Changing Contact Preferences

End users prefer to receive marketing communication via some channels and opt out from others. Administrators control most of these settings. But if you receive an e-mail communication that contains an unsubscribe link, click it to navigate to the Contact Preference page and select the channels via which you do not wish to receive Marketing communications. Channels supported include E-mail, Phone, Fax, Direct Mail, and All. This information is stored in the database and used during campaign activity execution.

End users can also update their primary contact e-mail address and phone number.

An administrator sets up the page to provide this functionality, and can modify the seeded text and seeded options to not include the end users' primary contact points and channel preferences. See the *Oracle Marketing Implementation Guide* for more information.

15

Creating Fax Activities

This chapter covers the following topics:

- Overview of Fax Activities
- Defining Fax Cover Letters

Overview of Fax Activities

Use this procedure to create a fax campaign activity.

Steps:

1. Define fax products and offers, page 11-11.

2. Define fax cover letters, page 15-2.

3. Build tracking URLs, page 12-4.

4. Define target groups, page 11-20.

5. Define control groups, page 11-24.

6. Define costs, revenues, and metrics, page 11-35.

7. Define budgets.

8. Execute fax activities.

9. Track fax activities.

Related Topics

Understanding Fatigue, page 11-15

Defining Fax Cover Letters

Use the Collateral subtab to create and associate cover letters to e-mail campaign activities. Sales people can review the cover letter while working with a responding lead.

Notes

- Cover letters for the different direct marketing channels (e-mail, fax, and print) and other outbound collateral are stored and managed in Oracle Content Manager (OCM). To maintain security for content, you need to have access to the OCM folders to be able to create content items.

- You can select an in-progress or approved cover letter from the OCM repository. You can also update a letter, create a new one, or update an approved letter to create a new version. Cover letters are immediately associated to your activity and can be previewed. Cover letters must be approved before the activity can be approved or activated.

- The details to be entered in the Activity Details page may differ based on the cover letter content type. The content types available depends on the channel of execution.

- Optionally, you can add an attachment from the Oracle Content Manager (OCM) repository or from your desktop.

- **Send Test:** Enter an address and send a test fax.

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Creating Print Activities

This chapter covers the following topics:

- Overview of Print Activities
- Defining Print Cover Letters

Overview of Print Activities

Steps:

1. Define print products and offers, page 11-11.

2. Define print cover letters, page 16-2.

3. Build tracking URLs, page 12-4.

4. Generate mailing labels.

5. Define target groups, page 11-20.

6. Define control groups, page 11-24.

7. Define costs, revenues, and metrics, page 11-35.

8. Define budgets.

9. Execute print activities.

10. Export print activities.

11. Track print activities.

Related Topics

Understanding Fatigue, page 11-15

Defining Print Cover Letters

Use the Collateral subtab to create and associate cover letters to print campaign activities. Sales people can review the cover letter while working with a responding lead.

Notes

- The details to be entered in the Activity Details page may differ based on the cover letter content type. The content types available depends on the campaign activity's channel.

- You can select an in-progress or approved cover letter from the OCM repository. You can also update a letter, create a new one, or update an approved letter to create a new version. Cover letters are immediately associated to your activity and can be previewed. Cover letters must be approved before the activity can be approved or activated.

- Because of security considerations for the content stored in the OCM repository, you must have the necessary folder permissions to access the content. For more details on folders and their security, refer to the *Oracle Content Manager Implementation and Administration Guide*.

- Optionally, you can define a Landing Page URL for response tracking.

- For Direct Marketing Print campaign activities, cover letters can be either in Portable Document Format (PDF) or Rich Text Format (RTF) formats.

- **Print To:** You can select a printer and print a test copy of the cover letter before deploying it. For details on how to set up printers, refer to the *Oracle Marketing Implementation Guide*.

- To download recipient information for the target group members, click **Generate**. The generation of the .csv file containing the recipient information for the members of the target group takes place in the background. After the download is complete, a link appears, which you can use to download the .csv file. This file can be used with other external programs to create labels.

17

Creating Sales Activities

This chapter covers the following topics:

- Sales Activities Overview

Sales Activities Overview

When a sales activity is activated, leads are generated. Do the following to create sales activities.

Steps:

1. Define products and offers, page 11-11.

2. Define sales content, scripts, and proposals.

3. Define target groups, page 11-20. Use the Lead Generation template.

4. Define control groups, page 11-24.

5. Execute sales activities.

6. Track sales activities.

18

Creating Telemarketing Activities

This chapter covers the following topics:

- Overview of Telemarketing Activities
- Understanding Advanced Outbound

Overview of Telemarketing Activities

Steps:

1. Define telemarketing products and offers, page 11-11.

2. Define deliverables, page 23-13.

3. Define target groups, page 11-20.

4. Define control groups, page 11-24.

5. Execute telemarketing activities.

6. Assign agents to telemarketing activities. See the *Oracle TeleSales User Guide* and *Oracle TeleSales Implementation Guide*.

7. Track telemarketing activities.

Related Topics

Understanding Fatigue, page 11-15

Understanding Advanced Outbound

When Oracle Marketing integrates with Oracle Advanced Outbound, it serves to maximize both outbound list penetration and agent productivity. Campaigns and lists

are created in Oracle Marketing, and Oracle Advanced Outbound is used as the execution arm for these lists when telesales agents contact customers on the list via the telephone.

19

Creating Event Activities

This chapter covers the following topics:

- Marketing Event Activities

Marketing Event Activities

Use the Campaign Dashboard to review your event activities and to create new event activities.

Steps:

1. Set up the event, page 23-9.

2. Create the agenda, page 23-12.

3. Assign resources, page 23-12.

4. Set up registration for the event, page 23-11.

5. Set up communications, see Defining Fulfillment Rules, page 23-17.

6. Define the offering, page 11-11.

7. Define target groups, page 11-20.

8. Set up collaboration content, page 11-11.

9. Set up tracking metrics, page 23-6.

10. Enter any additional information using the Additional Information tab.

Related Topics

Events Overview, page 23-1

20

Creating Repeating and Followup Activities

This chapter covers the following topics:

- Understanding Repeating Activities

Understanding Repeating Activities

At times, for specific reasons, marketers need to plan campaign activities whose execution will repeat over a period of time. The following examples demonstrate the need for repeating activities:

- A repeating Up Sell activity may need to run every quarter over the next two years to target new customers who buy or upgrade to Oracle 10G.

- A company may need to send its newsletter to its customers on the 1st of every month until subscriptions last.

- A company may need to send e-mail reminders for the renewal of subscription to newsletters for all the customers whose subscription is ending two months from today.

Activities may repeat endlessly, such as in the send newsletter example, or may end after a specified time period, as in the Up Sell 10G example above. Activities may target the same target group or target new segment members only. You need to define the time range, the target audience, and the repeating frequency when you set up repeating campaign activities. For a sample business user flow, see Sending Monthly Newsletters to a Set of Customers, page 3-1.

The activity owner can receive a workflow notification each time a repeating activity is launched by selecting Notify on Activation in the Additional Information tab in Activity Details.

The Repeating Activity Analysis Report, available from the Reports Dashboard, provides details of target groups and fatigue rules applications for each iteration of the activity. You can drill down to view channel-based information. See Activity

Operational Reports, page 11-36.

21

Using Monitors

This chapter covers the following topics:

- Monitors Overview
- Creating Monitors

Monitors Overview

Marketing users need to monitor the performance of the marketing initiatives they are responsible for with respect to predefined performance measures (metrics). The marketing user can create and set active monitors to fire, based on predefined conditions set to compare initiative performance measures. When the conditions are met, the monitors notify the appropriate audience for follow up or perform predefined actions such as firing an activity.

Checking the status of each initiative with respect to these acceptable parameters, or comparing the performance metrics across initiatives based on business needs, can be time consuming, error prone, and cumbersome, if done manually. Monitors provide an automated way of creating and setting active monitors to do the same.

Triggering Actions

Improve marketing communications by automatically executing campaign activities when specific customer or business situations arise. Monitors trigger a campaign activity when a specified threshold or criteria is reached. For example, a monitor may test the responses to a statewide campaign. If the level of responses reaches a specified level, then a regional campaign is activated. Likewise, monitors can be used to create campaign waves. An initial campaign may offer a particular product. A second wave campaign, triggered to execute a month after the initial campaign, may offer accessories only to customers who purchased the product during the initial campaign.

You can use monitors to execute multi-channel campaign activities, too. For example, after the number of responses to a campaign reach a specified threshold, an e-mail blast and a telemarketing activity may be triggered.

The following figure depicts a typical monitor function flow. You create a campaign and its associated campaign activities. You also create a monitor, and associate the monitor to the campaign activity. When the monitor condition is met, the action associated with it executes.

Trigger Functional Flow
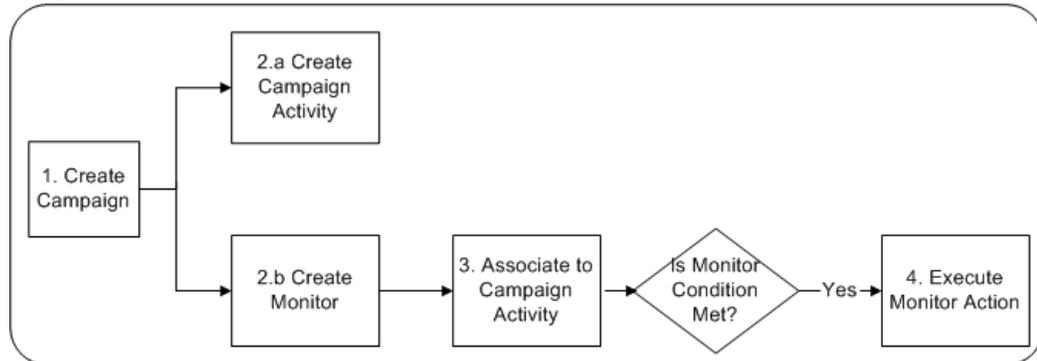
The business examples for using the monitor functionality include:

- Monitor response information continuously and automatically execute specified action when responses reach a specific threshold. For example, if the number of responses for a Oracle 9i campaign reaches 100,000, initiate a telemarketing activity.

- Automatically execute the same activity again over the defined time line, as and when the monitor condition is satisfied. For example, check weekly if new people have signed up for online banking, if they have, send a welcome letter to them.

- Alert the campaign coordinator if the campaign actual spending exceeds the forecast cost.

Related Topics

Creating Monitors, page 21-2

Creating Monitors

You can create monitors for any of the following types of initiatives:

- Program

- Campaign

- Campaign Activity

- Event

- Event Schedule

- One Off Event

The following diagram shows the monitor creation process.
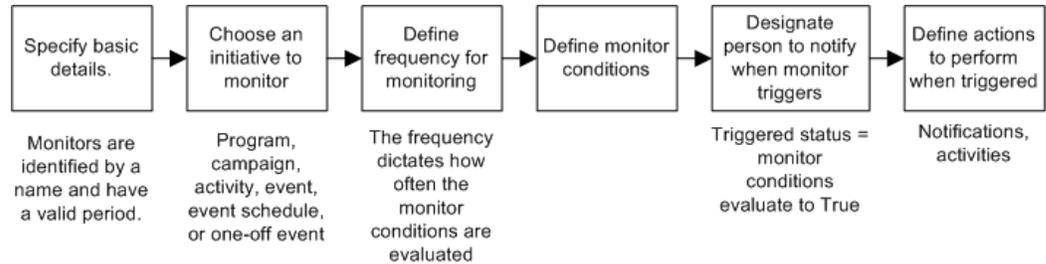
Monitors are identified by a name and have a valid time period. Choose the initiative to monitor and define how frequently the conditions are evaluated. Define the monitor conditions and designate who is notified when the conditions are met. The monitor can also be set to trigger campaign activities.

Notes on Creating Monitors

- **Initiative Name**: You can select an initiative to which you have ownership or team access and access to the tracking data and metrics. The initiative cannot be canceled or archived.

- **Monitor Status**: The monitor remains in a dormant status until the conditions of the monitor are met, when it changes to triggered.

- **Monitor From**: For an active initiative, the From date defaults to the activation date of the initiative. For a non-activated initiative, the From date defaults to the initiative start date. You can change the date until the monitor starts evaluation and is therefore activated.

  If the start date is before the current date, then the monitor starts working as soon as it is created.

  Example
  For example, to check if the number of registrants reaches the minimum registration requirement for an event two weeks before the event start date, specify the start date of the monitor to be two weeks before the event start date.

- **Monitor To**: The To date defaults to the end date for the initiative, or if none, the end date of its parent. If there is no end date, then there is no default. You can change the date at any time.

- **Monitoring Frequency**: You can make changes to the frequency at any time. The new frequency is used for the next monitor evaluation.

- **Follow On Actions - Notification**: You can send a notification to one person when

the monitor conditions are met. You can change the person at any time.

- **Activate Button**: You can click the Activate button at any time to activate the monitor, after which no changes can be made to the monitor. When a monitor is Activated it begins evaluating and processing at the set frequency. At the time of Activation, if the Monitor From Date-time is in the past, the Monitor From Date-time is changed to the current Date-time per the Client timezone specified on the Monitor Definition page, and the Monitor starts evaluating right away. If the Monitor From Date-time is in the future, then the monitor starts at the Monitor From Date-time.

- **Delete**: You can delete an existing monitor if it has not been activated.

Possible Setups for Monitoring Conditions

- The following value types can be used for metrics in monitor conditions:

  - **Forecast**: The total forecast for the initiative plus a rollup from all the child components

    Example
    For example, compare actual and forecast and notify if the campaign has not fetched as many responses as forecasted three months after activation.

  - **Actual**: The total actual for the initiative plus a rollup from all the child components

    Example
    For example, notify if the number of leads has not reached 5000 three months after the activation.

  - **Variance**: The total actual minus the total forecast

  - **Variance Percent**: The total actual minus the total forecast divided by the total forecast

    Example
    For example, notify if the cost variance becomes more than negative 5 percent of the forecasted cost (the campaign spent more than forecast).

- **Performance to a Target Value**: Compares a marketing object's metric value to another value. Enter a positive or negative value for the target value. Currency values should be entered using the functional currency displayed at the top of the screen.

  Example
  For example, campaign responses (metric) can be compared to 20,000 (value). If the operator (=) is selected, once the campaign responses = 20,000 a trigger initiates an action (for example, to execute a follow up telemarketing campaign activity).

- **Performance Between Two Initiatives**: Compares a metric for one initiative with

another metric associated with another or the same initiative. You can select initiatives that are not canceled, and for which you have ownership or team access and have access to financial data.

Example

Check if forecast leads is less than actual leads 6 months after the campaign activation. (Note that the Monitor From date will need to be 6 months after the campaign start date for this scenario to work.)

Check if forecast cost is less than actual cost when the campaign is activated.

Check if actual leads of the monitored campaign is less than the actual leads of a similar campaign run last year. (Select this similar campaign from last year.)

- **Performance to a Custom Query**: Compares a Marketing object's metric value to a single value returned by a Discoverer Workbook.

  Example

  For example, if the responses (metric) for a campaign activity is greater than the value returned by a Discoverer Workbook, then activate the associated campaign activity. In this case, the Discoverer Workbook should return a single value. For example, the Workbook may have a SQL condition like 'select count (customer_identifier) from ams_person_details_v'. This returns the count of customer records in 'ams_person_details_v' as a single value.

Setting Up Follow On Actions - Activities

- Select one or more activities to start when the conditions are met. You can select activities for which you are the owner or are on the team.

- You can only select activities that are no repeating and are not yet activated.

- You can only select activities that are not triggered by a monitor.

- You can delete activities with a New status.

- **Repeat**: If you want the triggered to activity to be carried out just once, then deselect the Repeat checkbox. You can stop the repeat at any time, even for approved activities. You can select Repeat for activities with New status. You can select Repeat for activities not with New status only prior to the Monitor From date, at which time it starts evaluating.

- **Target New Segment Members Only**: For repeat activities, if you want to contact all segment members for each repetition of the activity when the monitor triggers, then deselect this checkbox.

- **Activate After Approval By**: You can select a resource who must approve each repeat instance of a triggered activity before it is activated. When you change the approver, the new approver applies to the next repetition of the activity.

Contents of Monitor History

- The monitor is tracked upon each execution regardless of the outcome.

- **Monitor Status**: The monitor is triggered or dormant after the evaluation.

- **Metrics Value**: The value at the time of the evaluation, the specified operator, and the target value that was specified or from the second metric being compared. For example: 190 Is Less Than (<) 200

22

Using Web ADI to Manage Campaign Activities

This chapter covers the following topics:

- Web ADI Overview
- Web ADI Layouts
- Prerequisites for Using Web ADI
- General Guidelines for Using Web ADI Layouts
- Web ADI Processes

Web ADI Overview

Web Application Desktop Integrator or Web ADI is a tool that brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. Oracle Marketing uses Web ADI support to setup campaign activities from the Campaign Workbench.

When the marketing department of an organization needs to work with a large number of campaign activities that are part of a bigger marketing plan, marketers can use the spreadsheet interface provided by Web ADI. The worksheet provides a quick and simple means to create and update multiple campaign activities within and across campaigns. The campaign activity data can be exported into seeded Web ADI layouts, and can be accessed easily externally, for analysis.

The following are some typical scenarios where Web ADI can be used to create campaign activities:

Scenario 1

The marketing manager of an organization plans to advertise its new "Consulting Solutions Software Application" in 25 magazines that target senior level executives. The placement and the price of each advertisement may vary, and the forecast values for

expected results may be different for each marketing medium chosen. Each advertisement will be a campaign activity in Oracle Marketing and may be planned and executed by different marketers.

The marketing manager can use a spreadsheet to create a media plan, and to enter and manage the target audience information, the expected costs, the forecast values for expected results, and so on. When the media plan is finalized and approved, all the 25 campaign activities must be created in the Oracle Marketing application. While the individual campaign activities will be managed by different marketers, the marketing manager will review and analyze the metrics at the parent campaign level.

Scenario 2

The marketing managers of an organization place their advertisement requests for different newspapers to Joe, the media planner. The advertisements are campaign activities belonging to different campaigns. Joe uses a spreadsheet to keep track of the available placements for the different newspapers and the associated costs and other measurements. The advertisements are then imported as campaign activities into the Oracle Marketing application and managed by different marketing managers.

Scenario 3

The marketing department of an organization plans to conduct an event and wishes to elicit online event registrations. 50 advertisements must be deployed via billboards, radio, television, and various third party Web sites (such as Yahoo or CNN). Each advertisement will be a campaign activity in Oracle Marketing and must be created along with the associated Click Through Tracking URLs that lead the customers to the online event registration process.

The marketing manager can use a spreadsheet to enter all the details of the 50 campaign activities, including the associated Click Through Tracking URL definition details. The details can then be imported into the Campaign Workbench of Oracle Marketing.

Web ADI Layouts

Web ADI processes use predefined column layouts for the spreadsheet interface and predefined logic to load the spreadsheet data into an application's data store. A Web ADI layout is a combination of a spreadsheet interface consisting of a set of logically grouped columns, the mapping of attributes from each of these columns to the appropriate column in the underlying data store, and the logic to create or update the data with the necessary validations. Some of these logical groups of columns are:

- Product and Product Category Columns

- Web Planner and Click Through Destination (CTD) columns

- Landing Page URL and CTD columns

A marketing administrator can customize Web ADI layouts for marketing use. For example, the administrator may create different layouts (and include a different set of columns) for advertisement activities, direct marketing activities, and Web activities. See the *Oracle Marketing Implementation Guide* for more details.

The following figure displays a sample Web ADI spreadsheet.

A Sample Web ADI Spreadsheet
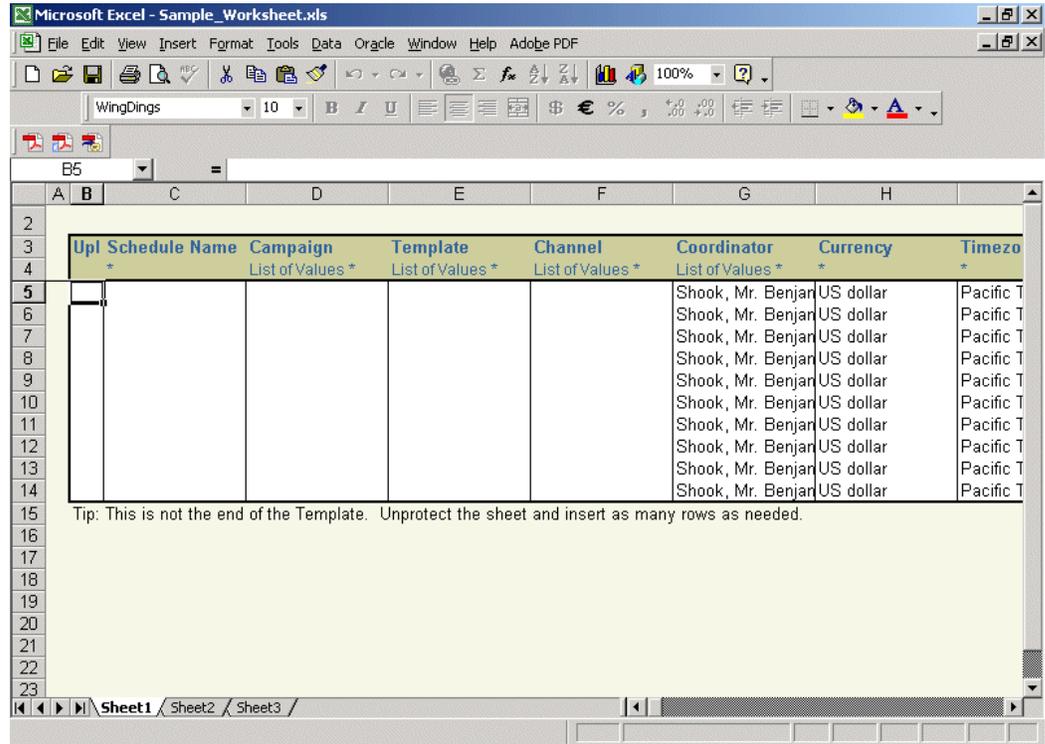
Seeded Web ADI Layouts

The seeded Web ADI Layouts include:

- Activities Import: You can use this layout to create new activities and import them into the Marketing application.

- Update Activities: This layout is for mass update of basic identifying activity attributes. Sample scenarios where this layout may be used:

  - The marketing manager needs to adjust the dates of the campaign activities for a specific campaign for which the dates have changed

  - The marketing administrator needs to mass update the ownership of campaign activities when the current owner leaves the marketing department

- The marketing administrator needs to change the parent campaign for a set of campaign activities

- The marketing manager needs to cancel a set of campaign activities

- Media Planner: You can use this layout to create or update basic campaign activity data and activity metrics data.

Prerequisites for Using Web ADI

The following are the prerequisites for Web ADI:

- Client PC with Windows ME, Windows NT 4.0 (with Service Pack 3 or later), Windows 2000, Windows XP, or Windows 98 installed on it

- Internet Explorer 5.0 or greater installed on the client PC

- Microsoft Excel 97, 2000, 2003, or XP installed on the client PC. For Web ADI to work with Microsoft Excel XP/2003, you must change the macro settings for Excel XP/2003. To do so:

  1. In Excel, go to Tools > Macro > Security > Trusted Sources.

  2. Select the "Trust access to Visual Basic Project" option.

- To allow spreadsheets to be created on your desktop, change your intranet browser security settings as follows:

  1. Navigate to Tools > Internet Options > Security > Custom Level.

  2. Set the "Initialize and script ActiveX controls not marked as safe" option to "Prompt".

- Refer Web ADI documentation for more information.

General Guidelines for Using Web ADI Layouts

Use the following guidelines when using Web ADI layouts:

- When using the Web ADI functionality, the spreadsheet includes a menu named "Oracle" with the following options:

  - **List of Values:** Use this option to open the LOV window for the current field in the spreadsheet.

  - **Upload:** Use this option to begin the Import or Update process. After you select

the upload parameter, the relevant concurrent request will run in the background and must run completely for the Import or Update process to be complete. Refer to the *Oracle Marketing Implementation Guide* for information on concurrent requests for Web ADI processes.

- **Monitor:** Use this option to monitor the status of the Import or Update process you have initiated.

- **Download:** This is a useful option if you want to download data from the application to the spreadsheet from within the Web ADI interface.

- **About:** Use this option to get Oracle Web ADI product information.

- You can invoke LOVs by either double-clicking on the corresponding cell or by choosing "List Of Values" from the Oracle menu. You must be working in the connected mode (not the offline mode) for LOVs to contain relevant data.

- Use MS Excel's Column Hide feature to hide the "System Value" columns in a worksheet.

Web ADI Processes

You can use Web ADI processes to accomplish the following tasks:

- Use the Web ADI Import process to create new campaign activities

- Use the Web ADI Update process to modify basic campaign activity details

- Use the Web ADI Update process to modify activity metric details

  In the update process, the Web ADI Export process is used to load the data from the selected campaign activities to the Web ADI layout.

The Web ADI Import Process

You can use the Web ADI Import process to create new campaign activities in the following two distinct ways:

- You start with an empty Web ADI layout. As you specify the values for columns in a serial order, dependent columns will be populated with the default values and the dependent columns based on List of Values (LOVs) will be presented for data entry. After completing entering the data in the spreadsheet, you can choose to complete the activity creation process or save the spreadsheet on your desktop for later use.

- You open a spreadsheet saved earlier and make necessary changes to the data. You can then use the Oracle > Upload menu option to log in and complete the activity

creation process, or save the spreadsheet on the desktop for later use.

Web ADI Import Process Flow

The following figure depicts the process flow for the two ways in which campaign activities can be created using the Web ADI Import process.

Web ADI Import Process
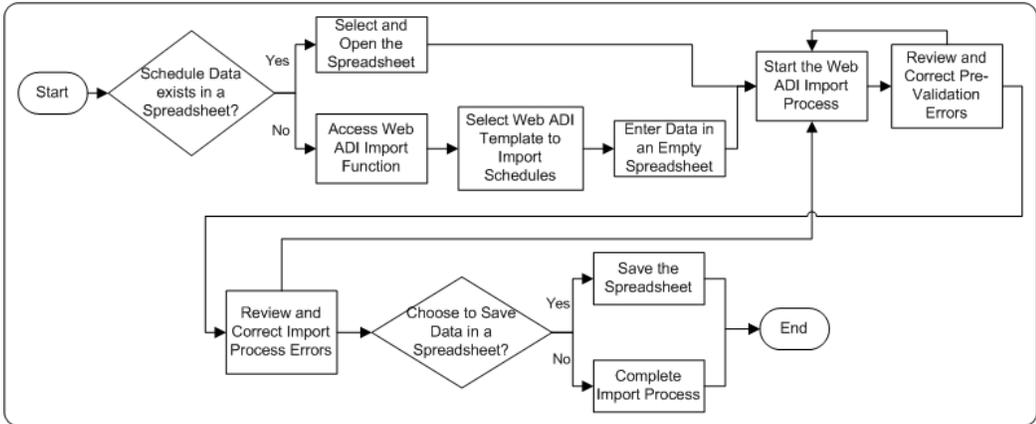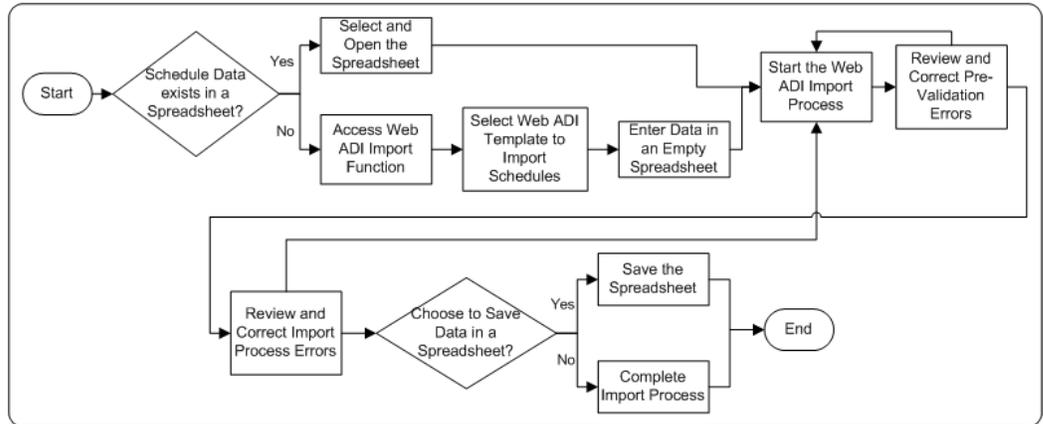
Creating Campaign Activities Using the Import Process

To use Web ADI to import activities data, navigate to the Activities List page from the Campaign Dashboard. You can also work with a saved spreadsheet in the offline mode. If you start the import process in the offline mode, you will need to sign into Oracle Applications and select a responsibility.

Navigation: Campaign Workbench > Activities > Import activities

Notes

- The default number of rows in a worksheet is 10. You may add more rows. However, note that the default values will not be populated for the additional rows. You must specifically enter or select values for such fields.

- You can use spreadsheet functionality to add more columns as needed. These columns are ignored by the Web ADI Process during data upload.

- Unprotect a worksheet before adding rows or columns in it. Use the spreadsheet menu option Tools > Protection > Unprotect Sheet to do so.

- If you leave mandatory columns blank, the Import process will result in an error.

- Select the Oracle > Upload menu option to start the Import process. The Import process may take some time. Do not close the browser window before the process is

complete. Do not close the browser window before the process is complete. If you do so, you may need to perform the Import process again. Use the Oracle > Monitor menu option to verify the status of the process.

- Use the Flagged Rows upload parameter if some of the rows on the worksheet are empty.

- If the Import process completes with errors for some rows, even the rows that were successfully uploaded are flagged. Manually clear the flag for the successful rows before uploading the flagged rows again.

The following table provides guidelines for using the seeded Activity Import layout.

Fields in the Seeded Import Activities Layout

Field Name	Mandatory?	Guidelines
Activity Name	Yes	-
Campaign	Yes	Campaigns to which you have access will be displayed in the LOV
Template	Yes	Only Active templates are available for selection
Channel	Yes	-
Coordinator	Yes	Defaults to the logged in user
Currency	Yes	• The default currency specified for a activity applies to all the metrics that track amounts • Default metric values are displayed in this currency
Timezone	Yes	-

Field Name	Mandatory?	Guidelines
Launch On	Yes	• As the Web ADI framework does not support date pickers, use MS Excel Date formats to enter dates • Do not use a format that includes time • This date must be within the parent Campaign's start and end dates
Launch Time	No	Input time here using the format HH24:MI:SS
End On	No	• As the Web ADI framework does not support date pickers, use MS Excel Date formats to enter dates • Do not use a format that includes time • If no value is entered, this field defaults to the parent campaign's end date
End Time	No	• Input time here using the format HH24:MI:SS • If no value is entered, this field defaults to the parent campaign's end time
Source Code	No	If you do not enter a Source Code, a system generated Source Code will be assigned to the campaign activity
Country	No	Defaults to the value defined as the user's country
Marketing Medium	No	For some activities, such as Advertising activities, this is a mandatory field, and must be selected
Purpose	No	As dependent columns are not supported, ensure that you select a Purpose relevant to the Template you have selected

Field Name	Mandatory?	Guidelines
Objective	No	-
Repeat Frequency	No	If the Repeat Frequency UOM field contains a value, you must enter a value for this field
Repeat Frequency UOM	No	If the Repeat Frequency UOM field contains a value, you must enter a value for the Repeat Frequency field
Repeat For	No	• If Repeat Frequency and Repeat Frequency UOM contain values, you must select a value for this field • Select a value to indicate for which Target Group entries the activity must repeat
Activity Flexfield Category	No	-
Activity Flexfields	No	-
Channel Based Flexfields	No	Use the Context Value LOV to select an Activity Id (it provides the context) when you need to work with context-sensitive flexfields
Primary Product Category	No	Product Categories associated with the parent Campaign only are available for selection
Primary Product	No	Products associated with the parent Campaign only are available for selection
Cover Letter	No	• Cover Letters may be associated only to direct marketing activities (Email, fax, Direct Mail - Print) • Access to content is based on Oracle Content Manager's security privileges assigned to you

Field Name	Mandatory?	Guidelines
Web Planner - Application	No	To be specified for Web activities
Web Planner - Placement	No	To be specified for Web activities
Web Planner - Title	No	To be specified for Web activities
Web Planner - Content Item	No	• To be specified for Web activities • Only Content Items belonging to Content types that are allowed for the specified Placement will be available for selection
Landing Page URL	No	Applicable for the following types of activities: • Advertising • Press and Analyst • Direct Marketing - Fax • Direct Marketing - Print
Additional Parameter	No	This is an optional field, and may be specified if Landing Page URL is specified
CTD - Action	No	• If the Landing Page URL is specified, CTD - Action must be specified along with the parameters required • For Web Offer activities, because the Offers functionality is not available from Web ADI, the "Go To Shopping Cart with an Item" CTD Action is not available See CTD Actions and their Parameters, page 22-14 table for information on CTD parameters.

Field Name	Mandatory?	Guidelines
CTD - URL	No	-
CTD - Parameter 1	No	• The layout contains columns for CTD - Parameter 1 to CTD - Parameter 5 • The page title and table headers for all the CTD parameter LOVs will remain static
CTD - Additional Parameter 1	No	The layout contains columns for CTD - Additional Parameter 1 to CTD - Additional Parameter 5
Collaboration Content Item 1	No	• The layout contains columns for Collaboration Content Item 1 to Collaboration Content Item 3 • Access to content is based on Oracle Content Manager's security privileges assigned to you
Script	No	One script may be associated to an activity
Notes	No	Type in the note text in this field
Intent for Submit For Approval	No	• Use this field to submit activities for approval directly from the spreadsheet. Ensure all the mandatory data for the activities are included • The default value is Do Not Submit For Approval • Because the Target Group functionality is not enabled in Web ADI and specifying a target group is mandatory for direct marketing activities (Email, fax, Direct Mail - Print), you cannot submit them for approval

Field Name	Mandatory?	Guidelines
Fields Campaign Id to Collaboration Content Item Id	No	These fields contain system values and you may hide them using Ms Excel's Column Hide feature.
Metric 1 - Manual Fixed	No	• You must be the owner of the parent campaign or be a member of the team with financial privileges to be able to edit the metrics associated with a campaign activity. • The layout contains columns for Metric 1 - Manual Fixed to Metric 10 - Manual Fixed
Metric 1 - Manual Fixed Forecast	No	The layout contains columns for Metric 1 - Manual Fixed Forecast to Metric 10 - Manual Fixed Forecast
Metric 1 - Manual Variable	No	The layout contains columns for Metric 1 - Manual Variable to Metric 5 - Manual Variable
Metric 1 - Manual Variable Forecast Unit	No	The layout contains columns for Metric 1 - Manual Variable Forecast Unit to Metric 5 - Manual Variable Forecast Unit
Metric 1 - Function Fixed	No	• A function metric must be associated only once with a campaign activity. If you choose the same metric multiple times for association, the upload process will import the very first occurrence of that metric and the subsequent occurrences will be ignored • The layout contains columns for Metric 1 - Function Fixed to Metric 10 - Function Fixed
Metric 1 - Function Fixed Forecast	No	The layout contains columns for Metric 1 - Function Fixed Forecast to Metric 10 - Function Fixed Forecast

Field Name	Mandatory?	Guidelines
Metric 1 - Function Variable	No	The layout contains columns for Metric 1 - Function Variable to Metric 5 - Function Variable
Metric 1 - Function Variable Forecast Unit	No	The layout contains columns for Metric 1 - Function Variable Forecast Unit to Metric 5 - Function Variable Forecast Unit
Metric 1 - Formula	No	The layout contains columns for Metric 1 - Formula to Metric 5 - Formula
Messages	No	• A read-only column used by the system to display error messages for rows with errors • A green smiley indicates that the Import process for the row completed successfully

The following table lists the various CTD Actions and the parameters that must be associated with each.

CTD Actions and their Parameters

CTD Action	CTD Parameter 1	CTD Parameter 2	CTD Parameter 3
Go To URL	URL	-	-
Go To Shopping Cart	Speciality Store	-	-
Go To Item Details	Product	Speciality Store	Section
Go To Shopping Cart With an Item	Product	Speciality Store	Section
Go To Section	Speciality Store	Section	-
Go To Store Registration Page	-	-	-

CTD Action	CTD Parameter 1	CTD Parameter 2	CTD Parameter 3
Go To Site	Speciality Store	-	-
Go To Web Script	Web Script	Event	-
Go To Content Item	Content Item	Stylesheet	-

Web ADI Update Process

The Web ADI Export process is used to support the Update process. Using the Web ADI Update process, you can:

- Update basic activity details using the Update layout

- Update activity metrics data using the Media Planner layout

You can use the Web ADI Update process in the following two distinct ways:

- Select a list of campaign activities from the Campaign Workbench, start the Web ADI Update process, and export the activity data into the Web ADI layout. After making the necessary changes to the data in the layout, you can choose to either complete the activity update process or save the spreadsheet on the desktop for later use.

- You open a spreadsheet saved earlier and make necessary changes to the data. You can then use the Oracle > Upload menu option to log in and complete the activity Update process, or save the spreadsheet on the desktop for later use.

Web ADI Update Process Flow

The following figure depicts the process flow for the two ways in which campaign activity details can be modified using the Web ADI Update process.
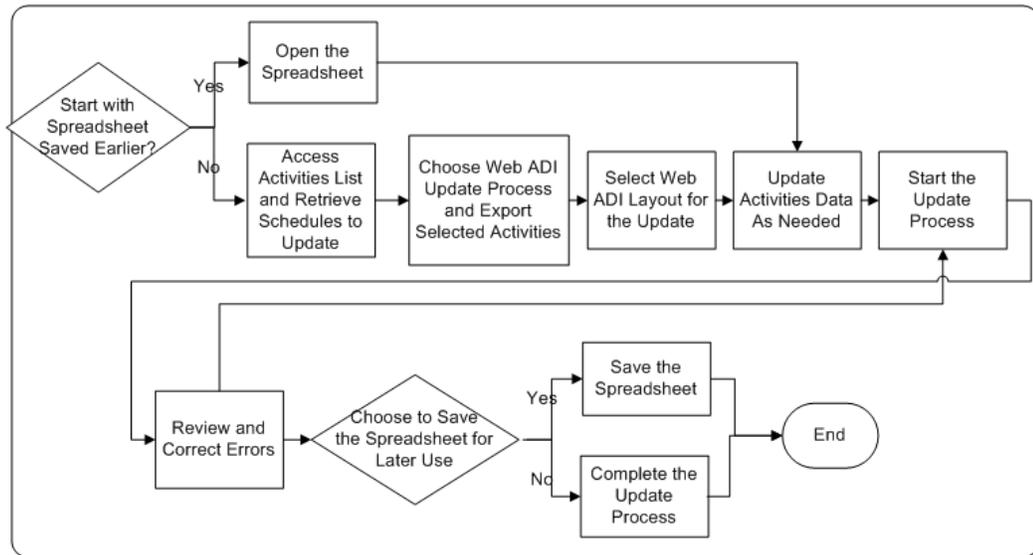
Updating Basic Campaign Activity Details

To update the basic campaign activity details, use the Update layout. You may work offline with a spreadsheet saved on your desktop. When you start the Web ADI Update process using the Oracle > Upload menu option, you will need to log in and select a responsibility.

Navigation: Campaign Workbench > Activities List > Export to Update Activities > Go

Notes

- If you try to upload activities to which you do not have access, a warning will be displayed. To be able to upload selected campaign activities, create a personalized view on the activities List page to include only the campaign activities you need.

- If you try to modify any read-only field, the Update process will result in an error for the row. You will need to export the activity data and perform the Update process again.

- The Update process is iterative. If the update of some rows results in errors, the system flags these rows. You can review the error messages, make the necessary corrections, and perform the Update process again for the flagged rows.

- Exporting campaign activities data to the Web ADI layout, making the necessary changes to the data, and importing the data back into the system may be spread over time. In fact, after updating activities data, you may even save the spreadsheet on the desktop, and import the data back into the system later. In the meantime, if changes are made to the activities data directly in the Campaign Workbench, and then the data in the saved spreadsheet is imported, an error will result for those

activities that were modified in the Campaign Workbench. You will need to download the data (use the Oracle > Download menu option) and perform the Update process again.

- The number of rows downloaded for updates during the Export process will be limited to the value the administrator has set for the VO_MAX_FETCH_SIZE profile value. This value is typically set to 200.

- You can use spreadsheet functionality to add more columns as needed. These columns are ignored by the Web ADI Process during data upload.

- Unprotect a worksheet before adding columns in it. Use the spreadsheet menu option Tools > Protection > Unprotect Sheet to do so.

- Select the Oracle > Upload menu option to start the Update process. The AMS: Export and Update Activity concurrent request runs in the background and must complete for the Update process to be complete. The Update process may take some time. Do not close the browser window before the process is complete. If you do so, you may need to perform the Update process again. Use the Oracle > Monitor menu option to verify the status of the process.

The following table provides guidelines for working with the Update layout.

Field Name	Updateable?	Guidelines
Spreadsheet Reference	No	• Displays a system generated value • The value is passed to the concurrent program during the Update process and is useful when you need to troubleshoot Update process errors
Activity Name	Yes	This is a mandatory field
Campaign	No	If you try to modify any read-only field, the Update process will result in an error for the row. You will need to export the activity data and perform the Update process again
Template	No	-
Channel	No	-
Coordinator	Yes	Only the activity owner or an administrator can modify this value

Field Name	Updateable?	Guidelines
Currency	Yes	This is a mandatory field
Timezone	Yes	-
Launch On	Yes	• As the Web ADI framework does not support date pickers, use MS Excel Date formats to enter dates • Do not use a format that includes time • This date must be within the parent Campaign's start and end dates
Launch Time	Yes	Input time here using the format HH24:MM:SS
End On	Yes	• As the Web ADI framework does not support date pickers, use MS Excel Date formats to enter dates • Do not use a format that includes time
End Time	Yes	Input time here using the format HH24:MI:SS
Source Code	Yes	If you do not enter a Source Code, a system generated Source Code will be assigned to the campaign schedule
Country Name	Yes	If you need to modify this field, select a value that is valid with reference to any Marketing Medium selected (for Advertising activities)
Marketing Medium	Yes	• For some activities, such as Advertising activities, this is a mandatory field • Ensure Channel and Country are selected before attempting to select a Marketing Medium • Choose a Marketing Medium relevant to the Channel and Country selected

Field Name	Updateable?	Guidelines
Description	Yes	This column is mapped to the Objective field in the Activity Details page
Current Status	No	-
Update Status To	Yes	If this field needs to be updated, select a status that is valid with reference to the value in the Current Status field
Activity Flexfields	Yes	-
Channel Based Flexfields	Yes	Use the Context Value LOV to select an Activity Id (it provides the context) when you need to work with context-sensitive flexfields
Product Category	Yes	Only the Product Category marked as *Primary* will be exported for update
Product	Yes	Only the Product marked as *Primary* will be exported for update
Intent To Submit for Approval	Yes	• Use this field to submit activities for approval directly from the spreadsheet. Ensure all the mandatory data for the activities are included • The default value is Do Not Submit For Approval • Because the Target Group functionality is not enabled in Web ADI, you cannot submit direct marketing activities (Email, fax, Direct Mail - Print) for approval
Fields Activity ID to Coordinator ID	No	These fields contain system values and you may use MS Excel's Column Hide feature to hide them
Messages	No	A green smiley indicates that the Update process for the row completed successfully

Updating Campaign Activity Metrics Data

To update activity metric details, use the Media Planner layout.

Navigation: Campaign Workbench > Activities List > Export to Media Planner > Go

Notes

- If you try to upload activities to which you do not have access, a warning will be displayed. To be able to upload selected campaign activities, create a personalized view on the activities List page to include only the campaign activities you need.

- If you try to modify any read-only field, the Update process will result in an error for the row. You will need to export the activity data and perform the Update process again.

- The Update process is iterative. If the update of some rows results in errors, the system flags these rows. You can review the error messages, make the necessary corrections, and perform the Update process again for the flagged rows.

- Exporting campaign activities data to the Web ADI layout, making the necessary changes to the data, and importing the data back into the system may be spread over time. In fact, after updating activities data, you may even save the spreadsheet on the desktop, and import the data back into the system later. In the meantime, if changes are made to the activities data directly in the Campaign Workbench, and then the data in the saved spreadsheet is imported, an error will result for those activities that were modified in the Campaign Workbench. You will need to download the data (use the Oracle > Download menu option) and perform the Update process again.

- The number of rows downloaded for updates during the Export process will be limited to the value the administrator has set for the VO_MAX_FETCH_SIZE profile value. This value is typically set to 200.

- You can use spreadsheet functionality to add more columns as needed. These columns are ignored by the Web ADI Process during data upload.

- Unprotect a worksheet before adding columns in it. Use the spreadsheet menu option Tools > Protection > Unprotect Sheet to do so.

- Select the Oracle > Upload menu option to start the Update process. The AMS: Export and Update Activity concurrent request runs in the background and must complete for the Update process to be complete. The Update process may take some time. Do not close the browser window before the process is complete. If you do so, you will need to perform the Update process again. Use the Oracle > Monitor menu option to verify the status of the process.

- For some activity attributes, the Web ADI layout may not be able to support all the activity associations. For example, a selected activity may have 30 metrics associated with it. However, the Web ADI layout may have been defined to support only 10 metric associations. In such a case, the 10 most recently updated metrics will be exported.

- When using the Media Planner to edit metrics data, metrics refresh will not be executed immediately. You must wait for the next system refresh or explicitly refresh from the application.

- You cannot remove metric associations in the Web ADI layout for activities.

- Rules associated with metrics will be enforced to decide what metrics data can be edited and when. Some examples: forecast costs can be entered only until the campaign activity goes Active, actual costs can be entered only after the campaign activity goes Active, and so on.

The following table provides guidelines for working with the Media Planner layout.

Guidelines for Using the Media Planner Layout

Field Name	Updateable?	Guidelines
Spreadsheet Reference	No	- Displays a system generated value - The value is passed to the concurrent program during the Update process and is useful when you need to troubleshoot Update process errors
Activity Name	Yes	-
Campaign	No	If you try to modify any read-only field, the Update process will result in an error for the row. You will need to export the activity data and perform the Update process again
Channel	No	-
Coordinator	No	-
Currency	No	-
Launch On	No	-
End On	No	-
Country	No	-
Marketing Medium	No	-

Field Name	Updateable?	Guidelines
Purpose	No	-
Status	No	-
Channel Based Flexfields	No	-
Primary Product Category	No	-
Primary Product	No	-
Metric 1 - Manual Fixed	Yes	• You must be the owner of the parent campaign or be a member of the team with financial privileges to be able to edit the metrics associated with a campaign schedule. • You can modify existing metrics or associate new metrics. If the new metric is already associated to the schedule, the metric value will be updated. If not, the metric will first be associated to the activity and then the value will be added. • The layout contains columns for Metric 1 - Manual Fixed to Metric 10 - Manual Fixed.
Metric 1 - Manual Fixed Forecast	Yes	The layout contains columns for Metric 1 - Manual Fixed Forecast to Metric 10 - Manual Fixed Forecast
Metric 1 - Manual Fixed Currency	Yes	The layout contains columns for Metric 1 - Manual Fixed Currency to Metric 10 - Manual Fixed Currency

Field Name	Updateable?	Guidelines
Metric 1 - Manual Variable	Yes	• Variable metrics are supported only for Cost and Revenue Metrics • The layout contains columns for Metric 1 - Manual Variable to Metric 5 - Manual Variable
Metric 1 - Manual Variable Forecast Unit	Yes	The layout contains columns for Metric 1 - Manual Variable Forecast Unit to Metric 5 - Manual Variable Forecast Unit
Metric 1 - Manual Variable Currency	Yes	• Use the Currency set for this metric attribute to enter values in this field • The layout contains columns for Metric 1 - Manual Variable Currency to Metric 5 - Manual Variable Currency
Metric 1 - Manual Variable Actual	Yes	The layout contains columns for Metric 1 - Manual Variable Actual to Metric 5 - Manual Variable Actual
Metric 1 - Function Fixed	Yes	• A function metric must be associated only once with a campaign schedule. If you associate the same metric multiple times, the upload process will import the very first occurrence of that metric and the subsequent occurrences will be ignored. • The layout contains columns for Metric 1 - Function Fixed to Metric 10 - Function Fixed
Metric 1 - Function Fixed Forecast	Yes	The layout contains columns for Metric 1 - Function Fixed Forecast to Metric 10 - Function Fixed Forecast

Field Name	Updateable?	Guidelines
Metric 1 - Function Fixed Currency	Yes	• Use the Currency set for this metric attribute to enter values in this field • The layout contains columns for Metric 1 - Function Fixed Currency to Metric 10 - Function Fixed Currency
Metric 1 - Function Variable	Yes	The layout contains columns for Metric 1 - Function Variable to Metric 5 - Function Variable
Metric 1 - Function Variable Forecast Unit	Yes	The layout contains columns for Metric 1 - Function Forecast Unit to Metric 5 - Function Variable Forecast Unit
Metric 1 - Function Variable Currency	Yes	• Use the Currency set for this metric attribute to enter values in this field • The layout contains columns for Metric 1 - Function Variable Currency to Metric 5 - Function Variable Currency
Fields Activity ID to Coordinator ID	No	These fields contain system values and you may use MS Excel's Column Hide feature to hide them
Messages	No	This field is used by the system to display error messages for rows with errors. A green smiley indicates that the Update process for the row completed successfully

Security Requirements for Web ADI Processes

The following security restrictions are applicable:

• Access to parent campaigns is based on team access security restrictions.

• Access to content items and cover letters are based on Oracle Content Manager (OCM) security guidelines. Refer OCM documentation for more information.

• Logged in users will be able to complete the Update process for only those activities in the system to which they have access. If they try to export activities to which they

do not have access, the Update process will display a warning message and export only those activities to which they have access.

- The Finance Access privileges must be granted to you by the administrator before you can import metrics information during the campaign activity creation process or update metrics during the Update process.

- Marketing administrators with FULL ACCESS privileges can create and update any activity in the system. They can also update the basic meta data for activities on a mass scale. Examples: mass update the ownership of campaign activities when the current owner leaves the marketing department or change the parent campaign for a set of activities.

23

Working with and Executing Events

This chapter covers the following topics:

- Events Overview
- Creating and Managing Events
- Teams
- About Contact Points
- Creating Event Schedules
- Defining Event Schedule Details
- Specifying the Invitation List for an Event Schedule
- Setting Up Event Registrations
- Registering Participants for an Event
- Creating Event Agenda Tracks and Sessions
- Entering Event Coordinators and Other Resources
- Creating a Deliverable
- Specifying Deliverables for the Event
- Defining Fulfillment Rules
- Creating Venues
- Viewing the Roster
- Viewing the Events Dashboard

Events Overview

Marketers often participate in trade shows, conduct seminars, and create Web events to generate leads. These types of events are the key means for you to educate potential customers about a product or service and to build a brand recognition. Oracle

Marketing provides comprehensive functionality to manage key marketing events.

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

- Track event information. This includes information about the event's deliverables, budgets, registration, speakers, and directions

- Manage open and restricted registration using rules and lists

- Facilitate registration (from Oracle TeleSales, Oracle Marketing, and external sources)

- Integrate with call centers to distribute information and to facilitate registration

- Send event deliverables to enrollees that includes descriptions, directions, maps, and cover letters using Oracle Marketing.

Topics in this section include:

- The Events Process Flow, page 23-2

- One Off Events, page 23-4

The Events Process Flow

The following figure depicts a high-level process flow of working with events in Oracle Marketing. Each process has a list of tasks to be performed. They are not depicted in any particular order. You can organize them based on the business practices followed in your organization.

Events Process Flow
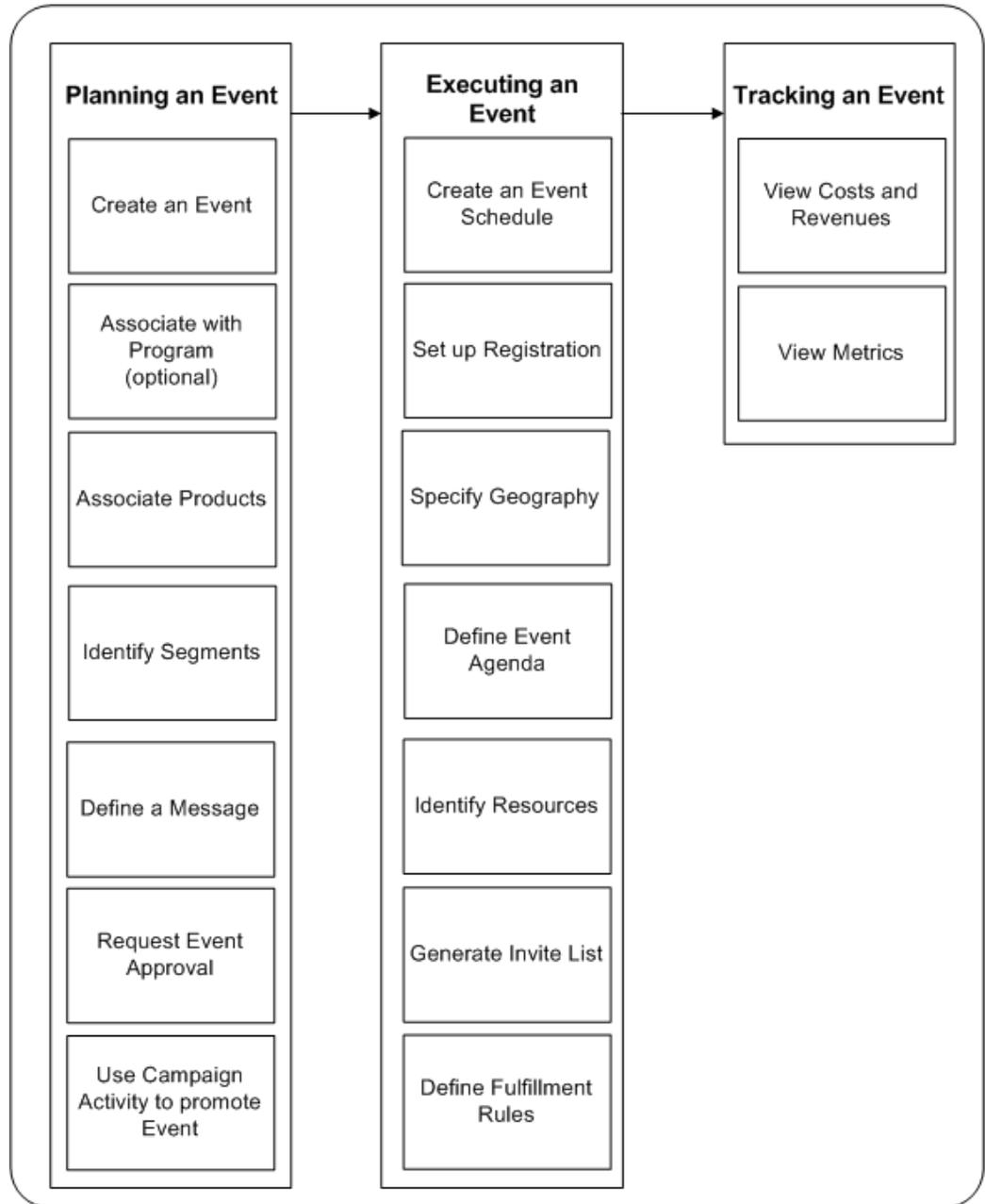
Planning an Event

Planning an event begins when you decide the purpose for your event - to showcase your product or service to existing or potential customers, for a social or charitable cause, and so on. You start by creating an event in Oracle Marketing. Next, you decide whether this event must be part of a larger marketing activity which may include other events, campaigns, and programs. If so, you will include this event as part of a

program.

It is important that the event is addressed to the right set of people who will be interested in your products or services. Therefore, the next step will be to identify the segment you will address during this event.

Every event can carry a special message that will convey the substance of the product, service, or the event itself. Additionally, you may want to specify the budget required for this event, and request for approval.

It is not enough if you only plan and organize an event. It must be well promoted so that your intended audience is made aware of the upcoming event, and prepare to attend it. You can promote an event by sending out event invitations through e-mail or direct mail print campaign activities.

Executing an Event

Thus far, the event has been planned and promoted. Next, you must create individual event activities to address the requirements in all the places where it is going to be held. If the event is to be held in San Francisco, Paris, and London, three event activities must be created.

The venue for the event must be booked, and all the necessary arrangements must be made to host the event.

The agenda for the events must be planned, and a communication must be sent out inviting people to register for the event.

You must also plan for event cancellation, or a date change. Fulfillment Rules can be set up to communicate to the registrants or invitees to handle such occurrences.

Tracking an Event

You can track the event either during its execution or after it is complete. During the event execution, you may view the rosters to see how many people registered. You can also use the Event Dashboard to view the registrants based on their industry, job, or country.

You can also view the costs that were incurred for this event, and also revenues generated. Using Metrics, you can assess the effectiveness of the event activity.

One Off Events

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

Creating and Managing Events

An event holds the general description of itself and provides the structure for reporting

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

Procedures in this section include:

- Creating an Event, page 23-5

- Associating Segments to an Event, page 23-6

- Associating Products with an Event, page 23-6

- Associating Metrics with an Event, page 23-6

- Associating Costs and Revenues with an Event, page 23-7

- Specifying a Budget for the Event, page 23-7

- Defining a Message for the Event, page 23-7

- Specifying the Geography for the Events, page 23-8

- Associating a Category with an Event, page 23-8

- Promoting an Event by Associating it with a Campaign, page 23-8

- Publishing Notes for an Event, page 23-8

Creating an Event

Use the following information to create an event.

Navigation: Event > Events

Notes

- **Setup:** Selecting a type determines which side navigation links are available. These types are set up by your administrator.

- **Source Code:** You can also leave the source code field blank and the system will generate a unique code after the creation of the event.

- **Global:** Indicates that the event will be global. The global source code is used for reporting.

- **Confidential:** Restricts access and view to this event to the team associated with the event till the event is in the Active status. Other teams will not be able to view the event.

- **Pass Attendees as Leads:** Lead records are created for every person who attends the event

- **Pass Registrants as Leads:** Lead records are created for every person who registered for the event

- **Currency:** You may update the currency field at any time during the theme approval process. The currency field becomes read-only after budget approval.

Associating Segments to an Event

A segment can be defined as a selection criteria that will be used to generate the target groups for an event activity. For example, a segment could be defined as a condition to obtain residents living in the state of California. If this segment is associated with a target group, then the number of records satisfying the segment criteria at the time of generating the target group will be considered as part of the target list entries.

Navigation: Event > Events > Segments

Notes

- The target group is generated only at the Event Activity level. The entries generated are also not validated against the segment associated with an event. Associating a segment with an event is only for information purposes.

Associating Products with an Event

If you are organizing an event to promote a product or service, use the following navigation to associate a product or service with it. Associating a product to an event can be used for reporting. For example, to report the number of events which promoted a specific product.

Navigation: Event > Events > Products

Associating Metrics with an Event

Use the following information to associate an existing metric with an event.

Prerequisite: The required metric must have been set up by the System Administrator.

Navigation: Event > Events > Metrics

Notes

- The metrics template functionality allows the setup of metrics at an object or custom setup level.

- **Transaction Date:** The Transaction Date is a reference for you. It is not used within the metrics logic.

Associating Costs and Revenues with an Event

Use the following information to associate existing costs and revenues metrics with an event.

Prerequisite: The required Cost or Revenue metric should be set up by the System Administrator.

Navigation: Event > Events > Costs and Revenues

Notes

- The metrics template functionality allows the setup of metrics at an object or custom setup level.

- **Transaction Date:** The Transaction Date is a reference for you. It is not used within the metrics logic.

- **Refresh:** Click this button to be able to view the Summary or Rollup metrics of the newly associated cost or revenue metric.

Specifying a Budget for the Event

The budget amount you specify here may be for the overall event. Using this information, the initial estimate can be communicated to the approvers during the approval process.

Navigation: Event > Events > Budget

Notes

- **Update:** After entering the initial estimate amount, click this button to be able to create a request.

- **Create Request:** When you create a request, you can specify the source for the funding and the amount that you wish to request for.

Defining a Message for the Event

A message can be defined as the overall theme or communication that forms a basis for the execution channel. The message associated to a marketing object is not executed automatically.

Messages are used to distinguish and position a product. Examples of messages include corporate and offering slogans, positioning statements, key branding marketing strategies, and so on. An example would be "Know More, Do More, Spend Less With Oracle Applications".

When you create a message, it is set to Active by default and is available to be associated with an event. When you no longer want a message to be used, deselect the Active check box.

Notes

- To download the messages list from the Messages page, click the Download to CSV File icon in the Messages page and save the file in the required folder on your desktop.

Specifying the Geography for the Events

An event can be held at different locations. You create individual event activities to specify details such as the venue, the speakers, and so on.

Use the following information to specify the geographies where your events will be held.

Notes

- **Level:** Select a geography level. For example, if an event is held in several places within the same country, then you might choose City as the level. If it is being held in several countries, then you would choose Country.

Associating a Category with an Event

Events can belong to different categories. You can associate a category with an event and use it for reporting purposes.

Prerequisite: Categories should have been set up by the System Administrator.

Promoting an Event by Associating it with a Campaign

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

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

Publishing Notes for an Event

Events can have publishable notes. For Events, notes of type "venue information," for example, give information about the execution of an event activity related to the venue. This could include comments made by the event managers for other venue users to

keep in mind. The venue information notes are available to all venue users.

Navigation: Events > Events > Publishable Notes

Teams

Click the Team link to review the team for the marketing object you are working on. You can add or delete team members.

For each team member, specify whether or not the team member is allowed to edit metrics for the marketing object. This means the team member has access to budgets, costs, and revenues as well as metrics.

About Contact Points

Whenever you create a marketing object, you can define contact points that other applications can direct customers to for further information. For example, if you specify your Web site name as the contact point, customers visiting related sites can be directed to visit it for marketing related information. You can also associate Inbound and Outbound scripts as contact points. The outbound communication about contact points such as URLs is a manual process and the information is stored here for information purposes. See Associating Scripts to a Campaign Schedule, page 11-14 for more details.

Creating Event Schedules

Event Schedules set up the actual delivery of the event. They determine when and where an event is going to take place, what the methodology is, and how the responses will be captured.

Using Event Schedules functionality, you can:

- Create event agendas with multiple tracks and multiple sessions

- Create track and session details

Procedures in this section include:

- Defining Event Details, page 23-10

- Specifying the Invitation List for an Event Activity, page 23-11

- Setting Up Event Registrations, page 23-11

- Registering Participants for an Event, page 23-12

- Creating Event Agenda Tracks and Sessions, page 23-12

- Entering Event Coordinators and Other Resources, page 23-12

- Specifying Deliverables for the Event, page 23-17

- Defining Fulfillment Rules, page 23-17

- Creating Venues, page 23-17

- Viewing the Roster, page 23-18

- Viewing the Dashboard, page 23-18

Defining Event Schedule Details

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

Navigation: Events > Event Schedules

Notes

- **Setup Type:** The custom setup is created by the administrator and determines the type of information to track with an event schedule.

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

- **Global:** Indicates that the event will be global. The global source code is used for reporting purposes.

- **Confidential:** Restricts access to this event schedule to a particular team till the event schedule is in the Active status.

- **Registration Required:** Specifies if registrations must be taken for this event activity.

- **Invite Only:** Only people on the invite list associated to the event schedule will be able to register.

- **Payment Required:** Specifies if this is a paid event schedule.

- **Pass Attendees as Leads:** Lead records are created for every person who attends the event. If this option is selected at the Event level, it is automatically selected at the Event Schedule level too.

- **Pass Registrants as Leads:** Lead records are created for every person who registered for the event. If this option is selected at the Event level, it is automatically selected at the Event Schedule level too.

Specifying the Invitation List for an Event Schedule

To specify the audience for an event schedule, you can create and generate an invitation list.

Prerequisite: A list of invitees

Navigation: Event > Event Schedules > Invite List or Event > Events > Event Schedule

Notes

- Persons who are not on the invitation list for an "invite only" event cannot register for the event.

- **Generate List:** The list is generated and is in the Draft status. To make the list Active, you must run the Workflow Agent Listener concurrent program. For more details, see the *Oracle Marketing Implementation Guide*.

- **View Entries:** After the invite list is generated, you can add entries manually to it. Use the Add Entries Action in the List Details page. Note that after adding manual entries, if you regenerate the list in the Full Refresh mode, the manual entries will be lost. See Adding Manual List Entries, page 4-17 for more information on adding manual entries to lists.

- **Target Group Locking:** To prevent losing of tracking information about customers who are targeted in a campaign or an event, the Invite List (Target Group) is automatically "Locked" when an event schedule becomes Active, and the Invite List details cannot be modified. This ensures that measurements for the event, such as responses, orders, revenue, and so on are measured against a constant set of target customers.

Setting Up Event Registrations

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

Navigation: Events > Event Schedules > Registration Setup

Notes

- **Enrollment Start and End Dates:** These dates specify when the registration will open for this event. Registrations can only take place between the enrollment start and end dates.

- **Minimum Required Registrants and Attain Minimum By Date:** This data is used for informational purposes only.

- **Credit Type and Credits:** Use these fields when the organization awards credits for attendance. This data is for informational purposes only.

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

Registering Participants for an Event

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

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

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

Prerequisite: An existing event schedule with valid registration dates

Navigation: Events > Registrations

Notes

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

Creating Event Agenda Tracks and Sessions

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

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

Navigation: Events > Event Schedules > Event Agenda

Entering Event Coordinators and Other Resources

Event coordinators and resources act as hosts during the event. They participate as as speakers, technical personnel, marketing personnel, support executives, and so on.

Navigation: Events > Event Schedules > Resource

Creating a Deliverable

Use the information in the following topics to perform activities related to creating and storing deliverables.

- Overview of Deliverables, page 23-13

- Entering Basic Deliverable Details, page 23-14

- Defining the Inventory Options for a Deliverable, page 23-15

- Creating a Kit, page 23-15

- Associating a Budget to a Deliverable, page 23-15

- Adding Associated E-Mail Electronic Files to a Deliverable, page 23-16

Overview of Deliverables

Deliverables are marketing collateral that you can distribute to customers across multiple channels. A deliverable in Oracle Marketing is a physical or electronic collateral, which you can associate with a campaign or an event. Examples can include a brochure for an event, a promotional campaign advertisement, a data sheet for a product launch campaign, or special offers for promoting brand loyalty.

The content associated to electronic deliverables is stored in Oracle Content Manager (OCM). The OCM content is available to be used in marketing cover letters. For more information, refer the *Oracle Content Manager Implementation and Administration Guide*.

Some of the attributes that you can set for a deliverable include:

- Define its storage and fulfillment. Physical deliverables may be stocked manually or as inventory items. Examples include brochures, CDs, or gifts to promote a product during campaigns or events. Electronic deliverables are stored on Oracle Marketing and fulfilled as attachments or cover letter content. Electronic files include Web content, e-mail blocks, and mailing scripts to support your campaigns and events.

- Set the Confidential flag to ensure that only you and your team can access it until such time as you include other teams and users to allow them access. When a deliverable's status changes to Final Loaded, the Confidential check box is automatically unchecked and the deliverable is now accessible to all users.

- Mark and associate it as a kit. For example, you may want to include a product data sheet and a discount coupon in a kit that will be given to all the attendees of an event.

- Attach some text, a file, or a URL to it. For example, you may want to attach a

product data sheet as a file to a deliverable.

A deliverable may have a theme associated with it. For example, a product promotion campaign may need large, colored posters to be attached to magazines. The theme must be approved before posters can be created and used as deliverables for the campaign.

A deliverable may or may not need funds. When it needs funds, you can associate a budget to it and the budget must be approved. For example, you may need funds to contract out brochure creation to a third party vendor, whereas an electronic product data sheet may not need funds. If a deliverable does not need budget approval, an administrator can disable budget approval in the custom setup.

Once a deliverable gets both budget and theme approvals (budget is approved first and then the theme is approved), its status changes to Final Loaded and is available for fulfillment across campaigns and events. See Approvals Overview, page 2-7 for information about the Approval process.

After the end date, you can set a deliverable's status to Expired so that it is no longer used. However, it can still be accessed. When a deliverable is no longer needed, you can archive it. An archived deliverable cannot be accessed or used. You can also cancel a deliverable any time in its life cycle. A canceled deliverable too, cannot be accessed or used. Campaigns or events which use the archived or canceled deliverables are notified of the status change.

Entering Basic Deliverable Details

Use the following information to enter the basic details when you create a deliverable.

Navigation: Deliverable > Deliverable

Notes

- **Setup Type:** The setup type defines the attributes for a deliverable that become enabled and the options that the system will display. A given setup type may also block a budget or costs option for electronic mediums that do not require budgeting.

- **Categories:** Categories are used for reporting. The categories displayed in the list depend on the setup type selected and the sub categories displayed are those associated with the category.

- **Delivery Medium:** Physical items are stocked manually or stored as inventory items. Electronic items are stored in Oracle Marketing and fulfilled through cover letter associations.

- **Start Period and End Period:** When you have entered the Start Period and End Period dates, based on them, the Available From and Available To dates are automatically displayed. These dates are primarily for execution purposes. Active objects are available in other applications even if the end dates have passed.

- **Due Date:** This date is just for your information and is the date by when the deliverable must be ready. The date must be on or before the Available From date.

- **Confidential:** Use this check box to restrict access to the deliverable. If it is selected, only the owner and the team members will be able to access the object. If the check box is not selected, non team members will have a restricted read access to the object.

Defining the Inventory Options for a Deliverable

Use the following information to define inventory options for a deliverable.

Navigation: Deliverable > Deliverable > Inventory Options

Notes

- If the deliverable is a Physical item, the options include Stock Manually and Inventory Item. If the deliverable is an electronic item, its Document Number is displayed and you have the option of adding it as an inventory item.

Creating a Kit

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

> **Note:** Do not mix delivery mediums in the same kit. For example, if a deliverable assigned as a kit is a manually stocked item, all the deliverables that you want to include in the kit must also be manually stocked items.

Use the following information to associate a number of deliverables to a kit. The kit itself must be created as a deliverable first before adding other deliverables to it.

Navigation: Deliverable > Deliverable

Notes

- **Name:** When the deliverable is referenced, the entire kit is fulfilled. The kit is not stored in Oracle Inventory. It is stored as a marketing object in Oracle Marketing.

- For physical, inventoried kit items, if the kit is created and one component of the kit is not in stock, any orders for the kit will be back ordered via Oracle Order Management and the kit will not be sent until all the items are available. However, an order for individual kit components can be placed, instead of for the entire kit.

Associating a Budget to a Deliverable

As for a variety of objects in Oracle Marketing, budgets are the source for funding for

deliverables.

Use the following information to enter an initial estimated budget to your deliverable and to create a budget request.

Navigation: Deliverable > Deliverable > Budget

Notes

- **Update:** After entering the initial estimate amount, click this button to be able to create a request.

- **Create Request:** When you create a request, you can specify the source for the funding and the amount that you wish to request for.

Adding Associated E-Mail Electronic Files to a Deliverable

You can specify the content of an electronic deliverable for an e-mail body using the E-mail Content side navigation link for the deliverable. Use this to store corporate positioning statements, feature lists, benefits, or standard offering statements which can be used with multiple e-mail messages.

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

There are two types of electronic files available for deliverables:

- Electronic

- E-mail

Use the following information to add e-mail attachments to your deliverable.

Prerequisite: A deliverable of Activity Type E-mail must exist

Navigation: Deliverable > Deliverable > Email Content

Notes

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

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

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

Specifying Deliverables for the Event

Deliverables are takeaways given to participants during an event. Use this feature to only specify the deliverables for an event. You must manually fulfill them at the event. For more information on deliverables, and how to work with deliverables in Oracle Marketing, see Overview of Deliverables, page 23-13.

Defining Fulfillment Rules

Using the following fulfillment templates, registered users can be notified.

- Invitation: E-mails are sent to all members in the Invite List.

- Registration Confirmation: E-mails are sent confirming a registration.

- Registration Cancellation: E-mails are sent cancelling a registration.

- Wait List Confirmation: E-mails are sent that a wait listed registrant is confirmed.

- Venue Change: E-mails are sent intimating a change in the event venue.

- Event Date Change: E-mails are sent intimating a change in the date of the event.

- Event Cancellation: E-mails are sent intimating the cancellation of an event.

Some default notifications are set up using the Administration tab. You do have the ability to override the content associated with each of these actions using the functionality located within the Events tab. All changes made here, however, effect only the specific activity with which you are working.

Navigation: Event > Event Schedules > Fulfillment Rules

Creating Venues

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

Venue Room

Multiple rooms can be created for each venue. When a session is created, the rooms associated with the venue are available for selection at the session level. This is mainly used for planning purposes.

Venue Rates

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

Navigation: Event > Venue

Associated Events

To evaluate venues, you can view the details of the events that are associated with it.

Navigation: Event > Venue

Viewing the Roster

The event roster provides a real-time view of the status of registrations at an event schedule level.

The event registration roster contains information regarding the customers who have registered for the event. In addition to the registrants' information, the roster also indicates the channel of registration, the status of the registrations, and information regarding the attendance.

Navigation: Event > Event Schedules > Roster

Event > One Off Events > Roster

Notes

- **View:** The registration status - Cancelled, Registered, and Waitlisted.

Viewing the Events Dashboard

The events dashboard provides a graphical representation on the event roster and segregates the registrants by registration source, industry, country and job title.

Navigation: Event > Event Schedules > Dashboard

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Working with Home Page Bins, Reports, and Charts

This chapter covers the following topics:

- Marketing Intelligence Overview
- Personalizing Home Page Bins, Reports, and Charts
- Home Page Bins
- Campaign Effectiveness Bin
- Completed Web Surveys Bin
- Event Effectiveness Bin
- Lead Import Statistics Bin
- Lead to Opportunity Bin (Key Metrics)
- Lead Quality Bin
- Lead Sources Bin
- Marketing Activities Bin
- Marketing Budgets Bin
- Response to Lead Bin (Key Metrics)
- Home Page Reports
- Budget Utilization Report (Budget by Total Amount)
- Budgets by Activity Report
- Budgets by Business Unit Report
- Budgets by Campaign Report
- Campaign Conversion Rate Report
- Campaign Cost and Revenue Report

- Campaign Cost, Revenue, and ROI Report

- Campaign to Order Report

- Campaigns by Activity Report

- Activities by Campaign Report

- Marketing Activities Report

- Campaign Budget Amount by Activity Type Report

- Campaigns by Leads and Opportunities Report

- Conversion Rates by Sales Group Report

- Event Cost and Revenue Report

- Event Cost, Revenue and ROI Report

- Events by Budget Amount Report

- Events by Event Type Report

- Leads by Opportunity Report

- Events by Registrants Report

- Invalid Leads by Reason Report

- Lead Aging by Quality Reports

- Lead Aging by Sales Group Report

- Lead Assignment and Conversion by Sales Group Reports

- Lead Import Statistics by Campaign Report

- Lead Import Statistics by Region Report

- Lead Quality by Campaign Report

- Lead Quality by Region Report

- Lead Quality by Status Report

- Lead Sources by Campaign Report

- Lead Sources by Region Report

- Lead Sources by Status Report

- Lead Status by Campaign Report

- Responses by Activity Report

- Responses by Campaign Report

- Home Page Charts

Marketing Intelligence Overview

Marketing intelligence is displayed as bins, reports, and charts on the Home page of Oracle Marketing, and provides summary information about key marketing activities, along with links to recently accessed campaigns and events.

Security for Bins, Reports, and Charts

There are two types of Home Page Reports:

- Marketing Intelligence reports

- Leads Intelligence reports

Marketing Intelligence Security

Marketing Intelligence security utilizes the Oracle Marketing security Model. Members of the Oracle Marketing Administration group can access all marketing intelligence reports. Users who are not members of this group can view reports for all the marketing objects they have access to (either directly or via a Team).

Leads Intelligence Security

Users who are managers or Administrators of sales groups can view Leads Intelligence reports. Such users can view data corresponding to their sales group. For a list of marketing and leads intelligence reports, see the table Home Page Marketing Intelligence Reports, page 24-24 and the table Home Page Leads Intelligence Reports, page 24-26.

Most Recent Bins

Most Recent bins display links to recently accessed campaigns and events. The links are generated automatically when you create or edit a campaign or event. The links navigate you to the details page for the object type. Most Recent bins are available for campaign and event objects.

Reporting Bins

Reporting bins display trend performance information for key marketing activities. Some examples include campaign effectiveness, event effectiveness, and marketing budgets. Each reporting bin contains links to more granular detailed reports.

Reports

Reports displayed directly on the Home page are drill-down reports linked from a

reporting bin, but with a configurable date range specified by the user. The date aggregate for the report is inherited from the calling bin. For example, when drilling down on the month of September, all data for the drill down reports is about September.

Charts

Charts display trend performance information for key marketing activities. They illustrate information based on date ranges specified by the user.

In Oracle Marketing, charts render the top comparisons. For example, if you are viewing a Campaigns by Leads chart and the number of rows to display is 10, then the chart for Campaigns by Leads will show the Top 10 Campaigns by Leads.

> **Note:** Home page reports can be used by Oracle 8i customers. Oracle 9i customers should implement Oracle E-Business Intelligence, and refer the *Daily Business Intelligence User Guide* for information on the various reports and charts available.

Personalizing Home Page Bins, Reports, and Charts

Each bin, report, and chart has configurable parameters. These parameters are either general or specific to the bin, report, or chart. For example, specific parameters may relate only to budgets. These parameters are available only from the Budget bins, reports, and charts.

Use the following procedures to personalize your Home page:

- Specifying Home Page Bins, Reports, and Charts, page 24-4

- Editing a Home Page Bin, page 24-4

- Editing a Home Page Report, page 24-5

Specifying Home Page Bins, Reports, and Charts

To personalize the available bins, reports, and charts that are displayed on your Home page, navigate to Home > Home > Personalize.

Editing a Home Page Bin

To edit a home page bin, navigate to Home > Home, and click the Edit link for the bin. Click the Personalize side navigation link to set your favorites, and the parameters and attributes for the bin.

Editing a Home Page Report

Reports displayed directly on the Home page are drill-down reports displayed from a reporting bin, but with a configurable aggregate. Because Home Page reports are not derived from a reporting bin, the aggregate must be configured. Similar aggregates are available as they are in the bins.

Columns and rows to display on a report are configurable via the Edit link.

Drill-down reports do not allow for data aggregation selection. The aggregate is inherited from the calling bin.

Editing Home Page Charts

Charts always represent the top comparison of components. For example in the Campaigns by Leads chart, if the number of rows to display was set to 10, then the chart renders with the top 10 Campaigns by Leads.

Rows to display in a chart can be configured by using the Edit link.

You can perform the following edits:

- Edit link in header of chart

- Specify the period

- Specify the number of data elements

- Select the chart type

Home Page Bins

This section presents a detailed listing of the components of the bins available in Oracle Marketing. Bins are displayed on the Oracle Marketing home page. Prior to displaying bin data, you must implement market intelligence, as described in the *Oracle Marketing Implementation Guide*.

The following table summarizes the available bins.

Home Page Bins

Name	Description	Related Section
Campaign Effectiveness	Summarizes the total number of leads and lead amount created against campaigns during the period	Campaign Effectiveness Bin, page 24-10
Completed Web Surveys	Summarizes the total number of leads added, invalid and went into lead import from the web response point of view during the period. Also calculates the change since the last period.	Completed Web Surveys Bin, page 24-10
Event Effectiveness	Summarizes the total number of registrations, leads and lead amount created against events during the period	Event Effectiveness Bin, page 24-11
Lead Import Statistics	Summarizes the total number of leads added, valid, invalid and new from import point of view during the period. It also calculates the change since the last period.	Lead Import Statistics Bin, page 24-12
Lead to Opportunity (Key Metrics)	Summarizes the Key Performance Indicators like Lead Coverage and Lead to Opportunity from Lead Intelligence and other modules.	Lead to Opportunity Bin (Key Metrics), page 24-13
Lead Quality	Summarizes total number of leads by quality (rank) during the period. Also calculates the change since the last period.	Lead Quality Bin, page 24-16
Lead Sources	Summarizes total number of leads by source of origin during the period. Also calculates the change since the last period.	Lead Sources Bin, page 24-17

Name	Description	Related Section
Marketing Activities	Summarizes the number of active marketing activities for a given period	Marketing Activities Bin, page 24-17
Marketing Budgets	Summarizes the amount of budget committed, utilized and balance for a given period	Marketing Budgets Bin, page 24-18
Response to Lead (Key Metrics)	Summarizes the Key Performance Indicators from Oracle Marketing and other modules	Response to Lead Bin (Key Metrics), page 24-19
Responses	Summarizes the total number of responses added and converted during the period. Also calculates the change since the last period.	Response to Lead Bin (Key Metrics), page 24-19

When you view the Home page bins, you can set different parameters. The following table provides a comprehensive list of these parameters and their descriptions. A subset of these parameters will be applicable to each bin.

Home Page Bins Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. Users can choose a business unit or 'All' for all business units. Default is set to 'All'.

Parameter Name	Description
Aggregate By	Data can be aggregated by period. The default period is Quarter.

Aggregate By — continued:

- Month - Aggregates by Month defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'.

- Quarter - Aggregates by Quarter defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'.

- Year - Aggregates by Fiscal Year defined in GL Calendar associated with the profile option 'AMS Marketing Calendar'.

- Incremental (Day, Week, Month, Quarter, Year)

  Aggregated as follows:

- Day is 24 hours prior to Last Refresh Date/Time.

- Wk is 7 days prior to Last Refresh Date/Time (Rolling 7 Days).

- Mth is from start of current month to Last Refresh Date/Time.

- Qtr is from start of current fiscal quarter to Last Refresh Date/Time.

- Yr is current fiscal quarter plus previous 3 fiscal quarters (Rolling 4 Quarters).

  Examples:

- Day 9-Nov-02 to 10-Nov-02

- Wk 4-Nov-02 to 10-Nov-02

- Mth 1-Nov-02 to 10-Nov-02

- Qtr 1-Sep-02 to 10-Nov-02

Parameter Name	Description
	• Yr 1-Dec-01 to 10-Nov-02
Fixed Calculation Period	Data can be aggregated by period. Default is Quarter. • Daily - Last 24 hours (Last refresh date) • Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday. • Monthly - Start of month, up to 30 days. • Quarterly - Start of current quarter, up to current date. • Yearly - Start of current fiscal year, up to current date. Examples: • Daily 9-Nov-02 to 10-Nov-02 • Weekly 4-Nov-02 to 10-Nov-02 • Monthly 1-Nov-02 to 10-Nov-02 • Quarterly 1-Sep-02 to 10-Nov-02 • Yearly 1-Jun-02 to 10-Nov-02
Scale by	Scale the amount columns by user choice. Available options: • Units • Hundreds • Thousands • Millions

Campaign Effectiveness Bin

This bin summarizes the total number of Leads and Lead Amounts created against Campaigns during the period. This bin comprises all leads except dead leads. The following table describes the columns of the Campaign Effectiveness bin.

Campaign Effectiveness Bin Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyper linked to the following drill down reports: • Campaigns by Leads and Opportunities • Campaigns by Activity • Campaigns by Budget Amount • Campaign to Order The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Lead	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaign during the period.

Completed Web Surveys Bin

This bin summarizes the web responses information for the period. The following table describes the columns of this bin.

Completed Web Surveys Columns

Column Name	Description
Added	The total number of completed web surveys for the time period.
Invalid	The number of completed web surveys that are invalid.
To Lead Import	The number of completed web surveys that were passed to the lead import engine.

The period displayed is hyperlinked to the following drill down reports:

- Completed Web Surveys by Region

- Completed Web Surveys by Campaign

- Invalid Web Surveys by Reason

Event Effectiveness Bin

This bin summarizes the total number of Registrations, Leads and Lead Amounts created against Events during the period. This bin summarizes all leads except dead leads. The following table describes the columns of this bin.

Event Effectiveness Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyperlinked to the following drill down reports: • Events by Leads and Opportunities • Events by Event type • Events by Budget Amount • Events by Registrants The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Registration	Total number of registrations created against the events during the period.
Lead	Total number of leads created against the events during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the events during the period.

Lead Import Statistics Bin

This bin summarizes the lead import statistics during the period. The following table describes the columns of this bin.

Lead Import Statistics Columns

Column Name	Description
Added	The total number of valid, invalid and new leads.
Valid	The number of successfully imported leads.
Invalid	The number of lead import failures.
New	The total number of leads added to the import interface engine during the period.

The period displayed is hyperlinked to the following drill down reports:

• Lead Import Statistics by Region

• Lead Import Statistics by Campaign

• Invalid Leads by Reason

Lead to Opportunity Bin (Key Metrics)

This bin summarizes the Key Performance Indicators from Lead Intelligence and other modules. The following table describes the columns of this bin.

Lead to Opportunity Columns

Column Name	Description
Key Metrics	Key Metrics: • Leads Assigned • Lead to Opportunity Each key metric is a hyperlink to drill down detail reports specific to each key metric. Lead Assignment drill down to the following reports: • Conversion Rates by Sales Group • Campaign Conversion Rates The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Value	• Lead Coverage For this key metric, the value is calculated as the total amount of open leads in the system with how many are currently being worked on. This is a percentage. OPEN = status of OPEN only Formula: (assigned/lead open)*100 • Lead to Opportunity For this key metric, the value is calculated by dividing the number of leads that have been converted to opportunities by the total amount of leads in the system. This is a percentage. Total # of Leads = all lead statuses minus dead leads Formula: Converted/Total # of leads * 100

Column Name	Description
Change	• This column is the percentage representation of the difference between the current Lead Assignment value and the Lead Assignment value from the previous time aggregate. • This column is the percentage representation of the difference between the current Lead to Opportunity value and the Lead to Opportunity value from the previous time aggregate.
Status	The Status column is common across all Key Metrics. The indicator arrow images mean the following: Green Up indicates data increasing over the comparison period and that for this attribute, an increase is good. Green Down indicates data decreasing over the comparison period and that for this attribute, the decrease is good. Red Up indicates data increasing over the comparison period and for this attribute, an increase is bad. Red down indicates data decreasing over the comparison period and that for this attribute, a decrease is bad.

Status Indicators	-	-	-	-	-
Column	**From Prev Period**	**GreenUp**	**Green Down**	**Red Up**	**Red Down**
Leads Assigned	Increase	X	-	-	-
Leads Assigned	Decrease	-	-	-	X

Status Indicators	-	-	-	-	-
Column	**From Prev Period**	**GreenUp**	**Green Down**	**Red Up**	**Red Down**
Lead to Opportunity	Increase	X	-	-	-
Lead to Opportunity	Decrease	-	-	-	X

Lead Quality Bin

This bin summarizes the total number of leads created per rank during the period. The following table describes the columns of this bin.

Lead Quality Bin Columns

Column Name	Description
First Defined Rank	The A, B, and C columns of this bin are defined at: Administration, Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	These are leads belonging to ranks not shown in the first three columns.
Total	Total leads by all ranks during the period.

The period displayed is hyperlinked to the following drill down reports:

- Lead Quality by Region

- Lead Quality by Campaign

- Lead Quality by Status

Lead Sources Bin

This bin summarizes the total number of leads created per source during the period. The following table describes the columns of this bin.

Lead Sources Columns

Column Name	Description
First Defined Source	The A, B, and C columns of this bin are defined at: Administration > Marketing > Setup > Code Definition, Object Type Source.
Second Defined Source	N/A
Third Defined Source	N/A
Others	Leads belonging sources not shown in the first three columns.
Total	Total leads by all sources during the period.

The period displayed is hyperlinked to the following drill down reports:

- Lead Source by Region

- Lead Source by Campaign

- Lead Source by Status

Marketing Activities Bin

This bin summarizes the number of active marketing activities for a given period. The following table describes the columns of this bin.

Marketing Activities Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'.

Column Name	Description
Count	The number of active marketing activities at the start of the period.
Started	The number of marketing activities activated during the period.
Ended	The number of marketing activities that ended during the period.
Change	The change from previous value to current value. Formula: ((Current - Previous) / Previous) * 100

Marketing Budgets Bin

This bin summarizes the amount of Budget committed, utilized and balance for a given period. Note that only those budgets, which are active during the given time period, are considered for calculating these figures. For example, a budget is active for a period of 3 months starting from '01-Mar-2001' to '31-May-2001'. This budget is considered for calculating the total committed, utilized and balance amounts only for months of March, April and May 2001. The following table describes the columns of this bin.

Marketing Budgets Columns

Column Name	Description
Period	Period is displayed based on the option chosen in parameter 'Aggregate by'. The period displayed is hyperlinked to the following drill down reports: • Budgets by Utilization • Budgets by Activity • Budgets by Campaign • Budgets by Business Unit The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.
Committed	The sum of all the budget commitments or approvals made during the period.
Utilized	The sum of all the budgets utilization occurred during the period. Budget utilization is recorded only the Actual costs are posted to Budgets.
Balance	The sum of the balance of all the budgets which are active during the period.

> **Note:** When budget facts are loaded, the program will consider pre approval transactions. When pre approval transactions are considered, there may be time periods for which there is no data. The summarized data may not have information in the comparative period and thus may not be able to display a positive or negative value in the form of an arrow.

Response to Lead Bin (Key Metrics)

This bin summarizes the Key Performance Indicators from Oracle Marketing and other modules. The following table describes the columns of this bin.

Response to Lead Columns

Column Name	Description
Key Metrics	Key Metrics:
	• Leads
	• 'A' Lead Ratio
	• Cost per Lead
	• Revenue per Lead
	Each key metric is a hyperlink to drill-down detail reports specific to each key metric. Currently Leads and 'A' Lead Ratio drill down to the following reports and charts.
	Reports:
	• Campaign Cost and Revenue and ROI
	• Event Cost and Revenue and ROI
	• Campaign to Order
	The reports do not inherit the bin parameters. However, the user has the choice of changing the parameters on the report.
	Chart:
	• Leads and Cost Per Lead
	Cost per Lead and Revenue per Lead drill down to the following reports:
	• Campaign Cost and Revenue
	• Event Cost and Revenue
	The reports inherit the Bin parameters and their values. However, the user has the choice of changing the parameters on the report.

Column Name	Description
Value	• Leads Shows the total amount of all leads, except dead leads, during the period.
	• 'A' Lead Ratio Shows the percentage of 'A' (top) quality leads of all leads during the period. (This is all leads except dead leads.) The Value is calculated by dividing the number of all 'A' quality leads during the period by the total number of leads.
	• Cost per Lead Shows the budgetary cost of generating all leads during the period. The Value is calculated by dividing the budget of all current Campaign and Events during the period by the total number of leads. Equally allocated per "active" day.
	• Revenue per Lead shows the booked revenue ratio as a result of all leads that were generated during the period. The Value is calculated by dividing the booked revenue associated with all leads during the period by the total number of leads.

Column Name	Description
Change	• Leads: The Change is calculated by comparing the total number of leads for the current period with the total number of leads for the previous refresh period. E.g. if on October 1 there were 1,000 leads and on November 1 there were 1,200, to get the % Change, take ((1,200 - 1,000)/1,000) * 100. The negative(-) or positive (+) signs indicate if the change is up or down from the previous period. • 'A' Lead Ratio: The Change is calculated by comparing the 'A' quality lead ratio for the current period with the 'A' quality lead ratio for the previous refresh period. • Cost per Lead: The Change is calculated by comparing the cost per lead ratio for the current period with the cost per lead ratio for the previous refresh period. • Revenue per Lead: The Change is calculated by comparing the revenue per lead for the current period with the revenue per lead for the previous refresh period.

Column Name	Description
Status	The Status column is common across all Key Metrics. The indicator arrow images mean the following: • Green Up - Indicates data increasing over the comparison period and that for this attribute, an increase is good. • Green Down - Indicates data decreasing over the comparison period and that for this attribute, a decrease is good. • Red Up - Indicates data increasing over the comparison period and that for this attribute, an increase is bad. • Red Down - Indicates data decreasing over the comparison period and that for this attribute, a decrease is bad.

Status by Column	-	-	-	-	-
Column	**From Prev Period**	**GreenUp**	**Green Down**	**Red Up**	**Red Down**
Leads	Increase	X	-	-	-
Leads	Decrease	-	-	-	X
A Leads	Increase	X	-	-	-
A Leads	Decrease	-	-	-	X
Cost/Lead	Increase	-	-	X	-
Cost/Lead	Decrease	-	X	-	-
Revenue/Lead	Increase	X	-	-	-

Status by Column	-	-	-	-	-
Column	**From Prev Period**	**GreenUp**	**Green Down**	**Red Up**	**Red Down**
Revenue/Lead	Decrease	-	-	-	X

Home Page Reports

This section presents a detailed listing of the reports available in Oracle Marketing. Reports are displayed on the Oracle Marketing home page. Prior to displaying Report data, marketing intelligence must be implemented, as described in the *Oracle Marketing Implementation Guide*.

The following table lists the Marketing Intelligence reports that can be displayed on the Oracle Marketing Home page:

Home Page Marketing Intelligence Reports

Report Name	Description	Related Section
Budget Utilization (Budget by total amount)	Summarizes budget utilization information	Budget Utilization Report (Budget by Total Amount), page 24-30
Budgets by Activity	Summarizes budget information per activity	Budgets by Activity Report, page 24-31
Budgets by Business Unit	Summarizes budget information per business unit	Budgets by Business Unit Report, page 24-31
Budgets by Campaign	Summarizes budget information per campaign	Budgets by Campaign Report, page 24-32
Campaign Cost and Revenue	Summarizes costs and revenues per campaign	Campaign Cost and Revenue Report, page 24-33
Campaign Cost, Revenue, and ROI	Summarizes costs, revenues, and return on investments per campaign	Campaign Cost, Revenue, and ROI Report, page 24-34

Report Name	Description	Related Section
Campaign to Order	Summarizes order information per campaign	Campaign to Order Report, page 24-35
Campaigns by Activity	Summarizes campaign information per activity	Campaigns by Activity Report, page 24-36
Activities by Campaign	Summarizes activity information per campaign	Activities by Campaign Report, page 24-37
Marketing Activities	Summarizes marketing activities information per activity	Marketing Activities Report, page 24-38
Campaign Budget Amount by Activity Type	Summarizes budget information per Activity Type	Campaign Budget Amount by Activity Type Report, page 24-39
Campaigns by Leads and Opportunities	Summarizes lead and opportunity information per campaign	Campaigns by Leads and Opportunities Report, page 24-39
Event Cost and Revenue	Summarizes costs and revenues per event	Event Cost and Revenue Report, page 24-41
Event Cost, Revenue, and ROI	Summarizes costs, revenues, and return on investments per event	Event Cost, Revenue and ROI Report, page 24-42
Events by Budget Amount	Summarizes budget information per event	Events by Budget Amount Report, page 24-43
Events by Event Type	Summarizes budget and event information per Event Type	Events by Event Type Report, page 24-44
Events by Leads and Opportunities	Summarizes lead and opportunity information per event	Leads by Opportunity Report, page 24-44
Events by Registrants	Summarizes registration information per event	Events by Registrants Report, page 24-45

Report Name	Description	Related Section
Responses by Activity	Summarizes Interaction History responses information by Activity	Responses by Activity Report, page 24-54
Responses by Campaign	Summarizes Interaction History responses information by campaign	Responses by Campaign Report, page 24-55

The following table lists the Leads Intelligence Reports that can be displayed on the Oracle Marketing Home page:

Home Page Leads Intelligence Reports

Report Name	Description	Related Section
Campaign Conversion Rates	Summarizes lead conversion rate information by campaign	Campaign Conversion Rate Report, page 24-32
Conversion Rates by Sales Group	Summarizes lead conversion rate information by sales group	Conversion Rates by Sales Group Report, page 24-40
Invalid Leads by Reason	Summarizes invalid leads by reason	Invalid Leads by Reason Report, page 24-45
Lead Aging by Quality	Summarizes leads information based on lead age by sales rank	Lead Aging by Quality Reports, page 24-46
Lead Aging by Sales Group	Summarizes leads information based on lead age by sales group	Lead Aging by Sales Group Report, page 24-47
Lead Assignment and Conversion by Sales Group	Summarizes lead assignment and conversion information by sales group	Lead Assignment and Conversion by Sales Group Reports, page 24-48
Lead Import Statistics by Campaign	Summarizes lead import statistics by campaign	Lead Import Statistics by Campaign Report, page 24-49

Report Name	Description	Related Section
Lead Import Statistics by Region	Summarizes lead import statistics by region	Lead Import Statistics by Region Report, page 24-49
Lead Quality by Campaign	Summarizes leads by rank per campaign	Lead Quality by Campaign Report, page 24-50
Lead Quality by Region	Summarizes leads by rank per region	Lead Quality by Region Report, page 24-51
Lead Quality by Status	Summarizes leads by rank per status	Lead Quality by Status Report, page 24-51
Lead Sources by Campaign	Summarizes leads by source per campaign	Lead Sources by Campaign Report, page 24-52
Lead Sources by Region	Summarizes leads by source per region	Lead Sources by Region Report, page 24-52
Lead Sources by Status	Summarizes leads by source per status	Lead Sources by Status Report, page 24-53
Lead Status by Campaign	Summarizes leads by status per campaign	Lead Status by Campaign Report, page 24-54

The following table lists and describes the parameters that can be set for Home page reports.

Home Page Reports Parameters

Parameter Name	Description	Remarks
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'll' for all Regions. Default is set to 'All'.	Applicable to all reports.

Parameter Name	Description	Remarks
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.	Applicable to all reports.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.	Not applicable to the following reports: • Invalid Leads by Reason • Lead Import Statistics by Campaign • Lead Import Statistics by Region • Lead Quality by Campaign
Scale by	Scale the amount columns by user choice. Available options: • Units • Hundreds • Thousands • Millions	Applicable to all reports.

Parameter Name	Description	Remarks
Fixed Calculation Period	• Data can be aggregated by period. Default is Quarter.	Applicable to the following reports:
	• Daily - Last 24 hours (Last refresh date)	• Campaign by Conversion Rate
	• Weekly - Start of week to current date, up to 7 days. Week begins on a Sunday.	• Campaign Cost and Revenue
	• Monthly - Start of month, up to 30 days.	• Conversion Rates by Sales Groups
	• Quarterly - Start of current quarter, up to current date.	• Event Cost and Revenue
	• Yearly - Start of current fiscal year, up to current date.	• Lead Assignment and Conversion by Sales Group
	Examples:	
	• Daily 9-Nov-02 to 10-Nov-02	
	• Weekly 4-Nov-02 to 10-Nov-02	
	• Monthly 1-Nov-02 to 10-Nov-02	
	• Quarterly 1-Sep-02 to 10-Nov-02	
	• Yearly 1-Jun-02 to 10-Nov-02	

Parameter Name	Description	Remarks
Period	Data can be aggregated by period. Default is Current Quarter. For campaigns, lists of all fiscal years and all quarters are available. For Events, lists of 4 fiscal years and 16 quarters are available.	Applicable to the following reports: • Campaign Cost, Revenue and ROI • Event Cost, Revenue and ROI

Budget Utilization Report (Budget by Total Amount)

This report summarizes Budget utilization information. The following table describes the columns of this report.

Budget Utilization Columns

Column Name	Description
Budget Name	Budget name
Total	This represents total budget minus holdback.
Planned	Sum of planned amount. Planned amount is any amount for which new campaigns or offers are in Waiting or Approval stage.
Committed	Sum of committed amount. Committed amount is any amount for campaigns with an Approval status.
Utilized	Sum of the amount of total budget earned or used.
Balance	Sum of the amount of funds available for further activity. Balance = Budget – Committed

Column Name	Description
Paid	Sum of paid amount. Paid amount is the total paid on the promotion, amounts deducted on the face of the invoice, rendered checks and submitted credit memos.
Category	The category in which the budget falls.

Budgets by Activity Report

This report summarizes Budget information per Activity. The following table describes the columns of this report.

Budget by Activity Columns

Column Name	Description
Activity	Activity name.
Number of Budgets	The number of budgets currently opened for this Activity.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity.

Budgets by Business Unit Report

This report summarizes Budget information per Business Unit. The following table describes the columns of this report.

Budget by Business Unit Columns

Column Name	Description
Business Unit	Business Unit name.
Number of Budgets	The number of budgets currently opened for this business unit.
Approved Budget Amount	This represent total budget that is approved.
Awaiting Approval Budget Amount	Sum of planned amount. Planned amount is any amount for which new campaigns or offers are in Waiting or Approval stage.

Budgets by Campaign Report

This report summarizes Budget information per Campaign. The following table describes the columns of this report.

Budgets by Campaign Column

Column Name	Description
Campaign Name	Campaign name.
Number of Budgets	The number of budgets currently opened for this Campaign.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity.

Campaign Conversion Rate Report

This report summarizes the rate of lead conversion to opportunities, quotes and orders by sales group. The following table describes the columns of this report.

Campaign Conversion Rate Columns

Column Name	Description
Campaign	Campaign Name.
Total Leads	Sum of total leads during the period.
Open Leads	Sum of open leads during the period.
% Converted Leads	The number of opportunities divided by total leads multiplied by 100.
Total Opportunities	Sum of total opportunities during the period.
Open Opportunities	Sum of open opportunities during the period.
Converted to Quotes	The number of quotes divided by total opportunities multiplied by 100.
Total Quotes	Sum of total quotes during the period.
Open Quotes	Sum of open quotes during the period.
Converted to Orders %	The number of orders divided by total quotes multiplied by 100.

Campaign Cost and Revenue Report

This report summarizes Costs and Revenues per Campaign. The following table describes the columns of this report.

Campaign Cost and Revenue Columns

Column Name	Description
Campaign	Campaign Name.

Column Name	Description
Total Cost	Period-to-date cost which is the cumulative amount of the approved budget for the period.
Total Revenue	Period-to-date revenue which is the cumulative amount of revenue for the period. This is booked order in the CRM schema for actual revenue.
Response Count	The sum of positive responses for the period.
Cost Per Response	Total approved budget amount for the campaigns for the activity divided by the number of cumulative responses.
Revenue Per Response	The sum of the revenue for that period divided by the number of responses for that period.
Response Lead Count	Total number of leads created against the campaigns during the period. This excludes dead leads.
Cost per Lead	The sum of Period-to-date cost divided by the sum of lead count.
Revenue per Lead	The sum of the revenue for that period divided by the sum of leads for that period.
Order Count	The number of booked orders.
Cost per Order	The total booked order amount divided by the number of orders booked.
Revenue per Order	The sum of the revenue for that period divided by the sum of orders for that period.

Campaign Cost, Revenue, and ROI Report

This report summarizes Costs, Revenues and Return on Investments per Campaign. The following table describes the columns of this report.

Campaign Cost, Revenue, ROI Columns

Column Name	Description
Campaign	Campaign name.
Actual Cost	Summarized schedule costs and its parent object's costs.
Forecasted Cost	From Metrics value. Summarize schedule cost and the parent cost.
Cost Variance	((actual – forecast) / forecast) * 100
Actual Revenue	Booked order amount in Quoting/Order Capture.
Forecasted Revenue	From Metrics value. Summarize schedule revenue and the parent revenue.
Revenue Variance	((actual – forecast) / forecast) * 100
Actual ROI	((actual revenue - actual cost) / actual cost) * 100
Forecasted ROI	((forecast revenue - forecast cost) / forecast cost) * 100
ROI Variance	((actual - forecast) / forecast) * 100

Campaign to Order Report

This report summarizes Order information per Campaign. The following table describes the columns of this report.

Campaign to Order Columns

Column Name	Description
Campaign Name	Campaign name.

Column Name	Description
Total Responses	Sum of responses, collected in Interaction History, based on the aggregate.
Converted to Leads	Sum of responses converted to a lead based on aggregate.
	((open + closed leads) / total responses) * 100
Open Leads	Total number of leads created against the campaigns which are open during the period.
Close Leads	Sum of Leads closed based on aggregate. All closed leads regardless of qualified/unqualified.
Converted to Orders	Sum of Leads converted to orders based on aggregate.
	((total orders of all statuses) / (open + closed leads)) * 100
Orders Booked	The dollar amount of the sum of orders booked based on the aggregate.

Campaigns by Activity Report

This report summarizes Campaign information per Activity. The following table describes the columns of this report.

Campaigns to Activity Columns

Column Name	Description
Activity	Activity name.
Count	This is the number of Campaigns associated to this activity during the period.
Target Audience	The total target audience for this Activity during the period.

Column Name	Description
Lead	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Activities by Campaign Report

This report summarizes activities information per campaign. The following table describes the columns of this report.

Activities by Campaign Columns

Column Name	Description
Campaign	Campaign name.
Active Schedules Count	The number of campaign schedules associated to this campaign during the period.
Active Schedules Total Cost	The total budget amount currently assigned to this campaign.
Target Audience	The number of target group entries (combination of List, Segment, and Employee List) associated with this campaign.
Forecasted Responses	The number of responses forecasted for the campaign.

Column Name	Description
Forecasted Response Rate	(forecasted responses/targeted customers)*100.

Marketing Activities Report

This report summarizes marketing activities information per activity. The following table describes the columns of this report.

Marketing Activities Report Columns

Column Name	Description
Activity	Activity name.
Number of Campaigns	This is the number of campaigns associated to this activity during the period.
Active Schedules Count	The number of campaign schedules associated to this activity during the period
Active Schedules % Change	The percentage increase or decrease in the number of active schedules as compared to the previous period. ((Current schedule count - previous schedule count)/previous schedule count)*100
Active Schedules Total Cost	The total budget amount currently assigned to this activity.
Target Audience Count	The number of target group entries (combination of List, Segment, and Employee List) associated with this Activity Type.
Target Audience % Change	The percentage increase or decrease in the number of target group entries as compared to the previous period. ((Current target audience count - previous target audience count)/previous target audience count)*100

Column Name	Description
Forecasted Responses	The number of responses forecasted for the activity.
Forecasted Response Rate	(forecasted responses/targeted customers)*100

Campaign Budget Amount by Activity Type Report

This report summarizes Budget information per Activity Type. The following table describes the columns of this report.

Campaigns by Budget Amount by Activity Type Columns

Column Name	Description
Campaign Name	Campaign name.
Activity Type	Activity Type name.
Activity	Activity name.
Business Unit	Business Unit name.
Approved Budget Amount	The total budget amount allocated to the Activity by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Activity.

Campaigns by Leads and Opportunities Report

This report summarizes Lead and Opportunity information per Campaign. The following table describes the columns of this report.

Campaigns by Leads and Opportunities Columns

Column Name	Description
Campaign Name	Campaign name.
Targeted Customers	The total target audience for this Activity during the period.
Lead	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Conversion Rates by Sales Group Report

This report summarizes rate of lead conversion to opportunities, quotes and orders by sales group. The following table describes the columns of this report.

Conversion Rates by Sales Group Columns

Column Name	Description
Sales Group	Name of the Sales Group.
Total Count	Sum of total leads corresponds to that sales group during the period.
Opportunities	Total leads converted to opportunities during the period.

Column Name	Description
Quotes	Total leads converted to Quotes during the period.
Lead to Opportunities %	The number of opportunities divided by total leads multiplied by 100.
Opportunities to Quotes %	The number of quotes divided by total opportunities multiplied by 100.
Quotes to Orders %	The number of orders divided by total quotes multiplied by 100.

Event Cost and Revenue Report

This report summarizes Costs and Revenues per event. The following table describes the columns of this report.

Event Cost and Revenue Report Columns

Column Name	Description
Event	Event Name
Total Cost	Period-to-date cost which is the cumulative amount of the approved budget for the period.
Total Revenue	Period-to-date revenue which is the cumulative amount of revenue for the period. This is booked order in the CRM schema for actual revenue.
Registration Count	The sum of registrations for the period.
Cost per Registration	Total approved budget amount for the events for the activity divided by the number of cumulative registrations.

Column Name	Description
Revenue per Registration	The sum of the revenue for that period divided by the sum of registrations for that period.
Lead Count	Total number of leads created against the campaigns during the period, excluding dead leads.
Cost per Lead	The sum of Period-to-date costs divided by the sum of Lead Count.
Revenue per Lead	The sum of the revenue for that period divided by the sum of leads for that period.
Order Count	The number of booked orders.
Cost Per Order	The total booked order amount divided by the numbers of orders booked.
Revenue per Order	The sum of the revenue for that period divided by the sum of orders for that period.

Event Cost, Revenue and ROI Report

This report summarizes Costs, Revenues and Return on Investments per Event. The following table describes the columns of this report.

Event Cost, Revenue and ROI Report Columns

Column Name	Description
Actual Cost	Summarized schedule costs and its parent object's costs.
Forecasted Cost	From Metrics value. Summarize schedule cost and the parent cost.
Cost Variance	((actual – forecast) / forecast) * 100

Column Name	Description
Actual Revenue	Booked order amount in Oracle Quoting.
Forecasted Revenue	From Metrics value. Summarize schedule revenue and the parent revenue.
Revenue Variance	((actual – forecast) / forecast) * 100
Actual ROI	((actual revenue - actual cost) / actual cost) * 100
Forecasted ROI	((forecast revenue - forecast cost) / forecast cost) * 100
ROI Variance	((actual - forecast) / forecast) * 100

Events by Budget Amount Report

This report summarizes Budget information per Event. The following table describes the columns of this report.

Events by Budget Amount Columns

Column Name	Description
Event	Event name.
Type	Event Type name.
Business Unit	Business Unit name.
Approved Budget Amount	The total budget amount allocated to the Event by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Event.

Events by Event Type Report

This report summarizes Budget and Event information per Event Type. The following table describes the columns of this report.

Events by Event Type Columns

Column Type	Description
Event Type	Event Type name.
Number of Events	The number of Events associated with this Event Type.
Approved Budget Amount	The total budget amount allocated to the Event by approved budget lines.
Awaiting Approval Budget Amount	The total budget amount is the combined total amount for Pending and Planned for the Event.
Registrants	The sum number of registrations for this event type for the period.
Attendees	The sum number of attendees for this event type for the period.
Cancellations	The sum number of cancellations for this event type for the period.

Leads by Opportunity Report

This report summarizes Leads and Opportunities information per Event. The following table describes the columns of this report.

Leads by Opportunity Columns

Column Name	Description
Event	Event name.

Column Name	Description
Leads	Total number of leads created against the campaigns during the period, excluding dead leads.
Lead Amount	The sum of Lead amount of all leads created against the campaigns during the period.
Opportunities	Total number of opportunities created against the campaigns during the period.
Opportunity Amount	The sum of opportunity amount of all opportunities created against the campaigns during the period.

Events by Registrants Report

This report summarizes Registration information per Event. The following table describes the columns of this report.

Events by Registrants Columns

Column Name	Description
Event Name	Event name.
Registrants	The sum number of registrations for this event type for the period.
Attendees	The sum number of attendees for this event type for the period.
Cancellations	The sum number of cancellations for this event type for the period.

Invalid Leads by Reason Report

This report summarizes invalid leads by reason. The following table describes the columns of this report.

Invalid Leads by Reason Columns

Column Name	Description
Reason	Reason for failure.
Invalid	Total leads which failed to import during the period.

Lead Aging by Quality Reports

This report summarizes leads by aging by rank. The following table describes the columns of this report.

Leads Aging by Quality Reports Columns

Column Name	Description
Rank	Name of the Sales Rank
0-1	Leads generated from 0 to 1 day from the last refresh date.
2-3	Leads generated between 2 and 3 days from the last refresh date.
3-7	Leads generated between 3 and 7 days from the last refresh date.
8-14	Leads generated between 8 and 14 days from the last refresh date.
15-21	Leads generated between 15 and 21 days from the last refresh date.
22-28	Leads generated between 22 and 28 days from the last refresh date.
29-35	Leads generated between 29 and 35 days from the last refresh date.

Column Name	Description
36-42	Leads generated between 36 and 42 days from the last refresh date.
> 43	Leads generated 43 days and beyond from the last refresh date.
Total	Total leads generated since the last refresh date.

Lead Aging by Sales Group Report

This report summarizes leads by aging by sales group. The following table describes the columns of this report.

Leads Aging by Sales Group Columns

Column Name	Description
Sales Group	Name of the Sales Group.
0-1	Leads generated from 0 to 1 day from the last refresh date.
2-3	Leads generated between 2 and 3 days from the last refresh date.
3-7	Leads generated between 3 and 7 days from the last refresh date.
8-14	Leads generated between 8 and 14 days from the last refresh date.
15-21	Leads generated between 15 and 21 days from the last refresh date.
22-28	Leads generated between 22 and 28 days from the last refresh date.

Column Name	Description
29-35	Leads generated between 29 and 35 days from the last refresh date.
36-42	Leads generated between 36 and 42 days from the last refresh date.
> 43	Leads generated 43 days and beyond from the last refresh date.
Total	Total leads generated since the last refresh date.

Lead Assignment and Conversion by Sales Group Reports

This report summarizes lead assignment and conversion by sales group. The following table describes the columns of this report.

Lead Assignment and Conversion by Sales Group Columns

Column Name	Description
Sales Group	Name of the Sales Group.
Total Count	Sum of total leads corresponds to that sales group during the period.
Changed Count	Total number of assigned leads that are actually updated by sales rep during the period.
Changed %	The number of changed leads divided by assigned leads multiplied by 100.
Unchanged Count	Total leads that are assigned but not updated by sale rep during the period.
Unchanged %	The number of unchanged leads divided by assigned leads multiplied by 100.

Column Name	Description
Open Leads	Total leads in open status during the period.
Dead Leads	Total leads in dead status during the period.
Converted to Opportunities	Total leads converted to opportunities during the period.
Converted to Opportunities %	The number of opportunities divided by total leads multiple by 100.

Lead Import Statistics by Campaign Report

This report summarizes lead import statistics by campaign. The following table describes the columns of this report.

Lead Import Statistics by Campaign Columns

Column Name	Description
Campaign	Name of the campaign.
Added	Total of valid, invalid and new leads.
Valid	Total leads imported successfully during the period.
Invalid	Total lead import failures during the period.
New	Total Leads imported during the period.

Lead Import Statistics by Region Report

This report summarizes lead import statistics by region. The following table describes the columns of this report.

Lead Import Statistics by Region Columns

Column Name	Description
Region	Name of the Region.
Added	Total of valid, invalid and new leads.
Valid	Total leads imported successfully during the period.
Invalid	Total lead import failures during the period.
New	Total Leads imported during the period.

Lead Quality by Campaign Report

This report summarizes leads by rank by campaign. The following table describes the columns of this report.

Lead Quality by Campaign Columns

Column Name	Description
Campaign	Name of the Campaign
First Defined Rank	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	The total of the leads in the remaining ranks.
Total	Total leads by all ranks during the period.

Lead Quality by Region Report

This report summarizes leads by rank by region. The following table describes the columns of this report.

Lead Quality by Region Columns

Column Name	Description
Region	Name of the Region.
First Defined Rank	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	The total of the leads in the remaining ranks
Total	Total leads by all ranks during the period.

Lead Quality by Status Report

This report summarizes leads by rank by status. The following table describes the columns of this report.

Lead Quality by Status Columns

Column Name	Description
Status	Name of the Status
Status Flag	Flag to determine if the status is yes or no.
First Defined Rank	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.

Column Name	Description
Second Defined Rank	N/A
Third Defined Rank	N/A
Others	The total of the leads in the remaining ranks.
Total	Total leads by all ranks during the period.

Lead Sources by Campaign Report

This report summarizes leads by source then by campaign. The following table describes the columns of this report.

Lead Sources by Campaign Columns

Column Name	Description
Campaign	Name of the Campaign.
First Defined Source	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Source.
Second Defined Source	N/A
Third Defined Source	N/A
Others	The total of the leads from the remaining sources.
Total	Total leads by all sources during the period.

Lead Sources by Region Report

This report summarizes leads by source by region. The following table describes the columns of this report.

Lead Sources by Region Columns

Column Name	Description
Region	Name of the Region
First Defined Source	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Source.
Second Defined Source	N/A
Third Defined Source	N/A
Others	The total of the leads from the remaining sources.
Total	Total leads by all sources during the period.

Lead Sources by Status Report

This report summarizes leads by source and then by status. The following table describes the columns of this report.

Lead Sources by Status Report Columns

Column Name	Description
Status	Name of the Status.
Open	Flag top determine if the status is yes or no.
First Defined Source	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Rank.
Second Defined Source	N/A
Third Defined Source	N/A

Column Name	Description
Others	The total of the leads from the remaining sources.
Total	Total leads by all sources during the period.

Lead Status by Campaign Report

This report summarizes leads by status then by campaign. The following table describes the columns of this report.

Lead Status by Campaign Report Columns

Column Name	Description
Campaign	Name of the Campaign.
First Defined Status	The A, B and C columns of this report are defined at: Administration > Marketing > Setup > Code Definition, Object Type Status.
Second Defined Status	N/A
Third Defined Status	N/A
Others	The total of the leads from the remaining statuses.
Total	Total leads by all statuses during the period.

Responses by Activity Report

This report summarizes response information by activity. The following table describes the columns of this report.

Responses by Activity Columns

Column Name	Description
Activity	Activity Name.
Number of Campaigns	Total number of campaigns belonging to that activity during the period.
Target Audience	Total targeted audience for this activity during the period.
Responses Added	Total number of responses added for the activity during the period.
Responses Change	Change from previous to current for the number of responses during the period.
Cost Per Response	Total approved budget amount for the campaigns for the activity divided by the number of cumulative responses during the period.
Responses Forecast	Total number of responses forecasted during the period.
Responses Variance	((Actual - Forecast)/Actual) * 100
Conversion to Lead Count	Total number of responses converted to leads during the period.
Conversion to Lead Change	Change from previous to current for the number of responses converted to leads during the period.
Cost Per Lead	Sum of period-to-date cost divided by total leads during the period.

Responses by Campaign Report

This report summarizes response information by campaign. The following table describes the columns of this report.

Responses by Campaign Columns

Column Name	Description
Campaign	Campaign Name.
Target Audience	Total targeted audience for this campaign during the period.
Responses Added	Total number of responses added for the campaign during the period.
Responses Change	Change from previous to current for the number of responses during the period.
Cost Per Response	Total approved budget amount for the campaigns divided by the number of cumulative responses during the period.
Responses Forecast	Total number of responses forecasted during the period.
Responses Variance	((Actual - Forecast)/Actual) * 100
Conversion to Lead Count	Total number of responses converted to leads during the period.
Conversion to Lead Change	Change from previous to current for the number of responses converted to leads during the period.
Cost Per Lead	Sum of period-to-date cost divided by total leads during the period.

Home Page Charts

In order for the charts to display, your server must be configured as follows:

1. To enable run-time image generation for charts on Unix, specify the X Server used to generate dynamic images. This server does not have to be a dedicated server for Applications; however, it does need to be accessible by the Apache server that calls it. This is done through "xhost +", or through a more secure "xauth" Unix command. A Windows NT Machine running a Unix emulator like Exceed may be used. Note:

This step is not required if you are installing the JTF framework on a Windows-based operating system (Windows NT or Windows 2000). To implement the Display Server identifier, update the <ORAHTTP_TOP>/Jserv/etc/jserv.properties with the following changes:

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

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

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

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

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

The following table contains a list of charts available for display on the Oracle Marketing home page:

Home Page Charts

Chart Name	Description
Budget Utilization by Business Unit	Summarizes the top ten budgets by business unit
Budget Utilization by Category	Summarizes the top ten budgets by category
Campaigns by Leads	Summarizes the top ten campaigns by leads
Campaigns by Opportunity	Summarizes the top ten campaigns by opportunities
Events by Attendance	Summarizes the top ten events by attendance
Events by Leads	Summarizes the top ten events by leads
Events by Registration	-
Lead to Opportunity	-

The following table provides a list and description of the parameters that you can set to view Home page charts. The following table describes the parameters for Home Page charts.

Home Page Charts Parameters

Parameter Name	Description
Region	Lists all Regions defined by geographic area Region (geographic area location 2). User may choose a region or 'All' for all Regions. Default is set to 'All'.
Country	Lists all Countries defined in geographic area Country. User may choose a Country or 'All' for all Countries. Default is set to 'All'.
Business Unit	Lists all business units defined in HR Organizations with type 'BU'. User can choose a business unit or 'All' for all business units. Default is set to 'All'.

Glossary

Activity

Sub-level of Activity Type. For example, below activity type "Advertising," one would find "Advertising" and "e-Advertising."

Activity Purpose

A meaningful objective to drive a marketing activity. All marketing activities (campaign schedules) may be associated with an Activity Purpose. In some cases, Activity Purpose may dictate Target Group selection.

Activity Template

See *Schedule Template*

Activity Type

The types of marketing activities that can be created and defined in Oracle Marketing. For example,

- Advertising

- Direct Marketing

- Events

- Publishing

- PR/AR

- Internal Communications

Actuals

Seen on Cost Types and Metrics in Oracle Marketing and used to enter the actual costs or actual metrics

Administration

A main tab in Oracle Marketing from where a variety of administrative functions can be

performed

Analytics

A group of tools used to predict desired customer behavior by analyzing customers' response to a prior campaign

Approval Rule

Rules created in Oracle Marketing (and also in other parts of the Oracle E-Business Suite), to control the routing and sequence of approval requests. This means users do not manually have to select the correct approver, they simply submit for approval.

Attachment

Electronic document that can be uploaded or linked to Oracle Marketing for later download by other users

Attachment Type

When attachments are added at various levels within Oracle Marketing (for example, Campaigns and Campaign Schedules), the attachment type must be selected. Allowable values are:

- File: Any digitized file that is loaded into Oracle Marketing.

- URL: A URL that points to a file not actually loaded into Oracle Marketing.

Audience

An audience, in marketing terms, is a group of people who can be targeted for a campaign or event. They meet a common criterion, and can be addressed for a specific purpose.

Audience Dashboard

The home page of list managers from where they can create, manage, and analyze the performance of lists

B2B

Business-to-Business

B2C

Business-to-Consumer

BIS

Business Intelligence System. A module in the Oracle E-Business Suite generally used for reporting purposes

Budget

A pool of funds which are drawn upon to pay for campaigns, events, deliverables, offers - essentially any marketing object requiring money. Can be fixed or accrued, based on sales

Budget Adjustment Types

Types of adjustments, such as making available committed funds when a customer fails to perform.

Budget Amount (also Initial Budget Amount)

Currency and value, that is set on the Budget side navigation of an Oracle Marketing object, in the planning phase, as the object is being created.

Budget Source

Source of funds. It could be a budget or campaign in the case of schedules and also a person in specific cases.

Budget Source Value

The amount being requested, or approved, from a Budget Source.

Budget Thresholds

Alerts that can be raised when a budget is being depleted too quickly or too slowly.

Business Rules

The rules and guidelines which govern how an organization uses an Oracle product.

Business Unit

A grouping of users within the application, defining the organizational structure.

Campaign

Campaign is a framework to plan and manage a marketing initiative. It is a collection of marketing activities designed to support a goal.

Campaign Dashboard

The home page for Campaign Workbench users that helps them identify high and low performing campaigns, view schedule GANTT charts, view their recent schedules, and view and drill down a campaign hierarchy.

Campaign Schedule

A marketing activity that will be executed through a specific channel. These executions may include direct marketing, advertising, direct sales, and events.

Categories

Method for grouping like marketing objects

CCM

Concurrent Manager. For example, approvals workflow requests are batched and then handled by concurrent manager programs.

CDS

Core Data Set

Channel

Channel is the mode of delivery for a schedule. Examples could be a campaign activity executed through the following channels: e-mail, fax, print, Web advertisements, and banners.

COGS

Cost of Goods Sold

Collaboration

Collaboration content is material associated with a marketing activity but is not outbound (that is, not sent out to customers). Sales and external teams involved in the marketing activity use it.

Collateral

Collateral is the outbound, promotional message that customers receive. It could be information about the product or marketing activity such as product data sheets, white papers, promotional flyers, newsletters, cover letters, invitations, and so on.

Control Group

A group of list entries whose members are not contacted through a marketing activity. A Control Group can be specified when a Target Group is being created. Members of a Control Group are usually used to run test marketing activities and the responses are compared with the responses from the target records that are actually contacted, to determine the benefits of marketing to customers who meet the list criteria.

Contact Group

A group of list entries whose members are actually contacted through a marketing activity. A Contact Group is obtained by taking the count of associated lists or segments for a target group, subtracting the number of Control Group records from it, and adjusting for any suppression or duplicate records.

Contact Point

A touch point associated with a marketing object that other applications can direct customers to for further information. Example: a person or Web site may be contacted for more information about a product.

Content Item

A specific instance of a content type. A merchant can create any number of content items that belong to a content type. Example: Product is a content type, a laptop computer is a content item.

Content Type

Content types define the structure of the content item through a set of attributes that constitutes the meta-data to ensure content consistency.

In Web Marketing, the content type specifies the type of Web posting. These can be: Product Recommendation, Web Ad, Web Offer.

Cost

Expenditure incurred by marketing and sales activities. Can be paid immediately, or accrued and paid later.

Cost Type

A breakdown of pre-specified cost on each Oracle Marketing object. For example, within a total budget value of $20,000, cost types may be allocated as $10,000 on Mail List Buy and $10,000 on Production/Creative.

CRM

Customer Relationship Management

Custom Setups

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

Customer Master Record(s) (also known as Customer Master Files)

The actual records of customers, prospects, partners, vendors, and so on that are in the Trading Community Architecture stored within the Oracle E-Business Suite. These records are shared across all the modules in the suite.

CSV

A comma delimited data file type

Data Mining

Data Mining is a process used to discover strong, meaningful patterns and relationships in large amounts of data. These patterns and relationships are used to more accurately predict and analyze the behavior of customers and prospects.

Data Sources

Field maps for external data sources

DBA

Database Administrator

Deciles

In data mining, after scoring a target population based on a model, the target population is divided into ten continuous segments called deciles. The deciles are ordered from the highest to the lowest probability of displaying the target behavior. Therefore, the customer records in decile 1 are the most likely to exhibit the target behavior.

Deduplication

To remove duplicate records from a list, the entries are compared based on the deduplication rules specified in the Administration tab. Use of Word Standardization improves the completeness of the deduplication process. (See Word Standardization.)

Deliverables

Deliverables are marketing collateral that you can distribute to customers across multiple channels. Each deliverable is a physical or electronic collateral, which you can associate with a campaign or an event.

Discoverer

Oracle's data query tool

Display Priority

A business attribute of the posting's content type used to prioritize the recommended content for display, based on business objectives. Example: prioritize the recommended products based on price, and display the highest priced product.

DNC

Do Not Contact. A flag in marketing databases and lists indicating people who do not wish to be contacted.

Web Marketing

A group of methodologies used to configure Web sites according to customer

preferences and anticipated interests.

ERP

Enterprise Resource Planning

EUL

End User Layer. The EUL provides the mapping between the database attributes and Oracle Discoverer.

Event

A planning tool to execute a marketing activity, such as a trade show, seminar, webinar, or product launch.

Event Promotion

A specific type of Campaign that may be created in Oracle Marketing to promote an Event. It will contain a Campaign Schedule, detailing the executions, and will be linked to the Event.

Event Schedule

An event schedule is a marketing activity executed in one or more venues for an audience.

Fatigue Rules

Rules that prevent marketing teams from over contacting their customer or prospects base. Customers or prospects who have been contacted the specified number of times are removed from the target group of a marketing activity.

Geography

A side navigation link in Oracle Marketing that allows users to define the geographical area (country, region, sub region, state, and city) in which an Oracle Marketing object will be executed.

GUI

Graphical User Interface

Import

A link in the Shortcuts bin of the Audience Dashboard, giving access to the List Import functionality

Initial Budget Amount

See Budget Amount

Interaction

Any interaction (or touch point) with a customer or prospect. For example, contacts may be targeted, and they may respond, register, attend, and evaluate (dependent upon the activity type). Interactions may later be qualified and rated, and may become leads.

Interaction Import

A functionality in Oracle TeleSales that will allow interactions and/or new customer/prospect records to be imported from pre-defined format flat files into customer master records.

Intersect

A value used in List Build and Selection. Use this option to create a selection that includes only the intersect (overlap) of two chosen lists.

***i*Store**

An Oracle product designed for producing electronic commerce Web sites.

JSP

Java Server Page

JTF

Java Technical Foundation

Landing Page URL

A Landing Page URL is a simple and easy-to-remember URL that marketers can define to track responses for Advertising, Fax, and Direct Mail - Print campaign schedules. When end users type in the Landing Page URL in a browser, the associated tracking URL navigates them to the relevant Web page.

Lead

A qualified sales opportunity that results from a marketing or sales activity.

Lists

A list is a group of customers or prospects that meet a specific user-defined criteria. A list is always static.

List Import

A function in which external data, such as a rented or purchased list, may be permanently or temporarily added to an organization's internal customer and prospect data.

List Import Table

A database table where records imported from a rented or purchased list are stored. Records to TCA from the List Import Table.

List Templates

Consist of a set of query criteria and data filters and are used to create lists based on associated Data Sources.

Locking Rules

Determine which fields of particular attributes of a marketing object are locked from update once they are created.

LOV

List of Values

Mandatory Rules

Determine which fields belonging to a marketing object are required.

Marketing Mediums

Execution channels, such as radio, newspaper, television, or billboards through which marketing campaigns are conducted.

Marketing Object

See *Object*.

Marketing Response

A contact made by a customer or a prospective customer with a vendor as a result of some marketing activity initiated by the vendor.

Merchandising Strategy

An algorithm used to select personalized content items (including products, offers, ads, product reviews) for display on a web site.

MES

Marketing Encyclopedia System, a module in the Oracle E-Business Suite

Messages

Messages are associated with a program or campaign and they are used to distinguish and position a product.

Metrics

Metrics are measurements for forecasting and tracking the effectiveness of marketing activities. You can associate cost, revenue, or other metrics with many marketing objects.

MLS

Multi-lingual Support

MRP

Manufacturing Resource Planning, a module in the Oracle E-Business Suite

Multi Org

Used to describe the capabilities of the Oracle E-Business Suite in dealing with multiple organizations/languages/currencies, and so on.

Natural Language Query

A template that enables the selection criteria for generating a list to be defined just as you would think them in a natural language.

Note Type

Allows users to classify "Notes" created in Oracle Marketing by their type.

Object

Oracle Marketing uses the term "object" to refer to various building blocks used in the application. These include:

- Programs

- Campaigns

- Campaign Schedules

- Events

- Event Schedules

- One-Off Events

- Deliverables

- Products

- Offers

- Budgets

OC or OM

Order Capture or Order Management, a part of the Oracle E-Business Suite allowing orders to be created and passed for fulfillment.

Offer

An offer is an incentive designed to entice customers to purchase a product or service.

One-Off Event

An "event" type object in Oracle Marketing, used to define an event taking place once, in one location only. This allows the user to create an event schedule, without first having to create an event (or a Campaign) plus a schedule.

Opportunity

A sales opportunity, created in Oracle Field Sales, Oracle Telesales, and other sales applications.

Oracle Advanced Outbound

A product used to preprocess marketing campaigns for Oracle TeleSales.

Organization

A company (or other logical grouping of contacts) in TCA

Owner

The name of the person within Oracle who owns or is responsible for the Oracle Marketing object.

Page

A logical entity describing a JSP template or an HTML or OA page. In Web Marketing, Page identifies a placement.

Personalize

A function that allows an Oracle Marketing user to personalize many screens, to produce a listing of chosen columns only, and/or to select filtered or specific data only.

PHP

Personal Home Page.

Placement

An object representing a location on a Web site for displaying content when a Web schedule executes.

Web Posting

A web posting is an object that holds the content type, content selection, and display strategy in Web Marketing. There are two types of web postings: universal and rule-based.

Product

A main tab in Oracle Marketing, giving access to create and manage products, product hierarchies, and product pricing in the Oracle E-Business Suite.

Product Family

A value in several pick lists, giving a choice of products. Messages, campaigns, events, and deliverables may all be associated with specific product families.

Program

Program is an umbrella object used to combine different marketing objects such as campaigns and events, under one entity. Costs, revenues, and metrics of the program components are rolled up and reported at the program level.

Related Products

Related products are user-defined links between different products. You can associate an unlimited number of product relations. Related products are used by various Oracle applications. For example, a call center agent using Oracle TeleSales can use related products to identify cross-sell or up-sell opportunities and prerequisites.

Response

A response can be any communication back from a customer or prospect. After qualification, a response can become a lead. A response that cannot be qualified as a lead can be further targeted with lead maturation programs.

ROI

Return on Investment.

Rollup Cost

A cost metric that is composed of, or calculated as a sum of, other cost metrics. A rollup cost receives its values from lower level marketing object costs.

Rollup Metric

A metric that is composed of, or calculated as a sum of, other metrics. A rollup metric receives its values from lower level marketing objects.

Rule

A set of conditional statements, merchandising strategy, and a rule priority. The

merchandising strategy is triggered if all conditional statements are true.

Rule-based Posting

A rule-based posting consists of several rules. Use it to apply different merchandising strategies to different situations as described by the rules conditions.

Schedule Template

Includes information on what is needed to plan and execute a campaign. A specific outbound channel and a specific schedule purpose are associated with a Schedule Template.

Scripts

Scripts provide marketing managers with the ability to follow up on the campaigns with a scripted flow of interactions (either through the Web or a call center). They are used to establish an interactive, personalized conversation with customers.

Segment

Segments are customers that satisfy a specific set of business rules, or selection criteria. Examples could be profitable or non-profitable customers. A segment is dynamic.

SIC

Standard Industrial Classification.

Source Code

The unique code number assigned to each Campaign, Campaign Schedule, Event or Event Schedule within Oracle Marketing. Source Codes are associated with all interactions, and are used in Oracle Leads Management

SQL

Structured Query Language

Status

Seen in many places within Oracle Marketing, the Status field shows where the campaign, event, schedule, deliverable is in the approvals process. Actual values within the pick list vary dependent upon the object.

Style

Styles define the look and feel for content items that are displayed in a Web site placement. Styles are associated with an XSL stylesheet that converts the XML output of the eMerchandising engine into HTML.

Suppression Lists

List of entries used to automatically exclude them from a specific marketing activity. Suppression filters are predefined and applied to all target lists to comply with privacy policies when customers choose to opt out of campaigns and do not wish to be targeted. User-defined filters can also be created and applied globally to all campaigns or to specified campaigns.

Target Accounts

A target account for a campaign or event schedule is the set of people who will be informed about an activity and invited to participate in it. They make up the audience for the schedule.

Targeting Conditions

Conditional statements used to target merchandising strategies to specific users. Targeting conditions may be based on the type of visitor, shopping cart total amount and belonging of a visitor to a segment or a list.

Trading Community Architecture (TCA)

The Oracle customer model (or schema), that serves as a single repository for all data about organizations, customers, contacts, partners, vendors, and relationships.

Triggers

Triggers are used to activate a campaign schedule on a condition or date-based monitor.

Teams

Marketing teams are associated with marketing objects (Campaigns, Events, Deliverables, and so on) and represent users or a group of users with access privileges to these objects. Marketing team members can have full access (read/write) either with or without the ability to Edit Metrics (Budgets, Costs and Revenues, and Metrics) for the marketing object

UI

User Interface

Universal Posting

The content that will be rendered as a Web Ad, Offer, or Product Recommendation using the same merchandising strategy to all the online visitors; however, the strategy may return different personalized content to different visitors.

UOM

Unit of Measure

URL

Universal Resource Locator

VAD

Value Added Distributor

Venue

A specific location that is generally associated with an event

Web ADI

Web Application Desktop Integrator or Web ADI is a tool that brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. Oracle Marketing uses Web ADI to enable marketers to mass create and update Campaign Workbench schedules.

Word Replacement Rules

Rules that govern the comparison of entries during list import to determine whether a duplicate entry is being imported

Word Standardization *(sometimes referred to as Word Replacement)*

In order to successfully deduplicate a list, words such as street identifiers (Avenue = Ave), first names (William = Bill), and States (California = CA) will be temporarily standardized for the purposes of comparison. The use of Word Standardization does not change the text of the actual records. Names of organizations may similarly be temporarily standardized.

Workbook

A term used in Discoverer. A workbook represents selection criteria that will be applied against records in the database.

Workflow

Oracle Workflow is a product used to track and relay approvals and notifications according to business rules.

Worksheet

A spreadsheet of customers or prospects, or both, extracted from a database by Oracle Discoverer.

YOY

Year over Year / Year on Year.

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