



SIEBEL⁷
eBusiness

SIEBEL MARKETING GUIDE

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Introduction

This guide is intended for Siebel Marketing and Siebel Campaigns administrators, managers, and end users with different levels of expertise in customer relationship and database management. Depending on your implementation strategy, administrator duties may be assumed by end users who have advanced expertise in this area.

Although job titles and duties at your company may differ, this book will be useful primarily to people whose title or job description matches one of the following:

Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Marketing and Campaigns Administrators	Persons responsible for setting up and maintaining access to marketing data. Duties include managing databases of customer information, mapping to tables and fields, designing metrics for use in segmentation and filters, creating hierarchies of data, and so on.
Analytics Administrators	Persons responsible for creating and maintaining Siebel Analytics repositories and administering the Siebel Analytics Server environment.
Marketing and Campaigns Managers	Persons responsible for setting up and maintaining a marketing department. Duties include designing and managing campaigns, product marketing information, and product distribution lists.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications.
Siebel Marketing and Campaigns End Users	Persons responsible for implementing campaign strategy by generating snapshots and lists and launching campaigns.

Special skills or knowledge you might need to use this guide with Siebel Marketing and Siebel Campaigns are in the following list:

- **Database Administrators.** SQL and RDBMS design and performance practices.
- **Siebel Application Administrators.** Be familiar with core Siebel architecture, tools, and frameworks.
- **Siebel Application Developers.** Be familiar with core Siebel architecture, tools, and frameworks. Some of the relevant tools to understand include Siebel EAI and Siebel Workflow/Business Process Designer.
- **Marketing and Campaigns Managers and End Users.** May want to be familiar with the basics of HTML for working with Web and email offers.

How This Guide Is Organized

Most chapters of this guide document key tasks and commonly used screens based upon a job role.

This book focuses on tasks commonly performed by marketing and campaigns administrators or those with a familiarity with database tables and fields. Initialization and data mapping tasks are typically performed once, with modifications dependant on changes in data sources and marketing and campaigns strategy.

Revision History

Siebel Marketing Guide, Version 7.5, Rev. A

January 2003 Bookshelf

Table 1. Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
“Adding a Position to the Marketing Administrators Access Group.”	Added this topic.
“Verifying Database Page Size Parameter (DB2 Only).”	Added information for setting up DB2 on the IBM 390 platform.
“Adjusting the Max EAI Records Parameter.”	Revised to explain what happens when you increase and decrease the value of this parameter.
“About Server Definitions.”	Revised the Marketing Repository definition to clarify what tasks this server performs.
“Using Start Point Joins.”	Revised definition to clarify why you need to define start point joins.
“Designing Marketing Program Plans.”	Changed chapter title from Designing Marketing Programs.
“Creating an Attribute Family From the Siebel Database Campaign History.”	Added this topic.
“Planning and Budgeting for Marketing.”	Changed chapter title from Marketing Plans.
“Generating and Maintaining Snapshot Files.”	Changed chapter title from Generating Snapshots and added more overview material.
“Stopping a Snapshot File Generation.”	Added this topic.
“Deleting a Snapshot File.”	Added this topic.
“Setting Up and Using eMarketing.”	Changed the title of this chapter to reflect the addition of setup topics.
“About the Siebel eMarketing Web Site.”	Added this topic.
“Using the eMarketing Offers Page.”	Added this topic.

Table 1. Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
“Using the eMarketing Information Page.”	Added this topic.
“Setting Up Siebel eMarketing.”	Added setup task topics to the eMarketing chapter.

Additional Changes:

- Changed Dun & Bradstreet to D&B throughout the book.
- Changed the name of the Start Schedule button to Activate Schedule.

Introduction

Revision History

Siebel Marketing provides an integrated, closed-loop solution that supports campaign design, campaign management, and campaign launching at each customer touch point.

Siebel Marketing provides tools that you can use to design campaigns, create reusable offers, and segment customers and prospects based on multilevel profile information. It also allows you to execute targeted direct and indirect multistage programs across telemarketing, field sales, field service, mail, fax, and Internet channels. Customer response information, including clickstream data, can be captured for campaign measurement, analysis, and refinement.

In addition, you can support ongoing, interactive communications with customers through Web surveys and eNewsletters to strengthen relationships and build customer loyalty.

This chapter provides the following information:

- [Marketing Features on page 24](#)
- [Terms Used in Siebel Marketing on page 30](#)

Marketing Features

This section contains descriptions of the following Siebel Marketing features:

- [Multistage, Event-Triggered Program Flow Designer on page 24](#)
- [Customer Metrics for Flexible Segmentation on page 25](#)
- [Direct External Data Access for Segmentation on page 25](#)
- [Segment Deduplication and Suppression Filters on page 26](#)
- [Visual Segmentation on page 26](#)
- [Flexible Customer Hierarchy on page 26](#)
- [List Creation and Export on page 27](#)
- [Source Code Formatting on page 27](#)
- [Marketing Server Engine on page 27](#)
- [Organizational and Analytic Features on page 27](#)
- [Launching Campaigns Across Marketing Channels on page 28](#)
- [Marketing Manager for Partners on page 29](#)

Multistage, Event-Triggered Program Flow Designer

Using Siebel Marketing's graphical drag-and-drop Program Flow view or the Program Explorer view, you can design and execute multistage, triggered, and recurring marketing programs. The Program Flow view allows you to visually plan (and execute, if desired) the entire process sequence for each marketing program using new or existing segments, lists, and campaigns. The Program Flow designer also allows you to create the links between steps in a multistage customer dialogue, providing analysis and understanding of marketing results.

You can establish multiple stages for a marketing program using the flexible program definition feature. Each stage can have multiple segments, campaigns, offers, and waves. Subsequent stages can be based on customer response behavior or any other event. For instance, a premium customer visiting the products catalog might trigger an email offer to that customer for the selected product. Upon purchase, a telemarketing campaign might target that customer, offering a special promotion on a complementary product or service.

The graphical Program Flow designer is integrated with Siebel's workflow engine and marketing server. Therefore, once defined, the entire program can be automated from the initial customer segmentation through communication, to response collection and analysis. This capability is especially useful when programs are set to automatically recur, as in the case of a monthly welcome package campaign to new customers.

Customer Metrics for Flexible Segmentation

As a marketer, you continually develop new segment criteria to target specific segments. Sometimes this information is maintained in the data warehouse, but, more often, it needs to be derived. Siebel Marketing allows you to define measures based on complex mathematical scores, ratios, and formulas that can be used to refine segment definition criteria. This provides much greater flexibility for the marketer, bypassing the typical scenario of requiring a database administrator to add new fields or otherwise modify the Siebel database itself. Defined segments can be used with multiple programs and campaigns.

Direct External Data Access for Segmentation

Segments can be created based on data that resides in the Siebel eBusiness Applications suite or other external data sources—using existing relational data warehouse structures. Once a data dictionary describing external data sources has been defined, you can create segment definitions and link those segments to one or more campaigns. Customers sourced from external systems are automatically added as new contact records in the Siebel database, when they are included in campaigns.

Segment Deduplication and Suppression Filters

Customers can be allocated from multiple segments in a program to various campaigns for testing purposes, based on absolute numbers or percentages. Segment prioritization and deduplication help to make sure that customers meeting the criteria for more than one segment will not receive conflicting messages from more than one campaign. Siebel Marketing also includes suppression filters that allow designers to exclude segment members from a marketing program based on predefined rules.

Visual Segmentation

Visual Segmentation allows you to create Siebel Marketing segments using a interactive designer tool in the Answers screen. Using this method allows you to build segment criteria without having to write complex expressions.

In the Answer screen, you choose subject areas, select segment criteria based on fields, and define filters for fields based on your business needs. When you are satisfied with the results, you create the Siebel Marketing segment, name it, and assign a customer hierarchy and targeting level.

Flexible Customer Hierarchy

Customer Hierarchies allow you to design segmentation and filter criteria that take advantage of the relationships between individuals or organizations within the customer base. For example, a campaign can target individuals, or a household of several individuals, or target a business at a central office, regional division, or branch office.

Using Siebel Marketing you can define hierarchies consisting of multiple targeting levels, and then choose the most effective targeting level in the hierarchy when delivering campaign offers. By choosing the appropriate customer hierarchy, you can make sure a single, consistent offer is presented to the customer.

List Creation and Export

Using Siebel Marketing you can create output lists of contacts for export to a fulfillment partner or another application. Direct mail vendors often require specific formatting of campaign lists. When a campaign is ready for launching, the target list may be exported according to a flexible list format, and distributed using FTP or email. You can define, manage, and preview the list format without the intervention of a system or marketing administrator. Default formats may be assigned for each vendor.

Source Code Formatting

Siebel Marketing has flexible source code capabilities for use with exported lists, allowing proper campaign tracking and reporting. The source code format can include encoded information about each customer or prospect based on any database field, whether real or derived. You can also define and maintain multiple formats for use in different campaign scenarios. After you launch the campaign, the source codes assigned to each customer can be captured as part of the response and decoded for closed-loop tracking.

Marketing Server Engine

The Siebel Marketing architecture has been engineered around a high-performance server engine specifically designed to handle large business-to-business and business-to-consumer marketing environments. This engine allows you to query millions of transactions in a single pass of the source relational databases that supply your target segment data. The Siebel Server extracts, transforms, and aggregates customer data in memory before writing the data to a campaign load (snapshot) file. The Siebel Server provides you with the campaign performance you need and the opportunity to iterate various campaign strategies before executing the campaign.

Organizational and Analytic Features

Using campaign forecasting, you can design scenarios based on real or hypothetical financial information that model the performance of campaigns.

You can track program and campaign operations and plans, using the Activity Plan, Explorer, and Campaigns views.

Siebel Marketing users can also use Siebel Analytics tools to analyze program and campaign performance, and generate reports.

Launching Campaigns Across Marketing Channels

Siebel Marketing supports launching campaigns across channels, including the following:

- **Direct mail.** Customized mailers designed for a particular customer or customers.

A mailer can contain any kind of printed content, for example, call-back numbers for telephone responses or a business-reply postcard. The offer can also contain a specific offer number so that each response is tied to a particular contact or prospect.

- **Telemarketing and field sales.** Contacts or prospects who meet certain demographic or other criteria can be passed to other Siebel applications, such as Siebel Call Center or Siebel Sales to perform telephone campaigns. Campaign lists can also be routed to the mobile client for use by Field Sales.

- **Partner and channel marketing.** Campaigns can be managed in coordination with partners, resellers, and distributors using the PRM Partner Portal. Partners can participate with you in campaigns in many ways, including providing and reviewing contact names, viewing collateral, and engaging directly with end customers.

- **Fax campaigns.** Lists of contact fax numbers that can be used to notify customers about special offers.

- **Internet campaigns.** Siebel Marketing supports launching campaigns using the Internet.

You use Internet campaigns for specific products or services to allow you to determine campaign success by tracking responses. The Internet campaign does this by giving each contact a unique response URL. Contacts respond by clicking the URL, clicking a designated link on the Web page, or sending email to a designated address. Siebel Marketing tracks the contacts who respond to an offer and how they responded.

Internet campaigns use the following channels:

- Personalized email with embedded URLs that link to Web offers and surveys designed for each particular customer or group of customers.
- Stand-alone Web pages that display when a particular customer or group of customers logs on to your Web site.
- eNewsletters with various sections or articles personalized for specific contacts or groups of contacts.

An eNewsletter template can consist of multiple sections. Each section has a set of rules that determines who is qualified to receive that section in his or her individual newsletter. When the newsletter is sent out, the Siebel Marketing Server looks at each rule set as it assembles the newsletter sent to each contact. If that contact meets the rule for a section, the section is included in the contact's email. Otherwise, that section is left out.

Marketing Manager for Partners

Siebel Marketing and Siebel Campaigns provides marketing and campaigns managers with enhanced capabilities for working with partners on specific marketing activities and overall marketing collaboration. Siebel Marketing assists marketers in developing and executing marketing plans, while working with partners throughout the process.

The Marketing Manager for Partners module allows you to distribute marketing programs and campaign details through the Siebel Partner Portal. This module allows marketers to coordinate efforts across partners and allow partners to take a more active role in campaign execution. It also allows partner organizations to create, manage, and execute programs and campaigns. Partners can contribute to the marketing process through the same set of views and functionality available in the employee application. However, partners are not able to edit segments or use the program flow due to limitations of the Partner Portal. For more information, see *Siebel Partner Relationship Management Administration Guide*.

Terms Used in Siebel Marketing

You can use Siebel Marketing and Siebel Campaigns to design multistage marketing programs that promote a product or service to specific groups of people. Your campaign plans can include reusable offers that you will send or present to your target recipients.

[Table 2](#) lists some of the terms used frequently in Siebel Marketing and Siebel Campaigns.

Table 2. Siebel Marketing and Siebel Campaigns Terms

Element	Definition
Allocation	The process of specifying how many customers and prospects should be assigned to each campaign and wave within a program stage. You use allocation to divide a segment into subsets of people that you assign to campaign offers. Members of many segments may be assigned to a single campaign, or members of one segment may be assigned to multiple campaigns.
Campaign	One instance of an executed campaign plan. A campaign is one or more offers presented to a group of individuals to foster the relationship between the company and the individual. A campaign may offer a special deal on a new product, may promote accessories or options for a previous purchase, or may follow up on an offer delivered in a previous step of the customer dialogue. Prior to the 7.5 release, this was called a campaign occurrence.
Campaign Plan	A template for a campaign that can be applied any number of times for a launch. Prior to the 7.5 release, this was called a campaign in the Siebel Marketing application.
Filter	A set of criteria intended to exclude specified customers or prospects from a marketing program.
Forecast	Forecasts are financial predictions developed for each campaign plan. Forecast results are derived from a set of segments, lists, response rates, cost inputs, and revenue. Forecasts are also aggregated to programs and marketing plans to allow higher level analysis. Prior to the 7.5 release, this was called Financial Modeler.

Table 2. Siebel Marketing and Siebel Campaigns Terms

Element	Definition
Load Campaign	The process of physically assigning customers or prospects to a campaign by creating records within the Siebel database campaign tables. Prior to the 7.5 release, this was called Campaign Population.
Marketing Plan	A high-level business plan combining any number of programs, events, and stand-alone campaigns.
Offer	A marketing message in a campaign intended for the targeted customers. It can contain information about products, services, prices, or any other information.
Output File Layouts	Determines the information that appears in a generated list of contacts. The output file layout might be as complex as a full mailing address, or as uncomplicated as an email address.
Output Lists	Contain the names and contact information for individuals that qualified for each campaign. Lists are generated from information gathered when you generate a snapshot. The contents of the list are defined by the output file layout assigned to the list.
Program	An instance of an executed program plan. A marketing program is a collection of campaigns that target multiple segments over multiple stages. It contains segments, campaigns, and lists with a similar theme, goal, or economic purpose. A program can have multiple segments, each with multiple campaigns and offers. Prior to the 7.5 release, this was called a Program Occurrence.
Program Plan	A template for a Program that can be applied any number of times for execution. Prior to the 7.5 release, this was called a Program.
Response	The customer or prospect's reaction to a specific offer as part of a specific campaign. May be a positive such as Respondent Purchased or a negative response such as Not Interested.
Results	The actual results of a marketing campaign based on customer counts, response rates, revenues, and expenses.
Segment	A set of target customers or prospects for a given marketing program. Typically defined as a set of selection criteria that can be reapplied to a source database.

Table 2. Siebel Marketing and Siebel Campaigns Terms

Element	Definition
Snapshot	A binary file that collects the information necessary to support the segments, output lists, source code formats, and campaign load mappings for a marketing program. Siebel Marketing builds the snapshot by querying your source database, and obtaining the counts for each segment before allocating segments to campaigns and offers.
Source Codes	An alphanumeric value assigned to each campaign contact and prospect for tracking purposes. The source code format is defined by source code components from the program, segment, campaign, or wave in which the campaign contact was targeted.
Stage Plan	Each program plan may have multiple stage plans, which define the steps in a customer dialogue and define how responses are managed.
Suppressions	Records that should be excluded from a campaign, such as customers with Do Not Solicit flags.
Wave	Waves separate a campaign contact list into sections divided by time or vendor. For example, a campaign might be distributed into multiple waves to avoid overloading an inbound call centers. Some companies launch a campaign with a small wave, around 5% of the entire distribution, to check that their processes (outbound mailing, order entry, order delivery, response tracking, and so on) are working as expected.

Initializing Siebel Marketing

2

After installation is complete, your database administrator or marketing administrator needs to verify that basic initialization tasks have been performed before using Siebel Marketing. This chapter contains information about these tasks in the [“Siebel Marketing Initialization Checklist”](#) on page 34.

Siebel Marketing Initialization Checklist

You must perform several tasks before using Siebel Marketing to create single stage and multistage programs. Therefore, before using Siebel Marketing, complete the tasks in the following list in the sequence shown:

- 1 Gateway Server and Siebel Server.** Verify that the Siebel Gateway Server and the Siebel Server are running before you begin initialization.
- 2 Define data source names.** Create ODBC data source names for each data source used in Siebel Marketing using [“Defining Data Source Names” on page 35](#).
- 3 Make sure Siebel Marketing Server components are enabled.** See [“Enabling Marketing Server Components” on page 35](#).

NOTE: Your system administrator configures server components when setting up Siebel Communications Server. For information about this process, see *Siebel Communications Server Administration Guide*.

- 4 Create a user name that uses the database tableowner login.** See [“Verifying Create Table Privileges for the User Name Parameter” on page 38](#).
- 5 Stop and restart the Siebel Server.** See [“Stopping and Restarting the Siebel Server” on page 38](#).
- 6 Verify the Page Size Parameter for DB2.** See [“Verifying Database Page Size Parameter \(DB2 Only\)” on page 38](#).
- 7 Create the Repository server.** See [“Creating the Marketing Repository Server Definition” on page 39](#).
- 8 Verify the Wave Batch Size parameter.** [“Configuring Wave Batch Size Parameter” on page 39](#).
- 9 Verify the Max EAI Records parameter.** See [“Adjusting the Max EAI Records Parameter” on page 40](#).
- 10 Initialize multistage programs.** Set up the tables and joins to initialize multistage programs using [“Initializing Multistage Programs” on page 41](#).

- 11 Set up Analytic Adapter Components.** For instructions, see [“Setting Up Analytic Adapters”](#) on page 68.
- 12 Revise and activate workflow processes.** See [“Activating Workflow Processes”](#) on page 44.
- 13 Enable auto-response creation in specified screens.** For details, see [“Enabling Automatic Response for Opportunities and Orders”](#) on page 45.
- 14 Set up users who launch campaigns, start a schedule, or reschedule a stage.** For more information, see [“Adding a Position to the Marketing Administrators Access Group”](#) on page 46.

Defining Data Source Names

Define ODBC (Open Database Connectivity) data source names (DSNs) for each data source that contains information you need for Siebel Marketing programs. Also define an ODBC DSN for the marketing repository. The marketing repository is a group of administrative tables in the Siebel application transactional database used by the Siebel Marketing application.

NOTE: If Siebel Analytics is installed, you must create a DSN for the for the Siebel Data Warehouse in addition to the marketing repository. If you use DB2, the ODBC data source name must be the same as the database name. The Marketing Server requires a system DSN, not a user DSN.

Each time you add a data source, you need to repeat this task, creating a DSN that points to the new data source. Prior to implementation, confer with your Technical Account Manager or Technical Support team for the latest list of supported ODBC drivers.

Enabling Marketing Server Components

During Siebel Server installation and configuration, you can set up a number of server component groups used by Siebel Marketing. If you did not set up the components during installation, you can accomplish this task using the following procedure. For more information about enabling component groups, see the Siebel Server installation guide written for your operating system.

Check the status of the Marketing Server component groups, making sure they are enabled using the Component Groups view in the Server Administration screen. The Component Groups view is a list of installed Siebel Enterprise Server component groups and associated components, servers, and tasks.

[Table 3](#) contains a list of Siebel Marketing component groups and components.

Table 3. Marketing Component Groups and Components

Group Name	Full Name	Description	Components
MktgOM	Marketing Object Manager	Marketing Object Manager components	<ul style="list-style-type: none">■ Marketing Obj Mgr■ eMarketing Obj Mgr■ eEvents Obj Mgr
MktgSrv	Marketing Server	Marketing Server components	<ul style="list-style-type: none">■ Data Dictionary Manager■ Marketing Server■ List Import Service Manager

For a list of component groups that should be enabled for Siebel Marketing, see [“To locate and verify component group status” on page 36](#).

Determining Component Group Status

Use the following procedure to make sure component groups are enabled. Enabled component groups must be assigned only to the Siebel Server running Marketing tasks, except for the List Import Service Manager which can be enabled on multiple Siebel Servers. The server assigned to the selected component group appears in the Servers view tab list.

To locate and verify component group status

- 1 From the application-level menu, choose View > Site Map > Server Administration > Component Groups.

- 2** In the Enterprise Component Groups list, locate each component group, and make sure the group's Enable State is Enabled.

The following groups should be enabled:

- Marketing Object Manager
- Marketing Server
- Workflow Management
- Communications Management
- System Management
- Enterprise Application Integration (eAI)
- Assignment Manager (Needed if you will use Assignment Manager to automatically assign the organization owner and position owner based on specific criteria in predefined rules.) For more information, see [“Setting Up Campaign Execution Options” on page 339](#).

Enabling and Synchronizing Component Groups

If the component group is not enabled, use the following procedure to enable it. When the component groups are enabled, synchronize the component groups.

To enable component groups

- 1** From the application-level menu, choose View > Site Map > Server Administration screen > Enterprise Configuration.
- 2** In the Enterprise Component Groups list, select the component group, click the menu button, and choose Enable Component Group.

To synchronize component groups

- 1** From the application-level menu, choose View > Site Map > Server Administration screen > Enterprise Configuration.
- 2** Click the Batch Component Admin view tab.
- 3** In the Batch Components list, click Synchronize.

You do not have to select any components in this view. The synchronization task may take a few minutes.

Verifying Create Table Privileges for the User Name Parameter

When accessing the Siebel database, the Marketing application uses a specific user name to gain access internally. To make sure that the Marketing Server processes will be completed successfully, you need to create a user name that uses the database tableowner login, and then start the Enterprise Server with this login. You specify the Enterprise User Name parameter during Siebel Server installation. This user name must have Create Table privileges in the Siebel tableowner schema because the server programs use the Enterprise server's User Name parameter to create tables in the Siebel database.

In addition, this user (tableowner) must have the same responsibilities and positions as the system administrator (SADMIN). Responsibilities and privileges are assigned by a Siebel system administrator from within the Siebel Application.

Stopping and Restarting the Siebel Server

The Siebel Server must be restarted each time synchronization occurs.

NOTE: You cannot Resume or Restart more than once for the same set of requests.

To restart the Siebel Server process using Microsoft Windows

- 1** In the Microsoft Windows' Control Panel, click the Services icon to open the Services window.
- 2** Locate Siebel Server and click Stop.
- 3** Click Start.

Verifying Database Page Size Parameter (DB2 Only)

If you use an IBM DB2 database on any other hardware platform, it is recommended that you set the database parameter named Page Size (bytes) for the Siebel Database tablespace to a minimum of 16384. Setting this parameter to 16384 improves performance.

For more information, contact your system administrator and see *Siebel Data Warehouse Installation and Administration Guide*.

Creating the Marketing Repository Server Definition

The Marketing Repository consists of a set of system tables in the Siebel database. As a result, the Marketing Repository shares the same system DSN as the main Siebel database.

You need to create a Marketing Repository server definition that points to the Marketing Repository database, using the tableowner's (Marketing Repository) user name and password. This server definition is used by the Marketing component group to connect to the database. For instructions, see [“Creating Server Definitions” on page 79](#).

NOTE: When you create the Marketing Repository server definition, make sure the Type field is set to Marketing Repository, not Data Source.

Although only one Marketing Repository record can be created, the values for reference name, DSN, user name, and password can be updated at any time.

Configuring Wave Batch Size Parameter

Certain Communication Server parameters and Marketing Server component parameters affect the performance of eMarketing campaigns. The first of these parameters is the Wave Batch Size parameter in the Marketing Server component. This parameter effectively, but not directly, specifies the number of communication server requests that will be spawned for every wave. If the number of people in a wave is 1000 and the Wave Batch Size is set to 50, then 20 communication server requests are spawned. Depending on the SMTP server being used, a higher number of communication server requests can speed up the execution of the eMarketing campaign. The Max Tasks parameter in the communication server component however sets the limit on the number of such requests that can be spawned at one time. For details about setting up Communication Server parameters, see *Siebel Communications Server Administration Guide*.

Adjusting the Max EAI Records Parameter

During the campaign load process, text files containing information about the contacts and prospects for the campaign are created in the [Siebel File System]\Marketing\EAI directory. These files are used to check for records in the Siebel Contacts table (S_CONTACT) and create new records prior to populating the Marketing external key table (S_DD_USER_KEY) and the Campaign Contacts table (S_CAMP_CON).

The size of these files is controlled by the MAX EAI Records parameter in the Marketing Server component. By default, the system creates one file for every 10,000 contacts. When 10,000 contacts have been read into a file the file is saved (committed).

Adjusting the MAX EAI Records parameter is not needed to run the marketing application. However, you may need to increase or decrease the value of this parameter based on your business needs.

Reducing the Max EAI Records parameter. Loading a campaign is an all-or-none process because the commit occurs only after the campaign load process completes successfully. If record 10,000 fails during a campaign load, the previous 9,999 records that were inserted will not be saved in a file. Siebel Marketing does not support partial commits and there is no way to restart the process. However, you can reduce the number of records that load for each commit by decreasing the Max EAI Records parameter from its default of 10,000. You set the Max EAI Records parameter on the Marketing Server (MktgSrvr) component. Reducing the Max EAI Records can also help prevent a time out from causing a load to fail.

To clean up records from an earlier EAI load, you can use EIM to delete the old records. If a campaign load fails, an administrator uses EIM to back out of the committed records in the EIM promotion history table for each campaign. This deletes S_CAMP_CON records for that campaign.

NOTE: You need to delete records only from S_CAMP_CON. You do not need to delete records from S_DD_USER_KEY because these records are reused.

Increasing the Max EAI Records parameter. If your EAI transaction volume is very high, you may need to increase the value of this parameter to improve performance.

To view or change the Max EAI Records parameter

- 1** From the application-level menu, choose View > Site Map > Server Administration > Components.
- 2** In the Components list, select Marketing Server.
- 3** Click the Component Parameters view tab.
- 4** In the Component Parameters list, locate Max EAI Records.
- 5** To change the value, use one of the following steps:
 - To change the value for only the current session, increase the number in Current Value to be higher.
 - To change the value for the current and future sessions, change Current Value and Value on Restart to a higher value.

NOTE: When you restart the Marketing Server, the parameter value reverts to the value in Value on Restart.

Initializing Multistage Programs

Before you execute multistage programs, set up your Marketing Repository to track the campaign history of customers across multiple stages of a marketing program. For more information, see [“Working With Tables” on page 81](#) and [“Joining Tables and Fields” on page 108](#).

Set up multistage program processes by creating a new record (mapping) for each of the following tables and setting up table joins:

- S_CAMP_CON. This table holds the identifiers of contacts for specific campaigns.
- S_DD_USER_KEY. Use this table to map external contact keys (contacts, customers) to the Contact ID in the S_CONTACT table during Campaign Load.

Mapping Tables

Use the following procedure to map tables required for multistage marketing programs. After you create and save the table records, columns for both tables will be populated in the Siebel Marketing Repository.

These joins are only used when funneling is enforced. Funneling is enforced when the program is on an automatic schedule and you have set the Suppress Same Stage flag.

To map tables S_CAMP_CON and S_DD_USER_KEY

- 1** From the application-level menu, choose View > Site Map > Marketing Administration screen > External Data Mapping.
- 2** Click the Tables view tab.
- 3** In the Tables list, create a new record.
- 4** Type the required parameters for each new table, including Reference Name, Table Name, Server, and so on and save the record.

NOTE: Make sure you type the case-sensitive reference names correctly for these two tables. The server searches the Marketing Repository by exact name.

- a** Map the Siebel Database table S_CAMP_CON using the case-sensitive reference name S_Camp_Con.
 - b** Map the Siebel Marketing Repository table S_DD_USER_KEY using the case-sensitive reference name S_DD_User_Key.
- 5** Map the S_DD_USER_KEY table, using Key1, Key2, and so on, based on targeting levels.

For more information, see [“Creating Customer Hierarchies and Adding Targeting Levels” on page 98](#) and [“Mapping Tables to Customer Hierarchies” on page 100](#).

Creating Joins for Multistage Programs

The S_CAMP_CON and S_DD_USER_KEY tables must be joined before you can execute multistage marketing programs with recurring stages. The join may use several Parent fields and Child fields to join Key 1, 2, and so on. Use the following procedure to set up the joins necessary to execute multistage marketing programs. For more information, see [“Understanding Joins” on page 103](#).

To create joins for multistage programs

- 1 From the application-level menu, choose View > Site Map > Marketing Administration screen > External Data Mapping.
- 2 Click the Joins view tab.
- 3 In the Joins list, create a new record.
- 4 Join the external table to S_DD_USER_KEY table using Key01, Key02, and so on.

The S_DD_User_Key table is used to map external contact keys (contacts and customers) to the contact ID in the S_CONTACT table during campaign load. The S_Camp_Con table contains the identifiers of contacts for specific campaigns.

- 5 Join S_DD_User_Key to S_Camp_Con, using S_DD_User_Key.ROW_ID to S_Camp_Con.DD_USER_KEY_ID.

CAUTION: Make sure that you select the Cache check box, select 1:N in the Cardinality field, and select Equal in the Type field.

- 6 In the Joins list, complete the fields, as shown in [Figure 1](#).

For additional information, see [“Guidelines for Caching”](#) on page 109.

The screenshot shows the Siebel Marketing configuration interface for Joins. The 'Joins' tab is selected, and the configuration for a join between 'S_DD_User_Key' (Parent Table) and 'S_Camp_Con' (Child Table) is displayed. The join type is 'Equal', cardinality is 'N:N', and cost is '1,000'. The 'Cache' checkbox is checked. Below the join configuration is a 'Fields' table with one row: Sequence 1, Parent Field CON_ID, Child Field CON_PER_ID, and Operator =.

Sequence	Parent Field	Child Field	Operator
1	CON_ID	CON_PER_ID	=

Figure 1. Join S_DD_USER_KEY to S_CAMP_CON

Activating Workflow Processes

Workflow processes must be activated before you can use them. To activate a workflow process, navigate to the Workflow Processes view of the Business Process Administration screen and select a workflow process. Then you click Revise, make any changes, and click Activate. When activated, the workflow process Status field will contain a value of Active. For details about making changes necessary for your business needs, see *Siebel Business Process Designer Administration Guide*.

Make sure that the following workflow processes (listed in alphabetical order) have been activated in the Business Process Administration screen before attempting to use Siebel Marketing:

- **Analytic Adapters.** See [“Editing the Workflow Process for Siebel Analytics”](#) on page 71.
- **Automatic Data Retrieval.** This workflow is invoked any time you insert a new record in the ETL Result (S_ETL_RUN) table. For more information, see [“Automatic Data Retrieval”](#) on page 143.
- **Campaign Launch.** This workflow is called when you launch a campaign. For more information, see [Chapter 21, “Launching Programs and Campaigns.”](#)

- **Campaign Load.** This workflow is called when you load a campaign. For information about manually loading a campaign, see [“Manually Loading a Campaign \(Generating a List\)” on page 464](#). For information about loading a campaign (generating a list) automatically, see [“Using the Schedule Calendar View” on page 511](#).
- **Campaign List Association.** This workflow associates a list with a campaign and deleting a list from a campaign.
- **Marketing Plan Recalculation.** This workflow is called when you navigate to the Marketing Plans screen and click Recalculate in the More Info view tab. This rolls up values across campaigns, programs, sub-plans and plans.
- **Program Execution.** Program Execution is used for executing programs automatically. For more information, see [Chapter 21, “Launching Programs and Campaigns.”](#)

Enabling Automatic Response for Opportunities and Orders

Responses can be created automatically when you associate a campaign with an order, associate a campaign as a source for an opportunity, or create an opportunity using the Create Oppty button in the Campaign screen. By default, the user properties for automatic response creation are disabled.

To enable auto-response creation in the Orders, Opportunities, and Campaigns screens, perform the following tasks in Siebel Tools:

- **Orders screen.** Set the User property Create Auto Response Service to Y in the Order Entry - Orders business component.
- **Opportunity screen, Contacts view.** Set the User property Create Auto Response Service to Y in the Contact business component.
- **Campaigns screen, Contacts/Prospects view tab.** Enable the Create Oppty button by setting the User property Create Auto Response Service to Y in the Opportunity business component.

Adding a Position to the Marketing Administrators Access Group

If a user's position is not assigned to the Marketing Administrators access group, the user will be unable to perform any of the following three actions:

- Selecting Launch Campaign in the Program Flow view. Launching a campaign sends email offers for an email campaign and invokes FTP to send output list files to vendors.
- Starting a schedule. The Activate Schedule button on the Program Schedule view is only available if the user's position is a member of the Marketing Administrators access group. Clicking this button causes the marketing program to activate at the scheduled time on the calendar.
- Rescheduling a stage of a marketing program if the stage fails.

For more information about access groups, see *Security Guide for Siebel eBusiness Applications*.

To add a position to the Marketing Administrators access group

- 1** From the application-level menu, select View > Site Map > Group Administration > Access Groups.
- 2** In the Access Groups list, query for Marketing Administrators.
- 3** In the Members list, create a new record and select the appropriate position.

Campaign Load Mapping and Analytic Adapters

3

Campaign load mappings define the way campaign-related data is copied from an internal or external marketing data source into the Siebel database for launching a campaign. You must define campaign load mappings for internal and external data sources before you can use Siebel eBusiness Application Integration (eAI) technology to import this information. For example, contact information such as first and last name, phone number, and email address can be brought into the Siebel database during campaign load only if you define campaign load mappings for this data. The Campaign Load workflow process is used to manage the load process.

A campaign load mapping must be associated with a program stage even if the data source comes from the Siebel Data Warehouse. Refer to [“Using the Marketing Person Integration Object” on page 57](#) for creating a campaign load mapping for the eBusiness Data Warehouse.

About Marketing Integration Objects and Components

The Marketing application provides two integration objects, Marketing Contact and Marketing Person. For each campaign load mapping, you must select only one of these two integration objects described in the following list:

- **Marketing Contact integration object.** If any campaign contact names do not exist within the Siebel transactional database, you must use the Marketing Contact integration object. It provides the field mappings necessary to import new contacts and accounts. For more information, see [“Using the Marketing Contact Integration Object.”](#)
- **Marketing Person integration object.** If all your campaign contacts and prospects exist within the Siebel transactional database, then you can also use the Marketing Person integration object. Typically, this configuration occurs for installations that use the Siebel Data Warehouse populated from the Siebel transactional database and that do not introduce new customers into the Data Warehouse from other sources. In this configuration, you only need to provide a mapping of Contact and Prospect IDs between the data warehouse and Siebel transaction database to load the campaign, because the contact field information is already recorded. For more information, see [“Using the Marketing Person Integration Object” on page 57.](#)

You can see examples of contact key component mappings for sample customer hierarchies in [“Sample Mappings for Contact Key Components” on page 52.](#)

Using the Marketing Contact Integration Object

The Marketing Contact integration object provides field mappings to typical contact- or account-related information from the external data sources.

The Marketing Contact integration object has seven integration components, as shown in [Figure 2 on page 49.](#) These components are described in [Table 4 on page 50.](#)

During campaign load, Integration component User Keys determine if a record already exists in the component for the given values and if the record is unique. The required fields are fields that cannot be a null value for the new record.

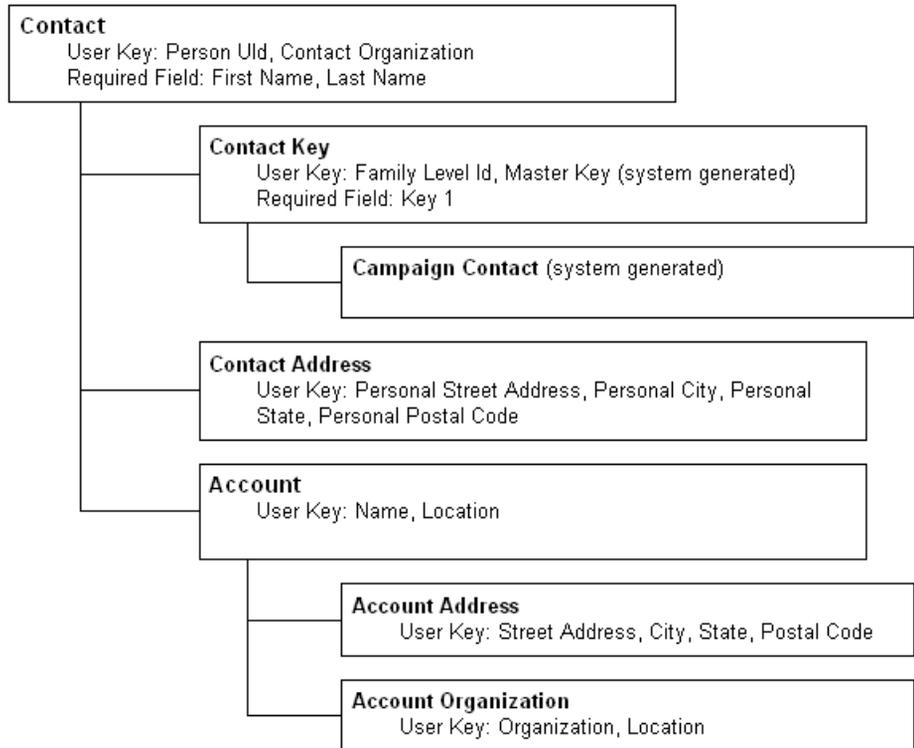


Figure 2. Marketing Contact Integration Components

Table 4. Marketing Person Integration Component Description

Component	Comment
Account	Maps account information associated with the contact.
Account Address	Maps the account address.
Account Organization	Maps information about the account's organization.
Campaign Contact	Maps campaign history level information. This integration component is not exposed in the user interface as the mappings are system generated.
Contact	Maps contact-level information such as the contact's name, telephone number, email address, and so on.
Contact Address	Maps the contact's address information.
Contact Key	The Contact Key component matches each level in the customer hierarchy with the relevant fields in the external database. For example, Key 1 might be the external Account ID, and Key 2, the external Contact ID. By including these keys in the Campaign Load Mapping, customer hierarchy keys are recorded in the Siebel Marketing Repository.

Mapping Rules for Integration Components (Marketing Contact)

Siebel Marketing integration requires at least three integration components: Contact, Contact Key, and Campaign Contact. Campaign Contact is automatically generated by the Marketing Server component.

Use the following rules when mapping components:

- A parent integration component must be mapped before mapping a child component. For example, the Account Address component cannot be mapped unless Account is mapped.

- User Key fields must be mapped for each integration component if one or more fields for the component is mapped. There are two exceptions:
 - Siebel Marketing Server will generate user key fields Master Key and Family Level ID for the Contact Key integration component. However, Key1 is a required field and must be mapped.
 - If Contact Organization is not mapped for a campaign contact, Siebel Marketing Server will default the Contact Organization to the organization set for the Enterprise server user name (usually SADMIN).
- Required fields must be mapped for each integration component if one or more fields for the component are mapped.
- Map Contact Keys (Key 1, Key 2, and so on) for the targeting level at which the Campaign Load Mapping is defined, and the levels above it.

For example, a customer hierarchy might have three targeting levels—Household (primary targeting level), Individual, and Personal Accounts. You might choose the third targeting level, Personal Accounts, as the level for the campaign load mapping. If you map the keys for the Personal Accounts level, you must also map the keys for the Individual level and Household level.

When the targeting level that equates to a Siebel Contact is below the level at which the Campaign Load Mapping is defined, then the level identifying a Siebel Contact should also be mapped. Using the previous example, if you select Household as the level for the Campaign Load Mapping, you must map the Individual level as well. Typically the targeting level that maps to Contact Integration component fields such as first name and last name is the equivalent of a Siebel Contact.

- Siebel Marketing defaults the Account Organization for the campaign contact to Default Organization if the account organization field is not mapped.
- Fields that are mapped to keys should not contain the tilde (~) character. For example, if Customer_ID is mapped to Key1, Customer_ID data should not contain the tilde character.

Sample Mappings for Contact Key Components

Table 5 describes examples of Contact Key component mappings for sample customer hierarchies.

Table 5. Component Mappings for Sample Customer Hierarchies

Customer Hierarchy	Targeting Level Equal to Siebel Contact	Targeting Level for Campaign Load Mapping	Keys Requiring Mapping
Accounts Contacts	Contacts	Accounts	Key 1, Key 2
Accounts Contacts	Contacts	Contacts	Key 1, Key 2
Business Unit Account Decision Maker			Key 4
Customer	Customer	Customer	Key 1
Household Individual	Individual	Household	Key 1, Key 2
Household Individual	Individual	Individual	Key 1, Key 2
Household Individual Personal Account	Individual	Individual	Key 1, Key 2
Household Individual Personal Account	Individual	Personal Account	Key 1, Key 2, Key 3
Household Individual Personal Account (Bank Account)	Individual	Household	Key 1, Key 2

Table 5. Component Mappings for Sample Customer Hierarchies

Customer Hierarchy	Targeting Level Equal to Siebel Contact	Targeting Level for Campaign Load Mapping	Keys Requiring Mapping
Organization	Decision Maker	Business Unit	Key 1, Key 2, Key 3
Organization Business Unit Account Decision Maker	Decision Maker	Organization	Key 1, Key 2, Key 3, Key 4
Organization Business Unit Account Decision Maker	Decision Maker	Account	Key 1, Key 2, Key 3, Key 4
Organization Business Unit Account Decision Maker	Decision Maker	Decision Maker	Key 1, Key 2, Key 3, Key 4

For more information on targeting levels, see [“About Customer Hierarchies” on page 95](#). For more information about eAI, see *Overview: Siebel eBusiness Application Integration Volume I*.

Creating Campaign Load Mappings

The predefined integration object, Marketing Contact, defines the information that will be exchanged between the external data source and Siebel Marketing, using eAI technology.

To create campaign load mappings

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Campaign Load Mapping view tab.
- 3** In the Campaign Load Mapping list, create a new record.
- 4** Complete the necessary fields.
 - a** Type a Name and a Description.

The name and description should identify the purpose of the data mapping or the source of the data.

- b** Click the Customer Hierarchy select button, select a predefined customer hierarchy, and click OK.
- c** Click the Targeting Level select button, select a level, and click OK.
- d** In the Integration Object field drop-down list, select Marketing Contact (default) or Marketing Person.

For guidelines about when to use each integration object, see [“About Marketing Integration Objects and Components” on page 48](#).

- 5** As an optional step, you can set the Allow Repeated Contacts flag. Select the check box in this field if you want to allow the same contact to appear more than once in the same campaign. For example, if you are marketing to businesses, an individual may be listed as a contact for more than one business. You may wish to send an offer to the contact at both business locations. The majority of campaigns will not require this setting.

Mapping Integration Components and Fields

Before you begin mapping Integration components, create the list measures you need, including list measures for Contact First Name, Middle Name, Last Name, Key 1, Key 2, and so on (for example, Contact ID, Account ID). For more information on creating list measures, see [“Defining List Measures” on page 161](#).

To map integration components and fields

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Campaign Load Mapping view tab.
- 3** In the Campaign Load Mapping list, select the format to be mapped.
- 4** In the Mapping list, create a new record.
- 5** Create the required mappings for each integration component.

Create as many mappings as you need to fully identify the contact and to provide other relevant fields. For more information, see [“Mapping Rules for Integration Components \(Marketing Contact\)” on page 50](#).

If a secondary level is chosen, a customer key must be mapped for that level as well as parent levels. For example, if a mapping is created at level 2 of a customer hierarchy, then Key 1 and Key 2 should be mapped.

- a** Choose an integration component from the list.
Example: Contact
 - b** Choose the Integration Component Field from the list.
Example: First Name
 - c** Choose a Measure from the list.
Example: list measure FIRST_NAME
- 6** Click Save after each mapping record is completed.
 - 7** When you are finished, click Validate.

Validation makes sure that every mandatory eAI field has been specified.

Validating Campaign Load Mapping

When validating a campaign load mapping, Siebel Marketing checks the mappings against the field definitions in the Marketing Repository for each integration component in the mapping list. It also verifies that the following requirements are met:

- User Key fields are mapped for every integration component that has at least one field mapped by the user.
- Required fields are mapped.
- The mapping includes Contact Keys (Key1, Key 2, and so on) for the targeting level at which the Campaign Load Mapping is defined, and the levels above it.
- The parent integration component is mapped for every child component.

Validation does not check the Contact Organization and Account Organization fields for the contact integration component because the Marketing Server provides a default value if they are not mapped.

Siebel Contact and Campaign History Tables

When you generate a contact list (Load Campaign), the Marketing Server modifies data in the Siebel database after Contact and Contact Key integration components are mapped and campaign load mapping data is modified.

- **Contacts table (S_CONTACT).** The Contacts table stores contact-level information.
- **Campaign History table (S_CAMP_CON).** The Campaign History table contains the history of contacts that qualify for campaigns, as well as the Campaigns ID, Segment ID, Wave ID, and so on.
- **External Keys table (S_DD_USER_KEY).** The External Keys table contains customer hierarchy keys data for a contact in addition to target-level ID. Database keys (such as Account Number and Customer ID) that are mapped to the Contact Key integration component fields for each targeting level are recorded in this table for every contact targeted by a marketing program.

If you include optional integration component fields such as Account or Contact Address in the campaign load mapping, other Siebel tables are updated with data according to the integration fields that are mapped.

For every record that qualifies for a campaign the Campaign Load process first determines if the contact record exists based on the Contact component user key. The following actions are performed, as shown in [Table 6](#):

Table 6. Campaign Load Table Update Rules

Siebel Contact Record	S_CONTACT	S_DD_USER_KEY	S_CAMP_CON
Exists	Update existing record	Update existing record	Insert new record
Does not exist	Insert new record	Insert new record	Insert new record

NOTE: If you use the Marketing Contact integration object, the lookup uses the User Key fields for Contacts and Accounts (see [Figure 2 on page 49](#)). If you use the Marketing Person integration object, the lookup only requires the Contact ID or Prospect ID to confirm that the person is present in the transaction database.

Using the Marketing Person Integration Object

The Marketing Person integration object should be used only when all target contacts and prospects in the campaign already exist in the transaction database. The only mapping required is a mapping between the Row ID from the Contact and Prospect tables in the Siebel transaction database and the external data source, typically the Siebel Data Warehouse.

The Marketing Person integration object contains the two integration components described in [Table 7](#).

Table 7. Marketing Person Integration Component Description

Component	Comment
Campaign Contact	Identifies the Account ID for the contact (Optional)
Contact Key	Maps the Contact and Prospect IDs from the external data source (Required)

Mapping Rules for Integration Components (Marketing Person)

When creating a campaign load mapping using the Marketing Person integration object, use the following guidelines:

- Only the Contact Key integration component is required to be mapped. The only required field is Key 1.
- The Contact ID and Prospect ID values imported from the external data source must match the Row IDs for the Contact or Prospect in the Siebel contact or prospect tables.
- A single campaign can be based only on a single contact source table (each campaign can only use one campaign load mapping).

In a single campaign load record, you can map an integration component's integration component field to only one measure. For example, in a campaign load record for the Contact integration component, if you map the First Name integration component field to a measure called HH First Name, you cannot create another mapping record in the same campaign load record for the First Name integration component field to a different measure.

- If all incoming target names are contacts, then you do not need to map Prospect ID. Alternatively, you might use the Marketing Contact integration object. If all incoming target names are prospects, then you do not need to use Contact ID. If the target list includes both contacts and prospects, then both fields are required.
- Mappings for the Campaign Contact integration component are required only if Allow Repeated Contacts is selected for the campaign load mapping. This is because a contact might appear in the campaign for more than one account.

To create a campaign load mapping using the Marketing Person integration object

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2 Map the data source table that contains Contact ID and Prospect ID. For the Siebel Data Warehouse, this table is W_PERSON_D.

- 3** Click the Tables view tab and add two pseudo-fields to the table using the following information:

Reference Name	Expression
Contact_ID	Case when contact_type_i = 'Contact' then integration_id else null end
Prospect_ID	Case when contact_type_i = 'Prospect' then integration_id else null end

- 4** From the Show drop-down list, select Measures.
- 5** Click the List view tab and create list measures for the following:
 - a** Contact_ID.
 - b** Prospect_ID.
- 6** Create a list measure for Customer or Integration ID in the Data Warehouse (this value will map to Key 1).

 In the Siebel Data Warehouse, this field is INTEGRATION_ID field in the W_PERSON_D table and should uniquely identify the contact or prospect in the external data source.
- 7** From the Show drop-down list, select External Data Mapping and click the Campaign Load Mapping view tab.
- 8** In the Campaign Load Mapping list, create a new record, selecting Marketing Person in the Integration Object field.
- 9** In the Mappings list, create a new record.
 - a** In the new record, select the Contact Key integration component and map the following fields:

Integration Component Field	Measure
Contact Id	Contact ID

Integration Component Field	Measure
Key 1	Integration ID
Prospect Id	Prospect ID

- b** As an optional step, if you selected the Allow Repeated Contacts check box, create another record in the mappings list for the Campaign Contact integration component and map the Account ID field.
- 10** Create a new customer hierarchy with one targeting level, mapping the Integration ID field from the external table to the targeting level.

For instructions, see procedures in [“Creating Customer Hierarchies” on page 99](#).

Campaign Load Mapping Mappings depend on the following:

- **The Data source.** The data source includes Siebel eBusiness Data Warehouse, Siebel database, or a non-Siebel data source.
- **The Data elements required to be imported into Siebel.** These elements include Contact fields, Account fields, Contact address, and so on.
- **Contact Qualification.** Determine if new contacts or existing contacts qualify for a campaign.
- **Presence of contacts and prospects in the Siebel database.** Determine if all contacts and prospects are already present in the contact and prospect tables in the Siebel database.

The following scenarios show some recommended mappings. The scenarios do not include all the required fields for each example, but provide the recommended field mappings for certain integration component fields.

Scenario 1

In this scenario, use the recommended mappings shown in [Table 8](#).

- **Data source.** Siebel eBusiness Data Warehouse.
- **New contacts.** No new contacts introduced into Siebel database during Campaign Load.
- **Prospects.** Prospects are not included in the campaign.
- **Customer hierarchy.** Accounts to Contacts.

Table 8. Scenario 1 Recommended Mappings

Integration Component	Integration Component Field	List Measure Field	Comment
Contact	Person UID	W_PERSON_D.PRSP_CON_UID	
Contact	Contact Organization	W_PERSON_D.CON_BU_NAME	
Contact Key	Key 1	W_PERSON_F.ACCNT_WID, W_ORG_D.ROW_ID	The field can vary depending on customer hierarchy mappings.
Contact Key	Key 2	W_PERSON_F.CONTACT_WID, W_CONTACT_DM.ROW_WID	The field can vary depending on customer hierarchy mappings.

Scenario 2

In this scenario, use the recommended mappings shown in [Table 9](#).

- **Data source.** Siebel eBusiness Data Warehouse.
- **New contacts.** No new contacts introduced into the Siebel database during Campaign Load.
- **Prospects.** Prospects are not included in the campaign.
- **Customer hierarchy.** Accounts to Contacts.
- **Deleted contacts.** Siebel eBusiness Data Warehouse may not be synchronized with the Siebel database because contacts have been deleted, and the deleted contacts should not be included in campaigns.

Table 9. Scenario 2 Recommended Mappings

Integration Component	Integration Component Field	List Measure Field	Comment
Contact	Person UID	S_CONTACT.PERSON_UID	Equal join from W_PERSON_D.PRSP_CON_UID to S_CONTACT.PERSON_UID.
Contact	Contact Organization	S_BU.NAME	Equal join S_CONTACT.BU_ID to S_BU.PAR.ROW_ID.
Contact Key	Key 1	W_PERSON_F.ACCNT_WID, W_ORG_D.ROW_ID	The field can vary depending on customer hierarchy mappings.
Contact Key	Key 2	W_PERSON_F.CONTACT_WID, W_CONTACT_DM.ROW_WID	The field can vary depending on customer hierarchy mappings.

Scenario 3

In this scenario, use the recommended mappings shown in [Table 10](#).

- **Data Source.** Siebel database.
- **Prospects.** Prospects are not included in the campaign.
- **Customer hierarchy.** Accounts to Contacts.

Table 10. Scenario 3 Recommended Mappings

Integration Component	Integration Component Field	List Measure Field	Comment
Contact	Person UID	S_CONTACT.PERSON_UID	Equal join from W_PERSON_D.PRSP_CON_UID to S_CONTACT.PERSON_UID.
Contact	Contact Organization	S_BU.NAME	Equal join S_CONTACT.BU_ID to S_BU.PAR_ROW_ID.
Contact Key	Key 1	S_ORG_EXT.ROW_ID	The field can vary depending on customer hierarchy mappings.
Contact Key	Key 2	S_CONTACT.ROW_ID	The field can vary depending on customer hierarchy mappings.

Scenario 4

In this scenario, use the recommended mappings shown in [Table 11](#). The table displays the recommended minimum mapping requirement. Other fields from available components may need to be mapped based on program or campaign requirements.

- **Data Source.** Siebel database.
- **Prospects.** Prospects may be included in the campaign.
- **New contacts.** No new contacts or prospects are introduced into the Siebel database during Campaign Load.
- **Customer hierarchy.** Person (one targeting level).

Table 11. Scenario 4 Recommended Mappings

Integration Component	Integration Component Field	List Measure
Contact Key	Key 1	Integration ID
Contact Key	Contact Id	Contact ID (Pseudo-field)
Contact Key	Prospect Id	Prospect ID (Pseudo-field)

Scenario 5

In this scenario, use the recommended mappings shown in [Table 12](#). The table displays the recommended minimum mapping requirement. Other fields from available components may need to be mapped based on program or campaign requirements.

- **Data source.** Non-Siebel database.
- **New contacts.** New contacts are introduced into the Siebel database during Campaign Load. External contacts have a pre-assigned Organization.
- **Customer hierarchy.** Household to Individual.

Table 12. Scenario 5 Recommended Mappings

Integration Component	Integration Component Field	Required	List Measure	Comment
Contact	Person UID	Yes	Individual ID	ID of the customer hierarchy mapping to Siebel Contact.
Contact	Contact Organization	No	Organization field	The organization names in the source database must match exactly with Siebel organization setup (S_BU).
Contact	First Name	Yes	Individual's First Name	
Contact	Last Name	Yes	Individual's Last Name	
Contact Key	Key 1	Yes	Household ID	
Contact Key	Key 2	No	Individual ID	

Scenario 6

In this scenario, use the recommended mappings shown in [Table 13](#). The table displays the recommended minimum mapping requirement. Other fields from available components may need to be mapped based on program or campaign requirements.

- **Data source.** Non-Siebel database.
- **New contacts.** During campaign load, no new contacts are introduced into the Siebel database. External contacts do not have a preassigned organization.
- **Customer hierarchy.** Household to Individual.
- **Targeting level equivalent to Siebel Contact.** Individual.

Table 13. Scenario 6 Recommended Mappings

Integration Component	Integration Component Field	Required	List Measure	Comment
Contact	Person UID	Yes	Individual ID	ID of the customer hierarchy mapping to Siebel Contact.
Contact Key	Key 1	Yes	Household ID	
Contact Key	Key 2	No	Individual ID	

About Analytic Adapters

An analytic adapter is a data interface that allows Siebel Marketing to integrate and use analysis results from Siebel Analytics, other analysis applications, query tools, online analytical processing (OLAP) tools, and scores from data mining tools.

The analysis results, called target groups, consist of sets of customers sharing similar attributes. Target groups can be derived from various targeting levels such as Contacts, Accounts, Households, and Individuals. Target groups can also include related data elements such as model scores, cluster numbers, and lifetime values.

During the analytic adapter process, the target groups are loaded into prebuilt analytical adapter tables in the Siebel database. Users can then map these tables to build hierarchical attributes, measures, buckets, and fields to be used in:

- Segmentation criteria
- Filter criteria
- Output file layouts
- Launching campaigns

An analytic adapter includes the following components:

- **Extractor.** This component extracts results from the analytical tool or application. Siebel Marketing partners or customers who use Siebel Analytics develop the extractor, which is custom-configured for each analytical tool. An Analytic Adapter extractor for Siebel Analytics is included as part of the Siebel Marketing Server component group.
- **Analytic adapter tables.** These tables in the Siebel database hold information related to analytic adapter target groups.
 - The Analytic Adapter lookup table (S_DD_TRGT_GRP) holds information about the target group, including fields such as Name, Source, Number of records, Created date, and Expiration date.
 - The Analytic Adapter data table (X_DD_TRGTGRPMBR) holds target group details and a link (foreign key) to the Analytic Adapter lookup table. The data table can hold up to seven target group attributes or fields that might include customer hierarchy IDs and related information. In addition, there is one placeholder for a data mining score.

- **Analytic Adapter workflow process.** This workflow process creates a target group record in the Analytic Adapter lookup table and loads data into the Analytic Adapter data table.

The workflow runs the Analytic Adapter server component, that is part of Marketing Server component Group. The workflow process also retrieves data for attribute families defined on the Analytic Adapter data table, so that the latest list of target groups is visible and accessible to the marketer. The Analytic Adapter workflow process for Siebel Analytics is called Analytic Adapter. For more information on workflow processes and the Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Setting Up Analytic Adapters

Mappings and other setup procedures that need to be performed on Analytic Adapter tables depend on the type of information imported into Siebel Marketing and other end-user requirements.

Some general recommendations for mapping tables, setting up joins, and building attribute families are provided in the following sections. For details, see [Chapter 4, “External Data Mapping.”](#)

Mapping Tables for Analytic Adapters

Map the following tables from Siebel Marketing Repository server:

- Analytic Adapter data table (X_DD_TRGTGRPMBR). Set the table Type as Analytic Adapter.
- Analytic Adapter lookup table (S_DD_TRGT_GRP). Set the table Type as Regular.

Mapping Analytic Adapter Tables to a Customer Hierarchy

The mapping depends on the level at which the data is exported from the analytic tool and the Siebel Marketing customer hierarchy. [Table 14](#) shows some sample mappings.

Table 14. Sample Mapping to Customer Hierarchy

Data Source	Exported Data	Customer Hierarchy	Mappings	Comment
Siebel eBusiness Data Warehouse	Account ID, Contact ID	Account to Contact	X_DD_TRGTGRP MBR.KEY_01 to Account Level and X_DD_TRGTGRP MBR.KEY_02 to Contact level	
Siebel eBusiness Data Warehouse	Contact ID	Account to Contact		No mappings needed
External Data Source	Customer ID, Model score	Customer	X_DD_TRGTGRP MBR.KEY_01 to Targeting level	
External Data Source	Individual ID	Household to Individual		No mappings needed

Creating Joins for Analytic Adapters

In the Joins view, you must join the customer table in the data source to the Analytic Adapter data table. The parent table and the joining fields depend on the level at which the data is exported from the analytical tool. In the join examples shown in [Table 15 on page 70](#), the parent table may differ depending on your implementation requirements.

- Join X_DD_TRGTGRPMBR to S_DD_TRGT_GRP using the S_DD_TRGT_GRP_ID and ROW_ID fields respectively. Set this join for Cache.
- Set up a start point join to both the Analytic Adapter data table and the lookup table.

The sample joins may need to be set as Outer joins, if records that are not part of the target group are needed for a snapshot build (for example, if you are combining members of a target group with other contacts in your database). In addition, the joins should be designed for Cache (Cache check box) if X_DD_TRGTGRPMBR is not mapped in the Customer Hierarchies view.

Table 15. Sample Joins

Data Source	Exported Data	Customer Hierarchy	Parent Table	Join
Siebel eBusiness Data Warehouse	Account ID, Contact ID	Account to Contact	W_PERSON_F	W_PERSON_F.ACCNT_WID to X_DD_TRGTGRPMBR.KEY_01 and W_PERSON_F.CONTACT_WID to X_DD_TRGTGRPMBR.KEY_02
Siebel eBusiness Data Warehouse	Contact ID	Account to Contact	W_PERSON_F.CONTACT_WID	W_PERSON_F.CONTACT_WID to X_DD_TRGTGRPMBR.KEY_01
External Data Source	Customer ID, Model score	Customer		CUSTOMER.ID to X_DD_TRGTGRPMBR.KEY_01
External Data Source	Individual ID	Household to Individual		INDIVIDUAL.ID to X_DD_TRGTGRPMBR.KEY_01

Using Fields for Data Retrieval

Enable the target group name in the Analytic Adapter Lookup table for Data Retrieval (S_DD_TRGT_GRP.NAME). Data is not automatically retrieved for this field after a target group load.

Creating Attribute Families for Analytic Adapters

You must create an attribute family based on the Analytic Adapter tables, using the source of the Target Group and the Target Group Name as attributes. The base field is X_DD_TRGTGRPMBR.DD_TRGT_GRP_ID. The attributes are detailed in [Table 16](#).

Table 16. Attributes for Attribute Family

Attribute Name	Code Table	Code Field	Label Table	Label Field
Target Groups	S_DD_TRGT_GRP	ROWID	S_DD_TRGT_GRP	NAME
Sources	S_DD_TRGT_GRP	SRC_TOOL_NAME	S_DD_TRGT_GRP	SRC_TOOL_NAME

When you have finished defining the attribute family, define an attribute hierarchy using Sources to Target Groups as attributes in the hierarchy.

Editing the Workflow Process for Siebel Analytics

The Analytic Adapter workflow process is used to load target groups for Siebel Analytics. You can add the Analytic Adapter data table to this workflow for Siebel Analytics. For more information on workflow processes and the Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

To add the Analytic Adapter data table to the workflow process

- 1** From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
- 2** In the Workflow Processes list, select the Analytic Adapters workflow process and click the Process Properties view tab.
- 3** In the Process Properties list, locate the TableReference property.
- 4** In the Default String field, type the reference name of the Analytic Adapter data table that you plan to use.
- 5** Save the modified record.

Creating Analytic Adapter Workflow Process for Other Analytic Tools

Create an Analytic Adapter workflow process for each analytical tool from which data will be loaded using the Analytic Adapter.

NOTE: You do not need to add a process for Siebel Analytic Adapter.

To set up a new workflow process

- 1** From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
- 2** In the Workflow Processes list, select the Analytic Adapters workflow process.
- 3** Copy the Analytic Adapter workflow process, and name the copy.
 - a** Click the menu button and choose Copy Record.
 - b** In the name field, type a name for the copy, and save the record.
- 4** In the Workflow Processes list, select the new process and click the Process Properties view tab.
- 5** Change the properties for the new workflow process using [Table 17 on page 73](#) as a guide.
- 6** Click the All Processes view tab to return to the Workflow Processes list.

- 7** In the Workflow Processes list, click Activate when the workflow is ready to use. The property values that you set are defaults and can be changed during a target group load.

Table 17. Workflow Process Properties

Property Name Field	Action
AnalyticTool	In the Default String Field, change the value to the name of the Analytical tool. This parameter stores the source of the Target Group in S_DD_TRGT_GRP.SRC_TOOL_NAME
NumberOfDataKeys	In the Default Number field, type the number of data elements that will be exported from the analytical tool, excluding the data mining score. For example, if customer ID and a model score will be extracted from an analytical tool, then type 1 for this property.
Process Name	In the Default String field, type the name of the new workflow process.
ReportFileName	In the Default String field type the path to the directory where the target groups for the analytical tool are stored. This optional property stores the path and file name of the target group.
TableReference	In the Default String field, type the reference name for the Analytic Adapter data table.
TargetGroupName	In the Default String field, type a default name for the target group. This optional property is the name of the target group stored in S_DD_TRGT_GRP.NAME.

Loading Target Groups

Multiple Target Groups can be loaded into the Siebel database using the appropriate workflow process. The source file for Analytic Adapters should not contain quotation marks, and the file should have a fixed format with tab-delimited data in each row tab.

NOTE: Target Groups created in Siebel Analytics are automatically loaded into the Siebel database. For information, see [“About Visual Segmentation” on page 229](#).

To load target groups

- 1** From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
- 2** In the Workflow Processes list, select the Analytic Adapters workflow process created for the target group.
- 3** Click the Process Simulator view tab.

For details, see [“Creating Analytic Adapter Workflow Process for Other Analytic Tools” on page 72](#).

- 4** In the Simulator designer, click Start.
- 5** In the Process Simulator list, click the select button in the Process Property Name field.
- 6** In the list of properties, modify the default values for properties such as TargetGroupName, ReportFileName, and so on.
- 7** Save the changes and click Close to close the properties list.
- 8** In the Simulator designer, click Continue.

In the Process Simulator list, the status of Completed in the Process Status field indicates that a request to the server to load the target group has been submitted.

An existing target group is overwritten if a new target group with the same name is loaded. The target group record is written to the Analytic Adapter lookup table (S_DD_TRGT_GRP table) when the server component starts the load process.

The first column of a target group (Key_01) cannot have a null value because a not-null database index exists on the Key_01 column.

Checking the Target Group Load

Siebel Marketing’s Analytic Adapters view allows you to verify the target group has loaded and is visible in the Analytic Adapters list.

To verify that the target load completed successfully

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2 Click the Analytic Adapters view tab.

The Analytic Adapters list shows the server and table names for the analytic adapter, for example, SQLServer MetaModel and user_name.X_DD_TRGRGRPMBR.

- 3 In the read-only Target Groups list, locate your target group.

The following table describes the information that is displayed in the fields.

Field	Comment
Count	The number of contacts in the target group. This number is provided by Siebel Marketing when the target group is loaded. If this field is blank, the target group has not yet been loaded.
Date Loaded	The date the target group was loaded.
Description	Automatically populated with the target group’s description.
Expiration Date	The date the selected target group expires.
File Name	Provides the name of the Target Group file.
Name	Provides the path name to the target group. The file can reside in any directory specified by your marketing administrator.
Source	Siebel Analytics, or another source for the data.

Campaign Load Mapping and Analytic Adapters

About Analytic Adapters

This chapter contains information about mapping server definitions, tables and fields, and customer hierarchies. In addition, it describes how to join tables from the data sources and map them to customer hierarchies. Information about joining tables and fields provides a way to associate and merge related data from data sources into Siebel Repository tables and fields. For more information, see the following topics:

- [About Server Definitions on page 78](#)
- [Mapping to Tables from the Servers View Tab on page 80](#)
- [Working With Tables on page 81](#)
- [Working With Fields on page 90](#)
- [About Customer Hierarchies on page 95](#)
- [Designing Customer Hierarchies on page 96](#)
- [Creating Customer Hierarchies and Adding Targeting Levels on page 98](#)
- [Mapping Tables to Customer Hierarchies on page 100](#)
- [Understanding Joins on page 103](#)
- [Joining Tables and Fields on page 108](#)
- [Mapping Data for Visual Segmentation on page 115](#)

About Server Definitions

Siebel Marketing can access multiple servers (data sources) that hold customer data. When you create server definitions, you provide the ODBC connection information to access selected tables in each of your supported relational database management system (RDBMS) sources. Siebel Marketing Server also connects to the Marketing Repository tables in the same way that it accesses other data sources.

Because Siebel Marketing can extract information from multiple servers simultaneously and can join tables that are in separate RDBMSs, you can create as many data source server definitions as necessary. For example, if customer data and transactions data are in separate physical databases, you might create two Data Source server definitions. For more information, see [“Creating Server Definitions” on page 79](#). For instructions unique to Visual Segmentation, see [“Mapping Data for Visual Segmentation” on page 115](#).

The Marketing Repository is a set of tables that record the information to support marketing server processes such as segment criteria, attributes, measures, and data mapping metadata. In addition, it handles processes for counts, snapshots, and lists. The Marketing Repository consists of a set of system tables in the Siebel database, thus it shares the same system DSN as the main Siebel Database. Although the Marketing Repository record can only be created once, the values for the reference name, DSN, user name, and password can be updated at any time.

As part of initialization, an administrator needs to set up a server of type Marketing Repository that points to the Siebel transactional database so that the Marketing Server can map and join temporary tables (attribute tables) that are created by the Marketing Server during data synchronization. There can be only one Marketing Repository server and the user name and password must match the Siebel OLTP table owner.

- **Siebel Marketing Server.** Refers to the metadata contained in the Marketing Repository tables before performing tasks such as a records extract, count, or data retrieval.
- **Test Server.** If you are testing new measures and attributes and your data warehouse has many millions of records, you may benefit from creating a special test server that loads only a fraction of your total records. Creating a test server can save time when designing and testing measures and attributes, as well as freeing the main server for other work.

Creating Server Definitions

Using the Servers view tab, you can create definitions that point to each data source server and the Marketing Repository server. The Siebel server does not validate the data source name (DSN). You need to make sure that the DSN is valid and points to the correct data source. For Windows NT, make sure that the DSN is a system DSN on NT to avoid errors that could result from using different NT logins.

NOTE: For data integrity reasons, once you have saved a server definition, you cannot delete the server definition from the list.

To add a new server definition for a data source

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2 In the Servers list, create a new record.
- 3 Complete the necessary fields for each server record, using the following table as a guide.

Field	Comment
Name	Type a name for the server. The server name does not have to correspond to an actual server name on your network.
ODBC DSN	Type the ODBC Data Source Name (DSN) exactly as identified in the ODBC control panel.
Password	Type the user password.
Type	Choose Data Source (default) or Marketing Repository. If the Marketing Repository server definition already exists, you must choose Data Source as the server Type. You can create more than one Data Source Server, depending on how your data is stored. Only one Marketing Repository server can be defined. If you attempt to define a second Marketing Repository Server, an error message is displayed.
User Name	Type a user name. Be sure to check whether your database has a case-sensitive user name and password before mapping tables.

Mapping to Tables from the Servers View Tab

You use the Tables list in the Servers view tab to add and view tables associated with a particular data source server. Tables in this view are sorted by data source (server) definition.

You can also map to tables using the Tables view tab, where the list of tables is sorted alphabetically. For details, see [“Working With Tables” on page 81](#).

To map to tables from the Servers list

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** In the Servers list, select the server record.
- 3** In the Tables list, create a new record.
- 4** In the new record, complete the fields, using [Table 18 on page 83](#) as a guide.

NOTE: Be sure you spell the table name correctly and preface the table name with the database table owner name (for example, Table_Owner.Table_Name). The table owner name may be different from the User Name for the data source Server record in the Servers list.

Working With Tables

Siebel Marketing can use data from any supported ODBC-accessible data source. Typically data source means your data warehouse or data mart, but you can use imported data (such as a file with demographics information).

NOTE: Because some databases such as Oracle do not support Unicode characters in their table names, we cannot support Unicode characters in table names and field names in the Siebel Data Warehouse.

Sometimes, the underlying data source tables need to be renamed or moved to a different schema or database instance. To preserve the mappings and other definitions that are sourced from this table, perform the following tasks:

- If the table was renamed, edit the appropriate table record in Tables view to reflect the change.
- If the table was moved, create a new DSN (if one does not exist) to the new location, edit the table record, and change the DSN.

NOTE: There is no system validation to verify that a table record is edited correctly.

To map tables, perform the following tasks:

- [Mapping Tables From a Data Source on page 82](#)
- [Understanding Partition and Union Tables on page 85](#)
- [Creating Union and Partition Tables on page 88](#)

Mapping Tables From a Data Source

When you add (map) a table in Siebel Marketing Administration, a server process links to the physical table in the data source and maps the definition of its fields. Because you might need the same data for many different purposes, you can map a table multiple times. The process to retrieve the table definition is referred to as a data dictionary task.

NOTE: You cannot delete a table after it is saved because others may be using fields from an existing table.

Use the Tables view to map the Marketing Server metadata to tables within your target data source that contain data relevant to your marketing programs and campaigns.

To map a table

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Tables view tab.
- 3** In the Tables list, create a new record.

- 4 Complete the necessary fields, using [Table 18](#) as a guide, and save the record.

Table 18. Table Fields

Field	Description
Constraint	<p>(Optional) Type a constraint (SQL expression) to create a restricted view of the table by applying SQL WHERE clauses to the table. Constraints are applied every time the table is accessed. The syntax of the clause is not validated when you add the table record. If you want to apply Program or Stage specific constraints use the Filter functionality. The Marketing Server will prefix the constraint with WHERE before executing SQL For examples, see the following list:</p> <ul style="list-style-type: none"> ■ If you want to create a subset of a transaction table for a specific geographic region, you might type the constraint: <code>State=CA</code>. ■ If you want to create a constraint limiting the data to accounts with an opening balance greater than \$500,000, you might type <code>OPENING_BALANCE>500000</code>. <p>The field name for a constraint should be in upper case for SQL Server databases.</p> <p>If you add a constraint to a union table, the constraint applies to each of the partition tables as well.</p>
Description	Type a description for the new table. If it is a union or partition table, note that in the description.
Reference Name	<p>Type a name for the table as you would want it to appear in the Tables list.</p> <p>If you are not adding a constraint (SQL expression), you might want to use the same value as in the Table Name field. If you are using a constraint, you should use a name that indicates the original table's name and the constraint.</p>
Server	<p>Click the Server select button. In the Pick Server dialog box, choose a previously defined data source server, and click OK.</p> <p>If the Marketing Repository server is not listed as an option, create this server definition before continuing.</p>
Size	Not currently used. You can type the estimated number of records (rows) in the table. The default is 100.

Table 18. Table Fields

Field	Description
Table Name	<p>Type the name of the table to which you are mapping or linking, using this form: TableOwner.ActualTableName.</p> <p>The table name is case sensitive because supported platforms have different requirements. Use the following convention when typing table names:</p> <ul style="list-style-type: none"> ■ IBM DB2. The tableowner and table name should always be uppercase, for example, TABLEOWNER_NAME.TABLE_NAME. ■ Microsoft SQL Server. The tableowner is case sensitive, and the table name should always be uppercase, for example, tableowner_name.TABLE_NAME. If the table name is not uppercase, attribute synchronization fails. ■ ORACLE. The tableowner should always be uppercase. The table name case does not matter. For example, TABLEOWNER_NAME.TABLE_NAME, or TABLEOWNER_NAME.table_name. <p>If you want to create union or partition tables, see “Understanding Partition and Union Tables” on page 85.</p>
Table Type	<p>Choose the Table Type from the list of values. Options are Regular, Union, or Analytic Adapters.</p> <p>Most tables will be of type Regular.</p> <p>Use Union tables only if you are partitioning large tables. For more information on creating union tables, see “Understanding Partition and Union Tables” on page 85.</p> <p>Analytic Adapter tables have a specific structure that accommodates data import from a third-party analysis tool. When you load tables using the Analytic Adapters view, only tables of type Analytic Adapter appear in the Analytic Adapters view list. For more details, see “About Analytic Adapters” on page 67.</p> <p>You cannot change the table type after the table is saved.</p>

Understanding Partition and Union Tables

In large data warehouses, tables can grow to an unmanageable size. Typically, this occurs with tables containing transaction data that expands over time. You can use the following table types to manage table size:

- **Partition tables.** Large tables can be divided into smaller tables (partitioned) to improve performance. Partition tables can be individually accessed.
- **Union tables.** Tables created to logically (not physically) reconnect the partition tables.

Union tables cannot be used as pass-through tables. You use information in pass-through tables to join one table to another but you cannot use any of the union table's data in your list. For example, you have three tables labeled A-C-D. Table C is a union table. If you need to use data from table C in your list, you cannot use table C as a pass-through table. You must select a different pass-through table, perhaps one of the partitioned tables in your union table.

Consider the following guidelines when creating union tables:

- **Have identical common fields.** The partition tables must have common fields for you to include those fields in a union table. Therefore, the reference name, expression, data type, and data size for each field must be identical across partitions. The comparison process is case sensitive. For example, the expression AAA would be evaluated differently than the expression Aaa.

CAUTION: Some tasks will fail if Marketing cannot use the Merge method with union tables. For additional information, see [“Understanding Joins” on page 103](#) and [“Designing Customer Hierarchies” on page 96](#).

- **Use at least two tables.** You can create a union table that has only one partition table. However, the purpose of creating a union table is to join two or more partition tables.

The following examples illustrate union table rules.

Example 1. You want to create a union table that uses three partition tables. Because the five fields in each partition table are identical, the union table contains the five fields.

Partition 1	Partition 2	Partition 3	Union
Field1	Field1	Field1	Field1
Field2	Field2	Field2	Field2
Field3	Field3	Field3	Field3
Field4	Field4	Field4	Field4
Field5	Field5	Field5	Field5

Example 2. You want to create a union table using partition tables that have no common fields. The union table contains no fields.

Partition 1	Partition 2	Union
Field1	Field6	
Field2	Field7	
Field3	Field8	
Field4	Field9	
Field5	Field10	

Example 3. You want to create a union table using three partition tables. Examples 1 and 3 have common fields. However, because Example 2 fields are not identical, the union table contains no fields.

Partition 1	Partition 2	Partition 3	Union
Field1	Field6	Field1	
Field2	Field7	Field2	
Field3	Field8	Field3	

Partition 1	Partition 2	Partition 3	Union
Field4	Field9	Field4	
Field5	Field10	Field5	

Example 4. You want to create a union table using three partition tables. The tables have some fields which are identical, and others that are not. The fields that are identical across the three tables are included in the union table.

Partition 1	Partition 2	Partition 3	Union
Field1	Field1	Field1	Field1
Field2	Field7	Field2	
Field3	Field8	Field3	
Field4	Field4	Field4	Field4
Field5	Field10	Field5	

Example 5. You are editing partition tables and plan to create a new union table. You add a new field to each partition table. However, the fields are not identical. The new union table reflects no changes from the old union table.

Old Union	Partition 1	Partition 2	New Union
Field1	Field1	Field1	Field1
Field2	Field2	Field2	Field2
Field3	Field3	Field3	Field3
Field4	Field4	Field4	Field4
Field5	Field5	Field5	Field5
	Field6	Field7	

Example 6. You are editing partition tables and plan to create a new union table. You add a new field to each partition table, and the fields are identical. The new union table reflects the addition of the new field.

Old Union	Partition 1	Partition 2	New Union
Field1	Field1	Field1	Field1
Field2	Field2	Field2	Field2
Field3	Field3	Field3	Field3
Field4	Field4	Field4	Field4
Field5	Field5	Field5	Field5
	Field6	Field6	Field6

Creating Union and Partition Tables

Use the Partition Tables view to associate partition tables to a union table you have created. When you partition transaction data, you typically choose a date field as the partition field. This method allows you to create separate tables for data such as time periods (1999, 2000, 2001). Some companies need to partition by months and even weeks to keep tables at a manageable size.

- Create the partition tables as you would any other table, with the table Type as Regular. If required, apply a constraint statement to the table (for example, `CUSTOMER_ID < '1004000402'`) to restrict the records accessed in that partition.
- When creating partition tables, use the description field to indicate that these records are partition tables. For example, you might use Transactions Partition 1 as the description for one partition table and Transactions Partition 2 as the description for another.
- When creating a union table, designate the table as a union table by choosing Union as the type. In this case, you do not need to specify a data source server or a table name. For a better understanding of the rules governing union tables, see [“Understanding Partition and Union Tables” on page 85](#).

- Table names for physical tables are typically in uppercase letters. To make the table names easier to identify, make only the first letter of each word in the union table name uppercase, for example, Transactions_All.
- If you modify the partition tables to add new fields, you can regenerate the union table by clicking Create Union Table again.

To create union tables with associated partition tables

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Partition Tables view tab.
- 3** To create the union table, in the top list, create a new record.
- 4** Set the table type to Union and complete other fields using [Table 18 on page 83](#) as a guide.
- 5** In the lower Partition Tables list, create a new record that you will use to associate the first partition table with the union table.
 - a** Create a new record.
 - b** Click the Reference Name select button.
 - c** In the Pick Tables dialog box, choose the partition table and click OK.

NOTE: Repeat [Step 5](#) to choose additional partition tables to associate with the union table.

- 6** In the lower Partition Tables list, click Create Union Table.

This action connects associated partition tables to the union table. The union table allows access to the fields in each partition table. The partition tables now behave as if they were in one physical table.

Working With Fields

When you add (map) a table to the Siebel Marketing Repository, you automatically have access to every field in the table as defined by the data source.

NOTE: Because some databases such as Oracle do not support Unicode characters in their table names, we cannot support Unicode characters in table names and field names in the Siebel Data Warehouse.

When you map a character field to a numeric field, you need to convert the character field to a numeric field. This can be done using the `to_number` attribute. For example, to map `substr(telephone,1,3)` to `SHORT` in the Fields view, you need to set the `to_number` attribute in Expression as follows:

```
to_number(substr(telephone,1,3))
```

CAUTION: If you do not convert these character fields, you might receive an error message (Error in Row).

The following topics are discussed in this section:

- [Retrieving Field Names During Data Mapping on page 90](#)
- [Maintaining Fields After Data Mapping on page 91](#)

Retrieving Field Names During Data Mapping

When you map a new table and save the record, the Data Dictionary Manager server process starts and retrieves the field names. This retrieval process only runs once, when the table record is initially created.

Troubleshooting During Field Name Retrieval

If you add a table and do not see any of its fields, either the table has no fields or an error has occurred in the Data Dictionary server process. Check the Data Dictionary Manager server log for reasons why the process failed. Possible errors include the following:

- **Table setup errors.** Make sure the case-sensitive tableowner and the table name are correct.
- **ODBC setup errors.** Make sure the server name, ODBC setup, case-sensitive password, and case-sensitive user ID are correct.

Maintaining Fields After Data Mapping

You can add and edit fields using the Fields list in the Tables view. You cannot delete a table (or its fields) once saved because other Siebel Marketing components may have established dependencies on the table and fields.

If a field's data type is inappropriate for its intended use, you can change its type. (Examples include Social Security numbers that appear as numeric fields instead of characters and dollar values that appear as characters when they should be numeric.) To maintain fields after initial data mapping, perform the following tasks:

- [Adding New Fields After Data Mapping](#)
- [Enabling Data Retrieval for Field Values on page 93](#)
- [Creating Virtual Fields Using Expressions on page 94](#)

For information specific to Marketing fields and Visual Segmentation, see [“Mapping Siebel Analytics Subject Areas” on page 115](#).

Adding New Fields After Data Mapping

When you add a new field to a table in the data warehouse, it does not automatically appear as a field in the corresponding Siebel Marketing table. You use the Fields view to add the field (or edit existing fields). The field that you add will be included in the table definition in the Marketing Repository.

To add a new field after data mapping

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2 Click the Tables view tab.
- 3 In the Tables list, select the table to which fields will be added.

The Fields list displays the fields associated with the selected table.

- 4 In the Fields list, create a new record.
- 5 Complete the necessary fields, using the following table as a guide.

Field	Comment
Data Retrieval Enabled	<p>This system field is blank as the default. A check mark appears in this field when Enable Data Retrieval is selected, and the field appears in the list in the Data Retrieval view with a label similar to the following:</p> <p>Accounts.LINE_OF_BUSINESS</p> <p>For more information, see “Enabling Data Retrieval for Field Values” on page 93.</p>
Data Type	<p>Choose the type of data this field contains from the list. The options are Char (alphabetic), and Double, Float, Long, and Short (numeric).</p> <p>The choice should reflect how the data will be used, not how it is designated in the data warehouse. For example, if the field holds ZIP Code or postal code information, it may be stored as numerical data. However, because you do not perform mathematical operations (add, subtract) with ZIP Codes, its type should be set to Char.</p> <p>Data from this field is automatically converted (if necessary) from its original type to the type specified.</p>
Description	<p>Type a description for the field. The description might include the range of values if the data type selected is different than the data type in the data warehouse.</p>
Expression	<p>Optional. Type an expression or use the default reference name.</p> <p>The maximum size for the expression is 512 bytes (characters). Date fields use a yyymmdd format and are bound to a character (8). For details, see “Creating Virtual Fields Using Expressions” on page 94.</p>
Reference Name	<p>Type a name for the new field. Maximum of 50 characters.</p>
Width	<p>This field is automatically populated when you select the field’s type. You can only edit the Width value if the Data Type is Char.</p>

- 6 Save the record.
- 7 In the Fields list, select the field and click Enable Data Retrieval.

Clicking this button retrieves a list of values associated with the field in your database. These values are available for use in segment and filter definitions. For more information, see [“Enabling Data Retrieval for Field Values.”](#)

Enabling Data Retrieval for Field Values

The Enable Data Retrieval function allows you to generate the list of distinct values associated with the field in a particular table. For example, a bank might want to create a hierarchy using a Region field.

When a table's field is selected (indicated by a check mark in the check box) and the Enable Data Retrieval button clicked, a one-level attribute hierarchy is created.

NOTE: Fields which contain values that have a width of more than 50 characters will be ignored when you click Enable Data Retrieval. You must shorten the invalid field name before attempting to retrieve data for these fields. During the validation process, a message notifies you that the field is invalid and asks if data retrieval should proceed with other valid fields. In addition, the combined total length of tablename.fieldname should not exceed 40 characters or data retrieval will fail for that field.

The one-level hierarchy is visible in the Data Retrieval list of records awaiting data retrieval (Marketing Administration > External Data Mapping > Data Retrieval view tab). When you select the one-level hierarchy in the Data Retrieval list, and click Retrieve Data, the results are available for selection in the Edit Segment view, and the Filters Detail view (Fields option). For more information, see [“Enabling Data Retrieval for Field Values”](#) on page 93 and [Chapter 9](#), “Defining Filter and Segment Criteria.”

You can set up data retrieval to occur automatically when you refresh your data warehouse. Using this feature, you can make sure that fields and attributes with volatile datasets are regularly synchronized with the Marketing Repository. For more information, see [“Automatic Data Retrieval”](#) on page 143.

Creating Virtual Fields Using Expressions

If you need a field that does not exist in the data warehouse but can be derived from an existing field, you can use the expression function to create virtual fields to provide data that is not explicitly available in your database. You can also use an expression to convert data, for example, converting nulls to strings.

Frequently, expressions are used to convert date information to character information. When you map or connect to a table that has a date field, the date field is automatically converted to a Long field using the following expression:

```
( { fn YEAR (DATE_FIELD) } * 10000) +  
( { fn MONTH (DATE_FIELD) } * 100) +  
( { fn DAYOFMONTH (DATE_FIELD) } )
```

NOTE: This particular expression returns a date formatted as YYYYMMDD.

You might also use this method to create a new virtual field that provides only the month or only the year.

You can create virtual field expressions by typing the expression in the Expression field on the Fields list tab in the Tables view. Using virtual fields you can build many kinds of new fields. The functions available to you are those provided by your ODBC driver, SQL, and your RDBMS.

When creating virtual fields, follow a consistent naming convention. For example, if you add a field based on an expression, make the first letter of each word uppercase (for example, Month, SSN, Year). Use uppercase letters for fields that exist in the data warehouse (with or without expressions). This method allows you to recognize which fields are from the data warehouse and which are virtual fields that you created using fields in the data warehouse.

About Customer Hierarchies

A customer hierarchy is a structure that you design for your data that is used to sort data. Customer Hierarchies allow the marketer to design segmentation and filter criteria that take advantage of relationships between individuals or organizations within the customer base. For example, a marketer may want to use a campaign to target individuals within a household or the household that contains several individuals. You can use the customer hierarchical structure to develop segmentation measures and set up custom functions that select customers based on aggregated data across any lower targeting levels of a hierarchy.

You create customer hierarchies to specify how you want to sort and organize information when it is extracted from the data warehouse. For example, a bank might create a hierarchy with customers as the primary targeting level (sort). Each customer most likely will have multiple accounts (second targeting level), and each account will have multiple months of transactions (third targeting level).

This Customer-Account hierarchy allows the bank to deliver a direct offer at the customer (primary) targeting level, or to decide that the best way to deliver an offer is by targeting specific accounts (second targeting level). Each banking customer has multiple accounts, and each account has multiple months of information. A measure might be created to target a customer based on the combined balances or transaction amounts across accounts.

By using Social Security number (SSN) and Account ID to identify customers and accounts, you can design measures that correspond to the targeting level. For an account-level measure, you can sort the data by Account IDs and calculate measures such as total deposits, average balance, minimum balance, and so on. For a customer-level measure, you can sort by SSN. Within the SSN group, you can sort by Account ID. The customer-level measures can then aggregate the data across multiple accounts, such as total balance, number of transactions, and so on. You can use those measures to create segment and filter criteria.

This section covers the following topics:

- [Designing Customer Hierarchies on page 96](#)
- [Creating Customer Hierarchies and Adding Targeting Levels on page 98](#)
- [Mapping Tables to Customer Hierarchies on page 100](#)

- [Understanding Joins on page 103](#)
- [Joining Tables and Fields on page 108](#)
- [Mapping Data for Visual Segmentation on page 115](#)

Designing Customer Hierarchies

Siebel Marketing allows you to design whatever hierarchy is most appropriate for the data in your data sources. You can set up multiple hierarchies to accommodate different customer categories or industry segments in which you may compete.

Using Siebel Marketing, you can define hierarchies of up to seven targeting levels. When presenting campaign offers, you can target the most appropriate level in the hierarchy, making sure that only one, consistent offer is delivered to the customer.

NOTE: You should design and implement customer hierarchies before creating any measures, because some measures may be specific to a customer hierarchy.

Before creating your customer hierarchies in Siebel Marketing, you should analyze your needs and design the hierarchical structure. For example, you might want the following structure to target customers by location:

First Targeting Level	Second Targeting Level	Third Targeting Level	Fourth Targeting Level	Field
Country				
	State or Province			
		City		
			Street Address	Zip Code or Postal Code

- A country can contain many states or provinces, cities, street addresses, and postal codes.

- A state or province can contain many cities, street addresses, and postal codes.
- A city can contain many street addresses and postal codes.
- A street address can have only one postal code.

To design a customer hierarchy

- 1** Determine the customer hierarchies you need by identifying the ways you and others want to sort your data and the types of aggregations you need.

Each customer hierarchy must have at least one targeting level and can have a maximum of seven.

- 2** For each customer hierarchy, define the primary sort (first targeting level), the secondary sort (second targeting level), and so on.
 - a** First define the lowest targeting level in your hierarchy. The lowest level has a one-to-one relationship to your data. There can only be one unique value for a particular record. For example, a street address can have only one postal code.
 - b** Define the highest targeting level in your hierarchy. The highest level has the highest one-to-many relationship to your data. Many records can have this value. For example, in an address record, the highest sort might be based on country.
 - c** Define targeting levels in between the lowest and highest in your hierarchy. These levels have a one-to-many relationship to your data.
- 3** For each targeting level, identify which tables and fields hold the data on which you need to sort. Each level must be associated with one or more tables and fields.

For a sample hierarchy design with multiple customer hierarchies, see [Table 19 on page 100](#).

Creating Customer Hierarchies and Adding Targeting Levels

Each targeting level of a customer hierarchy corresponds to a unique identifier in the database that identifies each entity. These unique identifiers are referred to as keys. Keys are the basis on which the data will be sorted for aggregation and retrieval.

For example, a marketing manager for an energy company may want data at the household targeting level. The household may have gas, electric, or oil accounts, but for its upsell marketing campaign, the manager decides to combine a number of offers in one direct mail campaign, targeted at the head of a household. Unique identifiers might include Household ID, Account ID, and Individual ID (for the head of household).

Depending on the available data, the manager might attempt to map to certain tables and fields to help identify the head of household contact. These fields might include:

- Number of years the account has been in existence (Example: YEARS_ACCT)
- The contact's title (Example: TITLE)
- The contact's gender (Example: GENDER)
- Which account within the household was the first to be established (Example: LOWEST_ROW_ID or lowest BASE_ROW_ID)

You can set a customer hierarchy and targeting level as default values for the application. If you do this, and then create a new source code format, new campaign load mapping, new output file layout, new segment, or new program, the Customer Hierarchy and Targeting Level fields in these new records will be populated with the default customer hierarchy, and default targeting level.

To create customer hierarchies and add targeting levels, perform the following tasks:

- [Creating Customer Hierarchies on page 99](#)
- [Adding Targeting Levels to a Customer Hierarchy on page 99](#)

Creating Customer Hierarchies

You create customer hierarchies to specify how you want data sorted and organized when data is extracted from the data warehouse.

To create a customer hierarchy

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Customer Hierarchies.
- 2 In the Customer Hierarchies list and create a new record.
- 3 Type a name and description for the customer hierarchy.
- 4 Select the check box in the Default column if you want it to be the default customer hierarchy.

NOTE: There can only be only one default customer hierarchy at a time.

For data integrity reasons, you cannot delete a customer hierarchy after it is saved.

Adding Targeting Levels to a Customer Hierarchy

The targeting level determines the availability of tables when mapping. Every table is available for the first level, but subsequent levels include only tables from the Parent level immediately above it. You can define as many as seven levels.

The order in which you add a level determines its sequence. If you want to reorder levels after you have saved the record, delete every level and add each level again in the correct sequence.

To add targeting levels to a customer hierarchy

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Customer Hierarchies.
- 2 In the Customer Hierarchies list, select the hierarchy.
- 3 In the Targeting Levels list, create a new record.
 - a In the new record, type a name and description for the level.

- b** Select the check box in the Default column if you want it to be the default targeting level.

NOTE: There can only be one default targeting level at a time.

Mapping Tables to Customer Hierarchies

Siebel Marketing constrains access to tables and fields using the following rules:

- The first (primary) targeting level in a customer hierarchy can map to any table in the data source (provided it has the customer key for the primary level).
- Successive targeting levels of the hierarchy can only map to tables that were also included in the level above it.

See sample customer hierarchy in [Table 19](#).

Table 19. Sample Customer Hierarchy Design

Customer Hierarchy Name	Levels	Tables	Fields
Account hierarchy	Account (primary level)	ACCOUNT	ACCOUNT_ID
		TRANSACTIONS	ACCOUNT_ID
		DEMOGRAPHICS	SSN
		SUMMARY	ACCOUNT_ID
SSN/Account hierarchy	SSN (primary level)	ACCOUNT	SSN
		DEMOGRAPHICS	SSN
		TRANSACTIONS	SSN
		SUMMARY	SSN
	Account (secondary level)	ACCOUNT	ACCOUNT_ID
		TRANSACTIONS	ACCOUNT_ID
		SUMMARY	ACCOUNT_ID

Use the following guidelines when selecting tables to map to each level of the customer hierarchy:

- Locate each table that holds the identifier for the primary level (Key 1), and map those tables to the primary level. In [Table 19](#), these tables include Account, Demographics, Transactions and Summary.
- Determine which of the tables also contain the second level identifier (Key 2) and map those tables to the second level.
- Continue this process for lower levels of the hierarchy if required, making sure that any tables mapped to a level consist only of tables included in the level immediately above it.

CAUTION: You must create the appropriate caching settings for the joins between fields that you map to the customer hierarchy. If settings are incorrect, some tasks will fail. For additional information, see [“Guidelines for Caching” on page 109](#).

To map tables to customer hierarchies, perform the following tasks:

- [Mapping an Existing Table to Customer Hierarchies](#)
- [Mapping a New Table to Customer Hierarchies on page 102](#)

Mapping an Existing Table to Customer Hierarchies

If you add new tables at a later date, follow the instructions in [“Mapping a New Table to Customer Hierarchies” on page 102](#) before mapping the customer hierarchies.

To map tables and fields to a targeting level

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Customer Hierarchies.
- 2 In the Customer Hierarchies list, choose a customer hierarchy record.
- 3 In the Targeting Levels list, select a level from within the hierarchy.
- 4 In the Mapping list, create a new record.

- 5** Complete the fields.
 - a** In the new record, click the Table select button, select the table to be mapped, and click OK.
 - b** Click the Field select button, select the field to be mapped, and click OK.
 - c** If the physical table contains sorted data, select the Presorted check box.

NOTE: Data needs to be sorted for some processes that are performed in the background, for example, aggregating measures. If you know that the data has been sorted in the data source, check the Presorted check box and the Marketing Server will not sort the data again. If you are not sure, leave the check box blank and the Marketing Server will sort the data. Presorted can only be selected for the first level of the hierarchy.

Repeat [Step 1](#) through [Step 5](#) for each level in the Levels list.

Mapping a New Table to Customer Hierarchies

When you add new tables to your data warehouse, you may need to map them to existing targeting levels.

If a new table has a field that can supply sorting information, use the Customer Hierarchies view to determine to which targeting level the table should be mapped. At a minimum, the table must be mapped to the primary (top) level of that customer hierarchy. Then, follow the instructions in [“Mapping an Existing Table to Customer Hierarchies” on page 101](#).

Understanding Joins

Siebel Marketing can retrieve data from multiple RDBMS tables. To extract and process this data, the Marketing Server must be able to associate and merge related data from these data sources into Siebel Repository tables and fields.

Joins allow Siebel Marketing to match and combine records. Siebel Marketing joins work like those in any true relational database. Records from two tables are merged when join keys match in each table. Although tables in your RDBMS have defined joins, you also need to define joins in Siebel Marketing. Siebel Marketing uses its own join definitions because the Marketing Server can join tables across separate RDBMS data sources that do not share the same physical database.

The Marketing Server decides which of three join methods to use to retrieve data from mapped tables. The join method selected depends on whether the join fields are also mapped to the customer hierarchy. The Siebel Marketing Server applies rules in the following order to determine the method it will use to retrieve data. Usually, merge joins and cache joins provide much better performance than nested loop joins.

- **Merge.** When customer hierarchy mappings are consistent with joined fields, the server uses the merge method, even if the cache flag is turned on.

For example, when you have two tables (Table1 and Table2), the Marketing Server will use the join method if the following conditions are satisfied:

- The join key value from Table1 matches the join key value from Table2.
- Both the join key value from Table1 and the join key value from Table2 are in the customer hierarchy.

If one of the fields is not in the customer hierarchy, the Marketing Server will not use the Merge method.

- **Cache.** If the Merge rule is not true and you turn on the cache flag for the join, the server will cache (read into memory) the child table.
- **Nested loop.** If the cache rule is not true, the server uses the nested loop method. This method is only used when Merge and Cache do not apply. The nested loop method should be avoided to prevent performance slow downs, especially for large tables or when joining tables without indexes.

For more information about joins, see the following topics:

- [Parent and Child Joins](#)
- [Categories of Joins in Siebel Marketing on page 105](#)

Parent and Child Joins

When you establish a join, you define a connection between two tables. One table is the parent and the other table is the child. You connect the parent table to the child table using at least one field that they have in common. By defining these join pairs, you can connect each of the relevant tables in your data warehouse. A join connection can be unidirectional or bidirectional. This section describes unidirectional and bidirectional joins.

- **Unidirectional join connection.** By default, each join record in the Marketing Repository is a unidirectional join. The Marketing Server retrieves child information when it queries a parent record, but will not retrieve parent information when it queries a child record. This is the default behavior of a join in the Marketing Repository.

Figure 3 shows an example of unidirectional joins between four tables. Tables B and C are child tables when connected to A and are parent tables when connected to D.

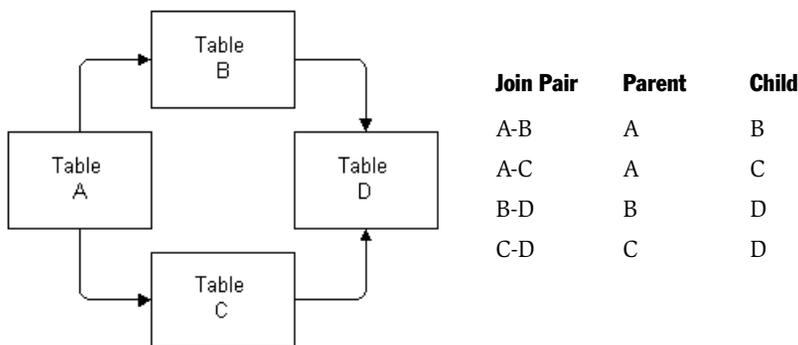


Figure 3. Sample Table Joins

- **Bidirectional join connection.** Most table joins in your physical database can be bidirectional. To create a bidirectional join in Siebel Marketing, you need to define two joins, one in which A is the parent and B is the child, the other in which B is the parent and A is the child.

Categories of Joins in Siebel Marketing

There are three categories of joins in Siebel Marketing:

- **Table joins.** Most joins are table joins.
- **Start point joins.** Used by the Marketing Server to perform queries.
- **Attribute joins.** Created automatically by the Marketing Server during data retrieval.

To create a join, see [“To create a new join between two tables” on page 109](#).

Using Table Joins

Table joins define the relationships among the tables in selected data sources and are created by the Marketing Administrator in the Marketing Administration screen. For more information, see [“Joining Tables and Fields” on page 108](#).

Using Start Point Joins

To extract data from the target data source, the Marketing Server needs to know the tables that are the starting points from which it will get to other tables. In a start point join, the parent table is null and the child table is flagged as a candidate to be the first table to start joining during a snapshot build or data synchronization. The application server needs at least one start point in the system. Typically every table that has a field enabled for data retrieval or has a field used as a base field in an attribute family should have a start point defined on it. This is a table that is usually needed for a campaign snapshot build (example: master customer table)

During a snapshot or data retrieval task, the Marketing Server may perform several separate queries accessing different groups of tables. During a query, if the Marketing Server cannot find a starting point, the table join might be ignored.

To extract data most efficiently, the Marketing Server uses the start points with the other joins to determine the paths required to retrieve data using the least effort. It checks every possible join path and its cost (weight) to select the best start point. For more information about the Cost parameter, see [“Using the Cost Parameter \(Advanced\)” on page 114](#).

Not every table is an appropriate starting point. The following are the basic guidelines for defining start points:

- If the table is always included in every query, a starting point should be created for that table. For example, the table containing Customer IDs might be the logical parent for other tables involved in the query, such as products owned, service requests, orders, and activity information.
- If you have defined any attribute families from a table, you should provide a start point for that table.

CAUTION: Do not associate a customer hierarchy with a start point join using the Customer Hierarchy field of the join. If you do, you will receive an error (No STARTPOINT specified on TABLE xxxxx) during data synchronization.

To create a start point join, see [“To create a new join between two tables” on page 109](#).

Using Attribute Joins

Attribute joins are created automatically by the Marketing Server during data retrieval used to create an attribute family. When the Marketing Server retrieves an attribute family, a system table is created in the Marketing Repository to hold the data values for each field in the family. As part of this process, the Marketing Server also creates the necessary join between this new attribute table and the existing tables. This new join is an Attribute Join.

The child table name of an attribute join contains the prefix Siebel.ATR. The fields in an attribute join record are read only, except for the join's Type field. You may change the join type and subsequent data retrieval will be based on the join type. For example, if the inner join should be changed to an outer join, you can make that change in the attribute join record.

NOTE: Attribute synchronization (data retrieval) never uses joins defined with customer hierarchies. For more information, see [“Retrieving Attribute Data” on page 138](#).

Joining Tables and Fields

Use the Joins view to create joins between two tables. Use the Queries drop-down list to filter the Joins list by table, attribute, or start point joins.

For more information about joining tables and fields, see the following topics:

- [Guidelines for Customer Hierarchies and Joins](#)
- [Guidelines for Caching](#)
- [Joining Tables on page 109](#)
- [Joining Fields on page 112](#)
- [Using the Cost Parameter \(Advanced\) on page 114](#)

Guidelines for Customer Hierarchies and Joins

Each join has an optional customer hierarchy field. This field only needs to be set in certain circumstances. Use the following guidelines for setting the Customer Hierarchy field on a join:

- Only use the Customer Hierarchy field when you create joins to multiple hierarchies. You would create two joins on the same table and specify which customer hierarchy to use for each one.
- Do not associate a customer hierarchy with any start point join that you created for data retrieval of an attribute family. This returns the following error in the MktgSrvr log file:

```
No STARTPOINT specified on TABLE XXXXX
```

- If you specify a customer hierarchy for a join, that join is restricted to that hierarchy. For example, if you specify customer hierarchy X for join A, join A will not be considered when the Marketing server evaluates the available joins to process customer hierarchy Y.

Guidelines for Caching

When defining joins, Siebel Marketing provides a Cache check box so that you can indicate if the table should be loaded into memory (cached) or accessed from a hard disk.

Use the following guidelines when deciding if you should cache a join.

- Do not load large tables into memory unless the server has sufficient physical RAM.
- Do not cache joins if the child table is mapped to the customer hierarchy. When a table is mapped to a hierarchy, the Marketing Server uses Merge functionality to retrieve the data.
- If the table is not mapped to a customer hierarchy and the table size is 10,000 rows and smaller, cache the join to reduce extract time.

Joining Tables

Use the following procedure to create joins between two tables.

To create a new join between two tables

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Joins view tab.

NOTE: To see more details, in the Joins list, select a join record and choose Details from the Show drop-down list.

- 3** In the Joins list, create a new record.

- 4 Complete the necessary fields using [Table 20](#) as a guide and save the join.

Table 20. Fields in the Joins View

Field	Comment
Cache	<p>Select this check box when the table should be loaded into memory or accessed off disk as necessary.</p> <p>To reduce extract time, cache small tables (10,000 rows and smaller). Do not load large tables into memory unless the server has sufficient physical RAM.</p>
Cardinality	<p>Cardinality is the ratio of occurrence of matching records between the two tables. This ratio helps the Siebel Marketing Server determine the fastest way to join the records.</p> <p>Select the cardinality between the parent and child tables from the list of values. Options are 1:N (one to many), 1:1 (one to one), N:N (many to many), and N:1 (many to one). The default is N:N.</p> <p>For example, if the join keys are SSN and ACCOUNT_ID and the parent table has one record for each SSN/ACCOUNT_ID while the child table has two records for any SSN/ACCOUNT_ID, this setting would be 1:N.</p> <p>In this case, the Siebel Marketing Server would scan for others after it has found one matching record.</p>
Child Table	<p>Click the Child Table select button. In the Pick Tables dialog box, select the Child table (the table to which the parent table will be joined). Click OK.</p>
Cost	<p>Type a cost value if you want the Siebel Marketing Server to evaluate which of two or more possible paths of joining tables is the most efficient. See “Using the Cost Parameter (Advanced)” on page 114.</p>
Customer Hierarchy	<p>If the join is specific to a particular customer hierarchy, click the Customer Hierarchy select button. In the Pick Customer Hierarchy dialog box, select the customer hierarchy from the list. Click OK. When you specify a customer hierarchy for a join, that join is restricted to that hierarchy.</p> <p>For example, you may wish to use a different join strategy for one type of customer hierarchy versus another. By making each join specific to a different customer hierarchy, the marketing administrator can indicate which strategy should be used. For additional information see, “Guidelines for Customer Hierarchies and Joins” on page 108.</p>

Table 20. Fields in the Joins View

Field	Comment
Hint (Show Details)	<p>(Optional) Type a hint statement if applicable. This field is only applicable to Oracle databases.</p> <p>Hint statements are passed on to the RDBMS through the SQL generated by the Marketing Server.</p> <p>Siebel Marketing includes these hints statements in the select statement against the child table. The following hints may be useful:</p> <ul style="list-style-type: none"> ■ /* + all rows*/ This statement bypasses any indexes. It is useful when caching a table. ■ /* + first rows*/ This statement forces the use of an index. It is useful when you are not using the cache, the table is large, and the rows you want to retrieve are already in a sorted index. ■ /* + parallel (fully qualified table name,1)*/ This statement invokes parallelism on the select statement. It is not necessary if parallelism is already enabled at the table level. <p>Do not invoke parallelism if tables are already physically stored in sorted order and you checked the Presorted option when mapping tables and fields. If you do invoke parallelism, the order will be incorrect because each thread delivers records when it can.</p>
Parent Table	<p>Click the Parent Table select button. In the Pick Tables dialog box, select the table that is the start point for the join. Click OK.</p> <p>For a start point join, leave this field blank.</p>

Table 20. Fields in the Joins View

Field	Comment
RDBMS Join (Show Details)	<p>Select this check box to display a check mark if you want the join to occur in the relational database management system (RDBMS) as opposed to the Marketing Server. The default is No (clear).</p> <p>By default the Siebel Marketing Server performs the joins (faster). In some cases, you might want to reduce extraction time by having your RDBMS perform the join.</p> <p>In general, you get the best extraction speed from RDBMS joins when joining to a large table but using a small percentage of its rows when using hierarchical attributes and filters.</p> <p>You must use Siebel Marketing joins if the two tables are not in the same RDBMS.</p>
Type	<p>Choose Outer or Equal (inner) as the join type.</p> <p>When Siebel Marketing Server cannot find a record in the child table that corresponds with a record in the parent table, it can either discard the row of data or keep it even though the row is incomplete.</p> <p>To accept only complete rows (data in both parent and child), choose Equal. To accept partial rows (data only in the parent), choose Outer. A choice of Outer usually results in joining more rows than choosing Equal.</p>

Joining Fields

Use the Fields list to specify a join's sequence, the parent and child fields, and the operator.

To join table fields

- 1 From the application-level menu, choose View > Site Map > Marketing Administration screen.
- 2 From the Show drop-down list, choose External Data Mapping.
- 3 Click the Joins view tab.
- 4 In the Joins list, select a join record.

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

A new row is added with a sequence number.

The read-only Sequence field displays the join order. Siebel Marketing adds a number 1 in the Sequence field to indicate this record is the first join field between the two tables. If the tables can be joined on multiple fields, make sure each join follows the same order as in the customer hierarchy.

For example, if the customer hierarchy has SSN as the first targeting level and Account_ID as the second, make the SSN join first and the Account_ID join second when joining tables that have both fields. This allows Siebel Marketing to perform a merge join between the two tables. For more information, see [“Understanding Joins” on page 103](#).

- 6 Complete the necessary fields.

NOTE: Joined fields should not be greater than 255 characters.

- a In the Parent Field field, click the select button.
- b In the Pick Fields dialog box, select a field from the list of fields available in the Parent table and click OK.
- c In the Child Field field, click the select button.
- d In the Pick Fields dialog box, select the corresponding join field from fields available in the Child table and click OK.
- e Choose a join type operator.

Available operators are =, <, >, <=, and >=.

The majority of joins use the = operator as the default. In this case, when the marketing server joins a row from the parent table, it looks for the same value in the child table.

Some joins use the >= operator. This operator is most commonly used with date data, where the parent field contains an event date and you want to join to child data that occurred after the parent event.

Using the Cost Parameter (Advanced)

You can use the join cost feature to influence the join path for marketing server queries. Each table join has an optional cost parameter. Cost is a unitless, relative number that the Marketing Server uses to calculate the most efficient query path. The Marketing Server selects the query path with the lowest total cost.

When multiple paths exist, the Siebel Marketing Server randomly selects one and runs a test query to compute the total cost of each path. Finally, the Marketing Server chooses the path with the lowest total cost and runs the full query.

You can exercise some control over this process by modifying the Cost parameter. Each table join has a Cost parameter (default 1000). If you want the Marketing Server to use a particular path, you can raise its cost or lower the cost of other paths.

To set the cost parameter

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Joins view tab.
- 3** In the Joins list, select the join record.
- 4** In the Joins Show drop-down list, choose Details.
- 5** In the Joins form, type the Cost value that meets your business needs.

Mapping Data for Visual Segmentation

Before using this section, you must install and set up Siebel Analytics. For details, see *Siebel Analytics Installation and Configuration Guide*. In addition, you should read through this chapter before attempting to set up Visual Segmentation. This section discusses Visual Segmentation exceptions to other instructions in this chapter. To complete other marketing administration requirements for tables such as customer hierarchies, joins, and field value data retrieval, use instructions in the appropriate sections of this chapter.

To map data for Visual Segmentation, perform the following tasks:

- [Mapping the Marketing Server to the Analytics Server](#)
- [Mapping Siebel Analytics Subject Areas](#)
- [Determining Analytics Criteria Setup Processes on page 116](#)

Mapping the Marketing Server to the Analytics Server

To perform this task, Siebel Analytics and Siebel Marketing must be installed and running.

To map the marketing server to the analytics server, you navigate to the External Data Mapping view in the Marketing Administration screen. In the Servers view tab, you create a new record for the marketing server of type Data Source and map it to the Siebel Analytics Server on which the subject area tables reside. For instructions, see [“Creating Server Definitions” on page 79](#).

Mapping Siebel Analytics Subject Areas

Each Analytics subject area that will be used by Visual Segmentation to create segments must be mapped as a Siebel Marketing table. To map Analytics subject areas to Marketing tables, you use the Marketing Administration screen's External Data Mapping view. For instructions, see [“Working With Tables” on page 81](#). See the following list for Visual Segmentation exceptions:

- In the Tables list, the Reference Name and the Table Name fields must exactly match the Siebel Analytics subject area name.

- In the Tables List, if the Analytics subject area name contains a space or a special character, the reference name and the table name must be enclosed in double quotes. See the following list for examples:

Subject Area Name	Reference Name	Table Name
Marketing	Marketing	Marketing
Marketing Data	"Marketing Data"	"Marketing Data"

- In the Fields list, if you add a new field manually, the reference field value must be enclosed in double quotes.

NOTE: You might want to add a new field after you import the Analytics table and its fields. New fields must be added manually in the Marketing Administration screen. For instructions, see ["Adding New Fields After Data Mapping" on page 91](#).

The following is a list of examples showing how to specify these names:

New Field Name	Reference Name
Household.Age	"Household"."Age"
Household.Age.Group	"Household"."Age"."Group"
Income	"Income"
Income Range	"Income Range"

Determining Analytics Criteria Setup Processes

Siebel Marketing uses Siebel Analytics to create segments by matching each analytics criterion to a Marketing field or a custom measure. The following is a list of the two setup processes:

- **Enable a field for retrieval.** To make it possible for an analytics criterion to match a field, you must enable the field for retrieval.
- **Set up a custom measure.** To allow an analytics criterion to match a custom measure, you must set up the custom measure.

This section provides guidelines to help you determine the appropriate setup process for each criterion. Perform following tasks:

- Identify the data type and SQL operator for each criterion.
- Use [Table 21](#) to determine the setup task you should perform.

NOTE: The combinations of data types and SQL operators shown in [Table 21](#) are the only combinations supported for Visual Segmentation.

Table 21. Supported Data Types and SQL Operators

Criterion Data Type	SQL Operator	Siebel Marketing Setup Task
Character	IN	Enable field for retrieval.
Character	=	Enable field for retrieval.
Character	Contains all	Enable Field for retrieval.
Character	Contains any	Enable Field for retrieval.
Character	Begins with	Enable Field for retrieval.
Character	Ends with	Enable Field for retrieval.
Character/Numeric	Is prompted	Enable field for retrieval or custom measure depending on use.
Numeric	IN	Enable field for retrieval.
Numeric	=	Set up custom measure.
Numeric	<	Set up custom measure.
Numeric	>	Set up custom measure.
Numeric	> =	Set up custom measure.
Numeric	< =	Set up custom measure.
Numeric	< >	Set up custom measure.
Numeric	BETWEEN	Set up custom measure.

Table 22 contains one example for each supported combination of data type and SQL operator.

Table 22. Examples of Supported Data Types and SQL Operators

Criteria in Siebel Analytics	Criteria Data Type	SQL Operator	Siebel Marketing Set Up Task
Gender IN ('Male, Unknown')	Character	IN	Gender must be enabled for data retrieval.
Gender = 'Male'	Character	=	Gender must be enabled for data retrieval.
Number of Children IN (1, 2, 3)	Numeric	IN	Number of Children must be enabled for data retrieval.
Income = 100000	Numeric	=	Set up a custom measure based on a bound measure on Income field.
Income < 100000	Numeric	<	Set up a custom measure based on a bound measure on Income field.
Income > 100000	Numeric	>	Set up a custom measure based on a bound measure on Income field.
Income > = 100000	Numeric	> =	Set up a custom measure based on a bound measure on Income field.
Income < = 100000	Numeric	< =	Set up a custom measure based on a bound measure on Income field.
Income < > 100000	Numeric	< >	Set up a custom measure based on a bound measure on Income field.
Income BETWEEN 100000 AND 200000	Numeric	BETWEEN	Set up a custom measure based on a bound measure on Income field.

Performing the Setup Processes

When you have determined the setup task, you perform one of the following setup processes:

Enabling the Fields for Data Retrieval. Use [“Enabling Data Retrieval for Field Values” on page 93](#) to enable fields for data retrieval.

Setting Up Custom Measures. Use [Chapter 6, “Creating Measures”](#) to create custom measures. Create the custom measures based on the following steps:

- 1 Define a bound measure on the field.
- 2 Determine the customer hierarchy and the targeting level for each segment in which the component will be used.
- 3 Determine the aggregate function to be used for each targeting level.

NOTE: Aggregate functions for custom measures depend on data in the field and other business requirements. For details, see [“Aggregation and Restrictions for Custom Measures”](#) on page 156.

- 4 Create a custom measure based on the bound measure for each of the targeting levels using the appropriate aggregate function.

The Description field for each custom measure must exactly match the Reference Name of the field used to define the underlying bound measure.

[Table 23](#) contains examples of setting up custom measures:

Table 23. Examples of Setting Up Custom Measures

Criteria	Customer Hierarchy	Fields enabled for Data retrieval	Bound Measures	Custom Measures	Custom Measure Description
"Gender" = 'Male' AND "Income" > 10000	Household > Individual	Gender	Income	<ul style="list-style-type: none"> ■ Income Sum by Household ■ Income Max by Individual 	Income
"Gender" IN ('Male', 'Unknown') AND "Number of Vehicles" > 3	Household > Individual	Gender	Number of Vehicles	<ul style="list-style-type: none"> ■ Number of Vehicle Max by Household ■ Number of Vehicles Max by Individual 	Number of Vehicles
"Income" > 10000 AND "Number of Vehicles" IN (1, 2, 3)	Household > Individual	Number of Vehicles	Income	<ul style="list-style-type: none"> ■ Income Sum By Household ■ Income Max by Individual 	Income

External Data Mapping

Mapping Data for Visual Segmentation

Defining Attributes and Buckets

5

Attributes are discrete variables that may be grouped, or rolled up, into collections of related information. Examples of attributes are geographical values (city, state, region) and time values (month, quarter, year). The data elements that make up attributes are derived from attribute tables in your data warehouse.

Creating a rollup is simply ordering attribute values so that you can segment the data at the highest level, or at any level in between. For example, ZIP Codes roll up into counties, counties roll up into states, and states roll up into regions and markets. You can group attributes into families, then order the values in each attribute family into different hierarchies for convenience and to make the data easier to select for segments, filters, and custom measure aggregations.

You use the attributes you build in Siebel Marketing for many purposes:

- To create groupings for time, demographics, and product data.
- To provide record filtering abilities (for example, only analyze customers who live in Michigan and have bought a specific product).
- To provide customer segmentation (for example, segment customers by account balance, resulting in mailings to customers who have a high or very high balance).

In Siebel Marketing, there are number of ways to group data values:

- **Buckets.** These are ranges of continuously varying numbers that reference measures, for example, high, medium, and low. For buckets, you create and produce counts based on the value of the measure. For example, a marketer creates a bound measure that is mapped to the ANNUAL_INCOME field in his company's Customers table, and derives numeric information from that field.

The marketer decides to group ranges of income into buckets and then count how many customers fall into each bucket. [Table 24](#) shows how annual income data can be divided into distinct ranges. Siebel Marketing calculates the total balance for each household, determines the qualifying bucket for the household, and adds one to the count for that bucket.

Table 24. Measure: Total Balance by Household

Buckets	Definition
Low	< \$20,000
Medium	Between \$20,000 and \$50,000
High	Between \$50,001 and \$100,000
Very High	> \$100,000

- **Attribute Families.** Logical families of related data mapped from fields in a table.

Attribute families are unordered collections of related information that are used as the basis for building attribute hierarchies. Each attribute family can have a number of attributes, and each attribute, a number of values.

Like buckets, attribute families are mapped to a base table and field in your database.

- Buckets reference a measure that is mapped to a numeric database field.
- Attribute families provide a loose structure for individual attributes that reference and derive information from other alphanumeric fields in your database.

For example, a retail marketer wants to group account data to track how many accounts were opened in certain time periods. The marketer creates an attribute family called Date Opened and maps the attribute family to the Accounts table in his database and the DATE_OPENED field in the table. The marketer decides to set up quarterly, yearly, and two-year ranges for the data.

Within the attribute family, the marketer creates the three attributes and defines values for each, as [Table 25](#) illustrates. Attributes are mapped to the accounts table and DATE_OPENED field.

Although these data elements are assigned to an attribute family, the marketer can organize the individual attributes in a number of different ways using attribute hierarchies.

Table 25. Date Opened Attribute Family with Values

Attribute Family	Attributes	Labels	Value
Date Opened	Yearly	1995	Between 19950101 and 19951231
		1996	Between 19960101 and 19961231
		1997	Between 19970101 and 19971231
		1998	Between 19980101 and 19981231
		1999	Between 19990101 and 19991231
		2000	Between 20000101 and 20001231
	Two-Year Periods	Period 1	Between 19950101 and 19961231
		Period 2	Between 19970101 and 19981231
		Period 3	Between 19990101 and 20001231
	Quarterly	Q1 1995	Between 19950101 and 19950331
		Q2 1995	Between 19950401 and 19950630
		Q3 1995	Between 19950701 and 19950930
		Q4 1995	Between 19951001 and 19951231

- **Attribute Hierarchies.** These are used to order the various attribute values found in attribute families.

Attribute Hierarchies allow you to look at your data in different ways by allowing you to create distinctive rankings, or hierarchies, using mapped, unordered attributes of an Attribute Family.

Using the previous example, the attributes in the Date Opened attribute family might be arranged in a hierarchy with two-year periods, yearly, and quarterly as successive levels. The hierarchy levels also might be arranged as quarterly, yearly, and two-year periods. An attribute hierarchy can have up to nine levels.

A retail marketer might design different hierarchies using the attributes in the Products attribute family. Individual attributes such as Product, Category, Brand, and Size might be arranged in hierarchy levels such as Category, Brand, Product, Size, or Brand, Product, Size, Category, and so on. Four data elements in an attribute family can be arranged into 64 different hierarchies.

When attributes are arranged in a hierarchy, they form rollups.

Using a bank as an example, if the hierarchy is State, Region, and ZIP Code, the measures (Number of ATMs and Number of Tellers) that can be calculated for the ZIP Code roll up to provide a total for the Region, and the Regions roll up to provide a total for the State, as shown in [Table 26](#).

Table 26. State, Region, and ZIP Code Rollup

State	Region	ZIP Code	Number of ATMs	Number of Tellers
Virginia			14	104
	North		8	64
		20148	2	7
		20191	4	35
		20215	2	22
	South		6	40
		20451	2	12
		20476	1	8
		20497	3	20

ZIP Codes roll up to Region ($12 + 8 + 20 = 40$ for the South and $7 + 35 + 22 = 64$ for the North). Regions roll up to the state level ($64 + 40 = 104$).

You can create as many rollups as needed. For example, even though the data warehouse may not have an attribute for All States, you can create a rollup that combines the information from every state to give you the total you need.

Defining Bucket Values

The Buckets view allows you to assign a range of values or attributes to existing measures. This view displays previously defined buckets of values, and provides a means to define the range of each bucket, using the Values list.

To create buckets

- 1 From the application-level menu, choose View > Site Map > Marketing Administration screen, and from the Show drop-down list, choose Buckets.
- 2 In the Buckets list, create a new record.
- 3 Complete the necessary fields.
 - a Type a name for the bucket and a description of the bucket's range of values.
 - b Click the Measure select button.
 - c In the Pick Measure dialog box, choose a measure from the list of previously defined bound and custom measures and click OK.

The read-only Measure Type field is filled in automatically.

To create values for the bucket

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Buckets.
- 2 In the Buckets list, select a bucket record.
- 3 In the Values list, create a new record.
- 4 Complete the necessary fields, using the following table as a guide.

Field	Comment
Code	Type up to 50 characters to be used as a code for the value. For example, <i>LOW</i> (code) might have a value of between 0 and 10,000.
First Value	Type a numerical value, up to 75 characters long. For example, <i>LOW</i> might have a value of between 0 (first value) and 10,000.

Field	Comment
Label	Type up to 75 characters as a label for the bucket value. Examples of labels are Low, Medium, High.
Operator	Choose an operator from the list. Options are =, <, >, <=, >=, BETWEEN. For example, LOW might have a value of <i>BETWEEN</i> (operator) 0 and 10,000.
Second Value	Type a second value, up to 75 characters, if the operator BETWEEN is used. Make sure that the values for BETWEEN are inclusive. For example, LOW might have a value of between 0 and 10,000 (second value).

- 5 Save the record after each value is defined.

Siebel Marketing automatically assigns a sequence number as each value is typed.

To change the sequence of a value

- Select a value and click Move Up and Move Down.
- Click the menu button and choose Resequence if a value is deleted and you want to resequence the remaining values.

Designing Buckets and Ranges of Values

When defining bucket values, be sure to cover every possible range, including negative numbers.

NOTE: You can create two buckets and overlap their values, but each record that qualifies for more than one bucket is assigned to the first one for which it qualifies, starting from the top to the bottom of the Values list.

Table 27 shows a flawed design of a bucket of values.

Table 27. Problem Bucket Design

Label	Code	Operator	Value
Low	L	Between	0 and 10
Medium	M	Between	11 and 20
High	H	Between	20 and 50
Special	S	=	13

This design has several flaws:

- **No provision for negative values.** A value of -5 fails to qualify for any bucket, and the data is lost.
- **No provision for high values.** The highest value for a bucket is 50. Values higher than 50 fail to qualify for any bucket.
- **There is a gap between 10 and 11.** The first bucket covers values up and including 10, and the second bucket covers values beginning with 11. If values are not whole numbers, (such as a value of 10.5), they do not qualify for any bucket. A value of 20 qualifies for both the Medium and High buckets, but the qualified value is assigned to the Medium bucket because it is evaluated before the High bucket.
- **The Special bucket will never get any assignments.** The Medium bucket already covers the value of 13.

Table 28 illustrates a corrected design for a set of buckets:

Table 28. Corrected Bucket Design

Label	Code	Operator	Value
Special	S	=	13
Low	L	< =	11

Table 28. Corrected Bucket Design

Label	Code	Operator	Value
Medium	M	Between	11 and 20
High	H	>	20

Building Rollups for Buckets

Frequently, you need to have both a set of buckets and a total for the bucket values. To create a rollup, you have to construct a bucket that uses the same base measure as the original. Verify that this rollup has one bucket that encompasses every possible value the base variable may have. You can use one of the following two methods for making one bucket cover all values:

- If the base measure is likely to return only positive numbers, use ≥ 0 (greater than or equal to zero). If you prefer, you might replace the zero with a negative number, for example, -99.
- The other method is to choose an unlikely value for the measure and use the \neq (not equal to) operator. For example, Account Balance returns a value with dollars and cents. Thus, -0.001 is an unlikely value because of the number of digits after the decimal point. By setting the bucket to $\neq -0.001$, the bucket should catch all records.

Defining Attribute Families

Use the Attribute Families view to define, map, and build attribute families with attributes. The attributes in attribute families can be used to create attribute hierarchies. Using this view, you map every attribute to a data warehouse base table (primary table) and a base field, then create multiple attribute hierarchies using some or all of the attributes. The base field corresponds to the set of unique values at the lowest level of the Attribute Family.

The Attribute Families list displays available attribute families, every attribute member defined within the attribute family, and the associated table and field mappings. Create user-defined labels as an alternative when labels for an attribute level need to be defined manually. You can create an unlimited number of labels.

To create attribute Families

- 1** From the application-level menu, choose View > Site Map > Marketing Administration screen.
- 2** In the Attribute Families list, create a new record.
- 3** Complete the necessary fields using the table at the end of this procedure as a guide.

When you save the record, the new record appears in the Attribute Families list.

- 4** In the Attribute Families list, select the attribute family for data retrieval.
Use SHIFT select or CTRL select to choose more than one Attribute Family for data retrieval.
- 5** Click Retrieve Data.
- 6** In the Pick Start Time dialog box, click the field's arrow button.

- 7** Use the calendar controls to choose a date and the time for the Retrieve Data job and click OK.

A validation process begins to ascertain each attribute in the list contains values in the Label Table and Label Field fields. If there are no values in these fields, validation checks for records in the user-defined labels list for the attribute.

If validation fails, the attribute family's Data Retrieval Required field will contain a Y (Yes), and the Last Data Retrieval and Size fields will contain no values.

Field	Comment
Base Field	<p>Click the Base Field select button. In the Pick Fields dialog box, select the base field from the list of fields in the selected table.</p> <p>The base field should be the lowest level of the attribute hierarchy. For example, if a time-based hierarchy has levels of Years, Weeks, and Days, select Day as the base field.</p> <p>The base field should be a field that is unlikely to have duplicate values and can be joined to.</p> <p>The field width accommodates a maximum of 50 characters.</p>
Base Table	<p>Click the Base Table select button. In the Pick Tables dialog box, select the table and click OK.</p> <p>The base table contains the base field for the attributes in this family. An example would be a time table with a day field.</p> <p>A start-point join must exist for the base table for it to be retrieved.</p>

Defining Attributes and Buckets

Defining Attribute Families

Field	Comment
Data Retrieval Required (Yes/No)	<p>This system-monitored and automatically populated field indicates whether an attribute data retrieval (rebuild) is required.</p> <p>Data Retrieval is required if:</p> <ul style="list-style-type: none">■ A new attribute family is added.■ A new attribute member is added to an existing attribute family, or attribute elements are changed.■ A new attribute hierarchy is added that uses this attribute family.■ An attribute hierarchy which uses this attribute family is deleted.■ An attribute hierarchy using this attribute family is modified (levels added or deleted, or a change is made to the rollup).
Description	(Optional) Type a description of the attribute family's properties.
Last Data Retrieval	This field contains the date of the last attribute data retrieval (rebuild).
Name	Type a unique name for the attribute family.
Number of Attributes	The number of attributes defined in the attribute family is automatically generated in this field when data retrieval is completed.
Size	The number of unique values in the data source for the attribute family. This field is automatically filled in after an attribute build.

Adding Attributes to Attribute Families

For each attribute you want to include in the attribute family, you need to identify the table and field that holds the attribute. Then you should map to a descriptive label or create one in the User Defined Labels list. The Attributes list displays every attribute defined within a table and associated mappings to tables and fields.

NOTE: For data integrity reasons, you cannot delete attribute members after an attribute family is saved. Instead, create a new attribute family with only those attributes you want to include.

To add attributes to an attribute family

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Attributes.
- 2** In the Attribute Families list, select the attribute family.
- 3** In the Attributes list, create a new record.
- 4** Complete the necessary fields, using the table at the end of this procedure as a guide.
- 5** Save the record after you define each attribute member.

Repeat this procedure until every member of the attribute family has been defined.

Field	Comment
Code Field	Click the Code Field select button. In the Pick Fields dialog box, select the field from the list of fields in the selected code table. Click OK. The code field allows a maximum of 50 characters.
Code Table	This field is automatically populated using the base table specified for the attribute family.

Field	Comment
Label Field	<p>(Optional) Leave this field blank if you are creating user-defined labels.</p> <p>To add a label field:</p> <p>Click the Label Field select button. In the Pick Fields dialog box, select the label field from the list of fields in the code table.</p> <p>The label field allows a maximum of 75 characters.</p>
Label Table	<p>(Optional) Leave this field blank if you are creating user-defined labels.</p> <p>If you map a label field and define additional labels using the User Defined Labels list, the labels that are mapped take precedence. You cannot create user-defined labels for fields that are mapped.</p> <p>To add a label table:</p> <p>Click the Label Table select button. In the Pick Tables dialog box, select the table. Click OK.</p>
Name	Type a name for the attribute member.

Creating User-Defined Attribute Labels

Attributes must have labels (understandable explanatory text), which identify the attribute's value. For some attributes, the Code field is acceptable as a label, for example, values for Country, Province, and City. Labels for other attributes might need to be relabeled to more clearly identify the field for the end user. To define a label for the attribute, map to existing labels using the fields in the Attributes list, or create new labels in the User Defined Labels list.

In a user-defined label record, it is recommended that you set up a one-to-one relationship between the value in the Label field and the Code field. Siebel Marketing identifies every label using the Code field so that when a label is changed, the label value is not deleted from the system during resynchronization of an attribute family. For example, a label value of Siebel has the code 01 and is used in segment or filter criteria. If you rename the label value to Siebel Systems and do not change the code (01), after the attribute family resynchronization, the Siebel label value automatically appears as Siebel Systems.

For example, to provide labels for the Marital Status attribute, you might connect to the Customers table, which has a field called Marital_Status. The values are 1, 2, 3, and 4. You know from a reference source that 1 means Single, 2 means Married, 3 means Divorced, and 4 means Widowed.

To create the attribute members, select the Customers table and the Marital_Status field for both the code table and code field. Then, create user-defined labels.

Use the guidelines in [Table 29](#) to help you determine when to use labels that exist in the data warehouse, and when to define new labels.

Table 29. When to Use Existing Labels or Create New Attribute Labels

If the Attribute...	Then...
Is already text (for example, a ZIP Code or a city name)	Choose the same table and field as the label (Attribute's Label Table and Label Field fields).
Is an alphabetic or numeric code that references a lookup table for its label (for example, the attribute Education is joined to a lookup table that provides several text descriptions for each education code)	Map to the lookup table and select the field that contains the text description (Attribute's Label Table and Label Field fields).
Is an alphabetic or numeric code for which there is no text description in your database (an example might be a credit rating, a flag value where zero stands for No and 1 stands for Yes)	Use the User Defined Labels list, add records and use the Label (name) and Value fields to provide a text description for each possible code the attribute might have.

To create user-defined labels

- 1** From the application-level menu, choose View > Site Map > Marketing Administration screen.
- 2** In the Attribute Families list, select an attribute family.
- 3** In the Attributes list, select an attribute belonging to the attribute family.
- 4** In the User Defined Labels list, create a new record.
- 5** Complete the fields for the labels, using the table at the end of this procedure as a guide.

- 6 Save the record after defining each label.

Field	Comment
Code	Type a short code for the label. For example, a code for Low Income might be LI.
Label	Type the text for the label, up to 75 characters.
Operator	Choose an operator from the list. Options are =, < >, <, >, < =, > =, and BETWEEN.
Value (First and Second)	Add the alphanumeric value that decodes the label. If the operator BETWEEN is used, add a second value. Multiple values can not be used in user-defined labels. You can not type values separated by a semicolon (;) in the values field. For example: User Defined Label: Sample Operator: = First Value: 0;1;2

Using the MARITAL_STATUS example, you might create user-defined labels as shown in [Table 30](#).

Table 30. Sample User-Defined Labels

Label	Code	Operator	Value
Single	S	=	1
Married	M	=	2
Divorced	W	=	3
Widowed	D	=	4

The STATUS value of 1 is now linked to the label Single, a STATUS of 2 to Married, and so on.

The label entries are evaluated in order. The top label, Single, is evaluated first and the bottom one, Divorced, is evaluated last. Make sure that each value qualifies for at least one entry.

In the User Defined Label Value field, you can type alphabetic characters in addition to numeric. For example, if the attribute contains letters such as Y or N, you can use the label to expand those values into Yes and No.

Because characters are valid entries, you should verify that numeric-style data is stored as numeric values. For example, a field called BRANCH_ID might be described as a character field, not a numeric field (integer, double and so on). If so, Siebel Marketing interprets it as a character entity. Thus, if North is defined as “Between 1 and 3,” the values of 20 and 200 would qualify as being between 1 and 3. If the data is stored as a character, you can use Siebel Marketing to convert the values to numerics.

You can put multiple values in a single line, separated by semicolons. As [Table 31](#) shows, a credit rating of A, C, or H qualifies as good credit.

Table 31. Multiple Values Separated by Semicolons

Label	Code	Operator	Values
Good	G	=	A;C;H

Trapping Unclean Data

Even the best data warehouse can have values that are outside the expected range. This is referred to as unclean data. In the `MARITAL_STATUS` example, possible values are 1 through 4. If the data is corrupt, values such as -2, -4.5, or 297 may exist.

To trap unclean data, you can create entries to trap the bad values, as shown in [Table 32](#).

Table 32. Creating Entries to Trap Data

Label	Code	Operator	Value
Single	S	=	1
Married	M	=	2
Divorced	D	=	3
Widowed	W	=	4
Negative Trap	NT	< =	0
Positive Trap	PT	> =	0

When you review your data, check the traps for data. If data is being captured, you should check the source data to locate and correct the unclean data.

Remember, data changes over time, and you may not have data in the traps the first time you extract information.

Retrieving Attribute Data

When you have finished defining attribute families, attributes, and user-defined labels, synchronize the new attributes with those in the data source's tables and fields using the Retrieve Data functionality.

Attribute families requiring synchronization display a Y (Yes) in the Data Retrieval field. You can initiate this task from the Attribute Families view or the Data Retrieval view by selecting the attribute family record and clicking Retrieve Data. For more information, see [“Data Retrieval” on page 142](#).

Creating Attribute Hierarchies

Use the Attribute Hierarchies view to create ordered groups of attributes based on defined attribute families and member attributes. The Attribute Hierarchies list displays the predefined hierarchies that are available to you. The Attribute Hierarchy Levels list shows the rollup of attribute levels within each hierarchy.

Attribute hierarchies are built in two stages. First, you define a hierarchy and specify the attribute family from which you will be drawing attributes. Then, you define a hierarchical order (sequence) of up to nine levels.

NOTE: Siebel Marketing does not prevent you from adding more than nine.

The benefit is that you can define an attribute family once, and from it create multiple attribute hierarchies with as many as nine levels. Each attribute level can occur only once in a hierarchy.

To create an attribute hierarchy

- 1** From the application-level menu, choose View > Site Map > Marketing Administration.
- 2** Click the Attribute Hierarchies view tab.
- 3** In the Attribute Hierarchies list, create a new record.
- 4** Complete the necessary fields, using the following list as a guide, and save the new hierarchy.

Field	Comment
Attribute Family	Click the Attribute Family select button. In the Pick Attribute Family dialog box, select the attribute family from the list. Click OK.
Description	(Optional) Type a description.
Filters	Click the Filters select button to view a read-only list of filters that use this attribute.

Field	Comment
Name	Type a unique name for the attribute hierarchy.
Number of Levels	This field is automatically completed when you pick hierarchy levels, and save the record.

To specify attribute levels in the hierarchy

- 1** From the application-level menu, choose View > Site Map > Marketing Administration.
- 2** Click the Attribute Hierarchies view tab.
- 3** In the Attribute Hierarchies list, select the hierarchy for which levels will be added.

- 4** In the Attribute Hierarchy Levels list, create a new record.

A new row appears, and the Sequence field automatically registers the order of the level.

- 5** In the Attribute Hierarchy Levels field, click the arrow and select an Attribute Level from the list.

The list includes available levels within the selected Attribute Family. Each Attribute Level can occur only once in an hierarchy.

Repeat this procedure to add additional levels in order. The levels appear in the order in which you add them.

To resequence levels

- On the Levels list, click Move Up and Move Down to adjust the sequence (order) of the level in the hierarchy.

Sequence numbers automatically reflect position changes.

- If you remove elements of a hierarchy, reorder the remaining attribute Levels sequentially before saving the record by clicking the menu button and choosing Resequence.

CAUTION: Deleting an attribute hierarchy also removes every reference to it, including segments and filters, from Siebel Marketing. Delete with care to avoid unintentional loss of data.

Data Retrieval

Attribute families and related fields must be periodically synchronized with actual attributes and fields in the data warehouse so that the number of entries in each attribute and field is accurate.

Use the Data Retrieval view to review database fields and attribute families in the system, and start the Retrieve Data (synchronization) task. For attribute families, you can perform this task from the Attribute Families view by selecting the record and clicking Retrieve Data.

NOTE: Attribute families that have been incorrectly created will not be submitted for data retrieval. Examples of incorrect setup for attribute families are attribute families with no attributes, and attributes with no label table and field and no user defined labels.

Resynchronizing Data and Retrieving Field Values

The Data Retrieval view provides information such as when the last data retrieval occurred, the number of attributes, the base table and field, and so on.

Data should be resynchronized (retrieved again) if attributes in an attribute family have changed, or if a list of values is needed for a database field. Use the following procedure:

To resynchronize attributes and get field values using data retrieval

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Data Retrieval view tab.
- 3** In the Data Retrieval list, select the record for which data retrieval or synchronization will be performed.

You can select multiple records for data retrieval by pressing CTRL or SHIFT and then selecting the records.

- 4 Click Retrieve Data to start the process.

The data retrieval task may take several seconds to several minutes to complete depending on the size of the data source.

To check data retrieval task status

- 1 From the application-level menu, choose View > Site Map > Server Administration > Servers.
- 2 Click the Server Tasks view tab.
- 3 In the Server Tasks list, locate the task and view its status in the Task State field.
- 4 Drill down on the Task ID hyperlink to view the task log.

Automatic Data Retrieval

You can set up data retrieval to occur automatically when you refresh your data warehouse. Using this feature, you can make sure that fields and attributes with volatile datasets are regularly synchronized with the Marketing Repository. After enabling automatic data retrieval, every time a new record is added to the ETL History table in the Siebel application, the Automatic Data Retrieval workflow process resynchronizes all attribute hierarchies.

NOTE: You can find the ETL History status for each load in the Diagnostics view of the Analytics Administration screen.

To enable automatic data retrieval

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2 Click the Data Retrieval view tab.
- 3 Select the field or attribute hierarchy.
- 4 In the Auto-Update field, select the check box.

The Automatic Data Retrieval workflow is invoked anytime you insert a new record in the ETL Result (S_ETL_RUN) table. The workflow calls the Attribute Resync Service as part of its process.

To invoke automatic data retrieval, perform the following two steps in the Business Process Administration screen after you deploy Siebel Marketing:

- In the Workflow Policy view, search for the Automatic Data Retrieval policy and set the expiration date to the date that you want the automatic data retrieval to run.
- Activate the Automatic Data Retrieval workflow process as discussed in [“Activating Workflow Processes” on page 44](#).

NOTE: This feature is only supported for Siebel customers that have deployed Siebel Analytics with the Siebel Data Warehouse.

Deleting List-of-Value Data for Fields

In the Tables and Fields view, the Enable Data Retrieval function allows you to create a list of values associated with a field in a particular table. If you select a table’s field and click Enable Data Retrieval, a list of values is created, and this list of values appears in the Data Retrieval list.

You can delete the record from the Data Retrieval list. Upon deletion, each reference to that record is removed and the check box in the Fields list is cleared. For more information, see [“Enabling Data Retrieval for Field Values” on page 93](#).

To cancel data retrieval for field values

- 1** From the application-level menu, choose View > Site Map > Marketing Administration screen, and from the Show drop-down list, select External Data Mapping.
- 2** Click the Data Retrieval view tab.
- 3** In the Data Retrieval list, select the record.
- 4** Click the menu button and choose Delete Record.

Measures provide a flexible and powerful way to define straightforward building blocks for use in segment design and launching campaigns. Measures can be based on a numeric value that is derived directly from your database (Bound Measures), calculated using other measures (Custom Measures), or drawn from database fields (List Measures).

Siebel Marketing's Measures views allow you to create, modify, or delete these measures, which are used as building blocks for buckets, filters, segments, and campaign load mappings.

This chapter covers how to create bound and custom measures. It also discusses how to use List Measures which reference alphanumeric database fields (such as name, address, customer key, and so on). Although list measures cannot be used in other measure definitions, they are applied when creating distribution lists of contacts, and when mapping to external contact data.

[Chapter 5, “Defining Attributes and Buckets”](#) explains how to define values for each measure. [Chapter 9, “Defining Filter and Segment Criteria”](#) explains how to use these measures in a segment definition.

When creating measures, you perform the following tasks:

- 1 Create Bound Measures by mapping to numeric fields in your database.** For more information, see [“Bound Measures” on page 147](#).
- 2 Use Bound Measures to perform calculations at any level in your customer hierarchy.** For more information, see [“Using Bound Measures in Calculations” on page 148](#).
- 3 Define Custom Measures with expression-type logic.** For more information, see [“Custom Measures” on page 149](#) and [“Building Custom Measure Expressions” on page 152](#).

- 4 Aggregate a custom measure, as applicable.** For more information, see [“About Aggregation Levels”](#) on page 157 and [“Adding an Aggregation Function”](#) on page 158.
- 5 Restrict the custom measure to a portion of the data.** For more information, see [“Adding Restrictions to Custom Measures”](#) on page 159.
- 6 Create List Measures for use in campaign load mappings and output file layouts.** For more information, see [“Defining List Measures”](#) on page 161.

Bound Measures

Bound measures are typically used for calculation or with other measures to create custom measures. Bound measures are mapped to, and derive information only from numeric database fields such as HOME_VALUE, ANNUAL_INCOME, CREDIT_RATING, and so on. For information about defining a measure on a character field, see [“Defining List Measures” on page 161](#).

NOTE: If you use a bound measure, records returned in the snapshot may be aggregated to other targeting levels of the customer hierarchy. The Marketing Server stores only one record for the targeting level in the snapshot. If you expect a field to have multiple values and you want to generate a record for each one, you should enable the field for data retrieval, create the segment using this field, and retrieve the information in this way. For additional information, see [Chapter 9, “Defining Filter and Segment Criteria.”](#)

Bound measures may be created in the All Measures view as well as the Bound Measures tabbed view. From the All Measures view, drill down on the measure’s name to open the measure-specific details view. Alternately, click the Bound Measures view tab to list every bound measure.

The Parent Measures list displays every custom measure that uses the selected bound measure. Drill down on the parent measure name to view details.

Creating Bound Measures

Use the following procedure to create bound measures.

To create bound measures

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Measures.
- 2** In the All Measures list, create a new record.
- 3** Complete the necessary fields.
 - a** Type a Name and Description for the measure.

The name field has a maximum length of 50 characters.

- b** In the Type field, choose Bound from the list.

The measure type automatically is set to bound if you are creating a measure from the Bound Measures view. If you are creating a measure from the All Measures list, set the measure type as bound.

- c** Click the Table select button.
- d** In the Pick Tables dialog box, choose a table and click OK.
- e** Click the Field select button.
- f** In the Pick Fields dialog box, choose the field from the table that the measure will reference and click OK.

The section [“Defining Bucket Values” on page 126](#) explains how to define buckets using a bound measure.

Using Bound Measures in Calculations

Bound measures are used for record-level computation or are included as part of a custom measure definition.

For example, a bank might want to create measures that help determine how many times a customer interacts with a teller for an account transaction, and then compute the number of teller transactions that have occurred at the household level.

A bank customer might have several accounts (checking, savings, money market, IRA, and so on). One household (defined here as a mailing address) can have several customers (husband, wife, children). The bank might set up the following one-to-many (1:M) customer hierarchy:

- Household (highest level)
- Customer (intermediate level)
- Account (lowest level)

Using measures, the bank can perform calculations to get numeric data at any of those levels. The bank can calculate how many teller transactions each single customer has by adding up the teller transactions for each of the customer's accounts. It can then determine how many teller transactions were performed at the household level by adding teller transactions by each customer in the household. The process of adding up from a lower level (such as Account) to a higher level (such as Customer or Household) is called aggregation.

Custom Measures

Custom Measures are derived metrics that are built by using formulas and calculations based on other measures. They may include logical functions such as `IsPositive`, `IsZero`, and `Not`, and mathematical functions such as `Absolute`, `Random`, and `Sign`. Custom measures can also be aggregated to various targeting levels of a customer hierarchy using aggregate functions such as `Sum`, `Count`, `Average`, `Minimum`, or `Maximum`.

The Custom measure detail view includes the Custom measure form at top, and the measure-builder panes, which contains Available Measures, and Expression Builder elements. In addition, you can use the optional custom measure Aggregation view and Restriction view to refine the data set to which the custom expression applies.

Custom measures can be aggregated to each targeting level within the customer hierarchy. If you select a customer hierarchy and targeting level for a custom measure, Siebel Marketing assumes that you intend to aggregate the measure, and requires an aggregation function before you can save the custom measure.

When you specify the level, you are indicating that data from the level below should be aggregated up to the level selected. For example, if a customer has multiple bank accounts, calculating a Total Balance (sum) across accounts would be a custom measure for the targeting level.

The choice of aggregation levels determines what measures are available to use in the measure you are building. If you select a secondary targeting level as your aggregation level, you can only work with measures at that level and below. Measures aggregated at higher levels are not available.

Creating Measures

Custom Measures

Restrictions imposed using the custom measure Restriction view are flagged with a check mark in the Restrictions check box after you save the restriction. Measure restrictions are useful if you want to see list measure output that is computed at a certain hierarchical level, a specific bucket definition, and so on without restricting the counts of a targeted segment or the entire stage. For example, you might want to know the average dollars that were spent in the last quarter of 2000 but see this data for customers that spent money in the four quarters of 2000.

[Table 33](#) provides examples of some uncomplicated custom measures and expressions.

Table 33. Custom Measure Expressions

Custom Measure Name	Base Measure Type	Targeting Level	Aggregation Function	Expression
Average Opening Account Balance	Bound: Opening Account Balance	Customers	Avg	Opening Account Balance / 12
Maximum Opening Account Balance	Bound: Opening Account Balance	Customers	Max	Opening Account Balance
Minimum Opening Account Balance	Bound: Opening Account Balance	Customers	Min	Opening Account Balance
Number of ATM Transactions	Bound: Transaction Amount	Account	Count	Transaction Value
Number of ATM Transactions by Customer	Custom: Number of ATM Transactions	Customers	Sum	Number of ATM Transactions
Number of Orders Per Month	Bound: Annual Orders	Account	Sum	Annual Orders/12

Creating Custom Measure Records

The following procedure details how to create custom measures using the custom view tab. A custom measure also may be defined using the All Measures view, with the measure type set to custom, or in the Aggregation, and Restriction views.

When defining the measure from the All Measures view, drill down on the measure name to open the Custom view and complete the rest of the mandatory details in the form before building the custom measure criteria.

When creating a custom measure, you may choose to specify a customer hierarchy, or a customer hierarchy and a targeting level within that hierarchy.

If you specify a customer hierarchy, measures built on that selected customer hierarchy are available for use in the expression. Measures not affiliated with any customer hierarchy are also available for selection.

If neither a customer hierarchy nor targeting level has been specified, only measures that do not have any affiliation with any customer hierarchy are available for selection.

To create a custom measure

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Measures.
- 2** Click the Custom view tab.
- 3** In the Custom measures form, create a new record.
- 4** Complete the necessary fields.
 - a** Type a name for the measure.

The name field has a maximum length of 50 characters.
 - b** Type a description.

Include descriptive information on planned aggregations, restrictions, or both.
 - c** If you want to aggregate the measure, click the Customer Hierarchy select button.
 - d** In the Pick Customer Hierarchy dialog box, select a predefined customer hierarchy and click OK.
 - You cannot add a customer hierarchy after the measure is saved.
 - If you are copying a custom measure with an established customer hierarchy, you cannot change the customer hierarchy in the copy. You can change the targeting level (if there is more than one), and the expression.
 - e** If you are aggregating the measure and have selected a customer hierarchy, click the Targeting Level select button.

- f** In the Pick Targeting Level dialog box, choose a level from within the selected customer hierarchy and click OK.
- g** If you specified a customer hierarchy and targeting level, click the Aggregation Function select button.
- h** In the Pick Aggregation Function dialog box, choose a function and click OK.
Options are Avg, Count, Distinct, Min, Max and Sum.

Building Custom Measure Expressions

When creating custom measures, you can use measures listed in the Available Measures list, the operator buttons, the computer's keypad, and the available mathematical and logical function values to build the expression.

The Available Measures list shows:

- Bound measures
- Measures defined within the selected customer hierarchy
- Custom measures not associated with a particular customer hierarchy

[Table 34](#) describes the functions that are available when creating logical custom measure expressions.

Table 34. Logical Functions

Logical Function	Description	Syntax
IsNegative	Returns 1 if the number is negative or 0 if the number is positive.	IsNegative(number)
IsPositive	Returns 1 if the number is positive or 0 if the number is negative.	IsPositive(number)
IsZero	Returns 1 if the number is zero or 0 if the number is nonzero.	IsZero(number)
NOT	Reverses the value of its argument. Use NOT when you want to verify that a value is not equal to one particular value.	Not(logical)

Table 35 describes the functions that are available when creating mathematical custom measure expressions.

Table 35. Mathematical Functions

Mathematical Function	Description	Syntax
Abs (Absolute value)	Returns the absolute value of a number. The absolute value of a number is the number without its sign.	ABS(number)
Exp (Exponential)	Returns e raised to the power of number. The constant e equals 2.71828182845904, the base of the natural logarithm.	Exp(number)
Ln (Natural log)	Returns the natural logarithm of a number. Natural logarithms are based on the constant e (2.71828182845904).	ln(number)
Random	Returns an evenly distributed random number greater than or equal to 0 and less than 1. No argument is needed for this function. If a user adds an argument, Random still will generate a random number between 0 and 1.	Random (number)
Sign	Determines the sign of a number. Returns 1 if the number is positive, zero (0) if the number is 0, and -1 if the number is negative.	Sign(number)
Sqrt (Square root)	Returns a positive square root.	Sqrt(number)

To add expressions to custom measures

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Measures.
- 2 In the All Measures list, select a custom measure.
- 3 Click the Custom view tab.

The custom measure’s details appear in the form above the expression builder.

- 4 In the Available Measures pane, select a measure and click Add to Expression.

NOTE: To show fields such as measure type and customer hierarchy, click the menu button and choose Columns Displayed.

- 5 To use logical or mathematical functions in the expression:

- a Select the category (Mathematical, Logical, or All).

The elements of each function category appear in the pane at right.

- b Double-click the function in the elements list.

The function appears in the expression pane at the cursor location.

Function syntax is detailed in [Table 34 on page 152](#) and [Table 35 on page 153](#).

- 6 Add numerical values to the expression using the computer's keypad.

The values appear at the cursor location in the expression.

When typing numbers greater than 999, do not use digit grouping symbols such as commas or periods. For example, do not type 45,386 (comma separating groups) or 45.386 (period separating groups). Instead, type 45386.

- 7 To build compound expressions, click the operator buttons and add additional measures and expressions.

Make sure to position the cursor where you want to insert the operator before inserting an item.

To use parentheses, select the expression to be contained within the parentheses, and then click the open parenthesis button and the close parenthesis button. Use parentheses whenever possible to isolate pairs of values and an operator.

- 8 When you have finished building the custom measure expression, click Validate & Save.

To delete all or a portion of the expression

- In the Expression Builder pane, select the part of the expression to be removed, and press the Delete key on your keyboard.

To edit the custom measure from this view

- In the Custom form, make changes as needed and save the record.

Aggregation and Restrictions for Custom Measures

Chapter 4, “[External Data Mapping](#),” explains customer hierarchies, and targeting levels within a hierarchy. Using measures, you can extend these concepts with aggregation and restrictions.

Aggregation determines how a custom measure is calculated. If you want to aggregate a custom measure, make sure you select a customer hierarchy and targeting level when creating the custom measure because aggregation is tied to the targeting level. After you have chosen a hierarchy and targeting level, an aggregation function is required.

Restrictions allow you to limit a measure to a portion of the data and the rest of the records in the table are ignored when the measure is computed. For example, you might want to restrict data to a geographic region by ZIP (Postal) Code, or by a time period. The restriction applies to any related measure that uses this restricted custom measure. The restrictions can be defined by buckets or attribute hierarchies that belong to the selected customer hierarchy and targeting level.

NOTE: A measure used at the bucket level should be aggregated to the same level as the bucket. Attempting to use data at a lower level will cause undesired results.

About Aggregation Levels

There are three aggregation levels in Siebel Marketing.

- **Record.** Measures aggregated at the record level are calculated for each record. Typically, this level is used when you want to perform a simple transformation on a bound measure, for example, converting annual income into monthly income. To use record-level aggregation, do not select an aggregation level when creating a custom measure.
- **Targeting Level.** Measures aggregated at a level within a customer hierarchy are calculated when records for a distinct value of the primary targeting level are collected.

For example, if the customer hierarchy has SSN as the primary targeting level, and Account_ID as the secondary targeting level, account information for one Social Security number (SSN) is collected before the measure is calculated. Each time Siebel Marketing gets a new SSN, it repeats the customer hierarchy aggregations.

- **Customer Hierarchy.** The customer hierarchy is where measures aggregated at a lower level get added up. For example, you might have a Customer-Account Hierarchy, with Customer as the primary level, Account as the secondary level, and other levels under Account. If your measure is derived at the Account level, the lower levels are rolled up for aggregation.

For example, if you are using a function such as MIN, you would not apply the function to records aggregated at the record level, because the MIN of one record is no different than the record itself. You get value out of applying the MIN function to records aggregated at a level within the customer hierarchy, or the customer hierarchy itself.

Adding an Aggregation Function

The custom measure Aggregation view displays information about the selected custom measure in the form at the top. The Minor Aggregation list expands to display Attribute Hierarchies and Buckets belonging to the measure's customer hierarchy. By selecting a Bucket or Attribute Hierarchy value, you specify how the record-level data should be aggregated (for example, Average by Month, Quarter, or Year).

NOTE: Whenever you modify a custom measure expression, save it first before beginning aggregation.

To apply aggregation to the custom measure

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Measures.
- 2** In the All Measures list, select the custom measure, and drill down on the measure name.
- 3** Click the Aggregation view tab.
- 4** In the Minor Aggregation list, expand the folders to display Attribute Hierarchy and Bucket values.
- 5** Select the desired attribute or bucket value check box.

Selected values have a check mark. To discard a selected item, select it again to remove the check mark.

NOTE: You cannot select multiple levels within the same attribute hierarchy, however, you can select values from different hierarchies, for example, Yearly and Region.

- 6** Save the record to commit the aggregation.

Adding Restrictions to Custom Measures

Build a restriction for the measure using the custom measure Restriction view. This view provides information about the selected custom measure in the form and allows you to select attribute hierarchies and buckets to use as restrictions from the Restriction tree. When you select a specific value from an Attribute Hierarchy or Bucket, you restrict the aggregation to records with the selected value.

Table 36 provides examples of custom measure aggregations and restrictions.

Table 36. Custom Measure Restrictions

Measure Name	Level	Aggregation Function	Expression	Restricted to	Result
Monthly Account Usage	Account	Sum	Transactions	2001 (from a time-based attribute hierarchy)	Only aggregates transactions that occur during 2001
Number of Customer Withdrawals	Customers	Sum	Transactions per Account	Transaction Type = Withdrawal	Only aggregates transactions of type withdrawal

To apply restrictions to custom measures

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Measures.
- 2** In the All Measures list, select the custom measure, and drill down on the measure name.
- 3** Click the Restriction view tab.
- 4** In the Restriction tree pane, expand the folders for Attribute Hierarchies and Buckets to display values.
- 5** Select a value:
 - a** To include a value, click a value's check box and a check mark appears.
 - b** To exclude a value, clear the check mark by clicking on it.

Creating Measures

Aggregation and Restrictions for Custom Measures

- c** To select values in a range of values, click Select Group and select the range of values.

Selected attributes have a check mark.

Defining List Measures

List measures are mappings to database fields such as name, address, state, postal code, customer key, and so on.

These measures are used as columns in output file layouts for distribution lists and to help you define Campaign Load Mappings, which specify the data on each campaign contact that is recorded in the Siebel transaction database. Unlike bound measures, list measures do not support calculations, so they cannot be used in other measure definitions.

Use either the All Measures list or click the List view tab, to create list measures by mapping to a table and field in your data warehouse. For example, you might define a list measure called First Name and map it to a field called FNAME in a table called CUST_INFO. When you define your list formats and generate a campaign distribution list that uses the First Name field as part of the format, the process retrieves your customers' first names from the CUST_INFO.FNAME field.

When you create a list measure from the All Measures list, set the measure Type to List. The measure type is automatically set to list when you create the measure from the List tab view.

The List view tab displays defined list measures and output file layouts that use the measure. To view details of the output file layout, drill down on the name link. For more information, see [“Working With Output File Layouts” on page 170](#).

Use the following procedure to create list measures that are used for output file layouts for distribution lists and Campaign Load Mappings for external data mapping.

To create a list measure

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Measures.
- 2** In the All Measures list, select the custom measure, and drill down on the measure name.
- 3** Click the List view tab.
- 4** In the List measures list, create a new record.

- 5** Complete the necessary fields.
 - a** Type a Name and Description for the list measure.

The name field has a maximum length of 50 characters.
 - b** Click the Table select button.
 - c** In the Pick Tables dialog box, choose the table that contains the field that will be referenced by list measure and click OK.

For example, you might choose a table called CUSTOMERS.
 - d** Click the Fields select button.
 - e** In the Pick Fields dialog box, choose the field from the list of fields in the table and click OK.

For example, you might choose the reference field TELEPHONE in the CUSTOMER table.

Repeat this procedure to create list measures for every table and field that contain information you might use in a contact list.

Typical list measures might include the following:

- Customer ID
- Title (Mr., Mrs., Ms., Dr., and so on)
- Name
- Address (including street, city, state, and ZIP or postal code)
- Telephone number
- Email address
- Account information (balances, service level, service bundle, and so on)

NOTE: You will need to create list measures for each unique identifier that corresponds to each targeting level (Key 1, Key 2, and so on). For more information, see [“About Customer Hierarchies” on page 95](#).

Creating Source Code, List Formats, and Vendor Profiles

7

Siebel Marketing supports the assignment of source codes to each contact in a campaign. A source code appears to the customer as a seemingly indecipherable mix of alphanumeric characters that typically can be found on a mailer. Marketers, however, can gather a wealth of information about the demographic makeup of the consumer responding to an offer, as well as the particulars of the marketing campaign that delivered the promotion, by decoding the source code.

In a typical scenario, a customer contacts a company's call center to place an order for merchandise or ask questions about an item advertised in a catalog. During the first few minutes of the call, the representative asks the customer to read the code that appears on the catalog's label or order form. Depending on the information received, the call center representative may be authorized to present to the customer a better offer on the merchandise than the one in the catalog.

The call center representative can also capture the customer's source code to make sure that the marketing organization can make the link that this customer is responding to a direct marketing campaign.

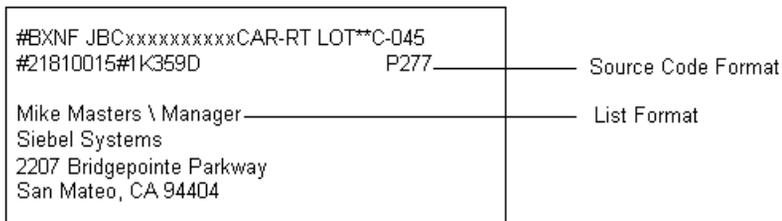


Figure 4. Typical Output List Layout and Source Code Format on Mail Label

In Siebel Marketing, a unique source code is assigned to a marketing program element each time an element is created. Marketing program elements include program plans, stages, segments, campaigns, and waves.

NOTE: When marketing programs, segments, and campaigns are created, Siebel Marketing assigns a unique source code value to new program stages, segments, and campaigns. Although the stage or campaign's name may be duplicated, the source code field is the actual identifier. If you change the system-assigned source code to something more meaningful to you, make sure it is a unique value.

These individual source code components are concatenated and grouped according to the sequence and format that you specify in the Source Code Formats view, shown in [Figure 4 on page 163](#), to help you track your marketing program and analyze response to campaigns and offers. The source code format can contain up to 75 characters and may optionally include other tracking information.

When you build a distribution list, the source code for each contact is assembled, based on the characteristics associated with the target contact in the marketing program. For example, the source code for a contact who is in Segment 1 and is in the first wave of Campaign 1 can be different from the source code for a contact who is in Segment 3 and the second wave of Campaign 1.

In addition, you can tailor the contact information that is generated for the distribution list to suit your business requirements. At minimum, a list has a contact's name or some other identifier and a source code. It may also contain an address (if you are mailing to the contact), phone number (if you are calling the contact), email address, account number, and so on.

Using the Output List Layouts view, you can define, edit, and sequence the fields (types of information) that appear in your distribution list or mail label, and specify which seed contacts (quality control personnel receiving the offer) will be included in the list. Output file layout elements include a measure, a field, and a source code.

Creating Source Code Formats

The Source Code Formats view allows you to define a source code format, specify the individual components that will be included, and determine how these components will be arranged or sequenced.

After creating a source code format, you can use the source code in the following ways:

- Include in an output file layout.
- Embed as a personalization element in an email offer.
- As input in the customer-facing eMarketing home page (in the applet named Do you have another offer?).
- As a direct input to a response from any of the Response views.

NOTE: Always associate the source code format with the program plan stage before generating the snapshot.

The Source Code Formats list shows available source code formats. The All Components list displays details of the source code format selected in the list and is used to create the structure of the source code grouping, or format. The All Components list contains the automatically computed length of each source code (maximum of 75 characters).

By clicking Move Up or Move Down, you can rearrange components in the format. If you delete components (for example, component 2 and component 4 of 5), click the menu button and choose Resequence to reorder the remaining components before saving the record.

To create a source code format

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Source Code Formats.
- 2 In the Source Code Formats list, create a new record.

NOTE: The customer hierarchy and the targeting levels (within the specified hierarchy) determine the custom measures and buckets (based on custom measures) that are available in your source code format. If you copy a source code format, you cannot change the selected customer hierarchy. However, you can change the code's sequence, measures, and attributes. For more information on customer hierarchies and targeting levels, see [Chapter 4, "External Data Mapping."](#)

- 3 Complete the necessary fields for the Source Code Format.
 - a Type a name and a description for the format.
 - b Click the Customer Hierarchy select button.
 - c In the Pick Customer Hierarchy dialog box, select the predefined customer hierarchy and click OK.

NOTE: To view details of the customer hierarchy and any targeting levels associated with the source code format, click the hierarchy or targeting level name links to open the Customer Hierarchies view.

- d Click the Targeting Level select button.
 - e In the Pick Targeting Level dialog box, select a level and click OK.
- 4 When you save the source code format, the new format appears in the Source Code Formats list.

The Stages read-only field lists program stages that use this source code format. Click the Stages select button to open the Stages dialog box and review the list.

To define source code format components

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Source Code Formats.
- 2** In the Source Code Formats list, select a source code format.
- 3** In the All Components list, create a new record.

- 4 Complete the fields for the component, using the following information as a guide.

Field	Description
Buckets	If the source code format component is a bucket (a range of values), click the Buckets select button. In the Pick Buckets dialog box, choose a bucket and click OK. An example of a bucket that might be used in a source code format is one that identifies the customer's credit rating.
Measure	If the source code format component is a measure, click the Measure select button. In the Pick Measure dialog box, select the measure from the list of available measures and click OK. An example of a measure that might be used in a source code format is Account ID or Social Security number. Measure can include values for bound, custom or list measures.
Name	Choose the name of the source code component from the list. Options are Stage, Segment, Campaign, Wave, Measure, and Buckets.
Sequence	Sequence determines the position of the code component in the source code format. Sequence is automatically set when source code components are added to the format. Use Move Up, Move Down or Resequenece to adjust the order.
Width	<p>The width of the source code component is automatically added. Change the width if desired. Defaults are wave = 1, bucket = 5, measure = 16, stage = 10, segment = 10, and campaign = 10.</p> <p>If the component's source code width is 16 characters and you specify 6 as the width in this field, the component's individual source code is truncated to the first 6 characters.</p> <p>If the component's code has a width of 10 characters, and you specify 20 as the width, 10 blank spaces appear in your source code format.</p> <p>The maximum width for the entire source code format is 75 characters.</p>

- 5 Save the component.

NOTE: Repeat [Step 3](#) through [Step 5](#) to add more components one row at a time.

- 6 Adjust the sequence of the components by clicking Move Up and Move Down.

To reorder deleted components before saving the changes, click the menu button and choose Resequence.

Modifications in the Source Code Format are reflected the next time a program snapshot is built. For information on how to associate a source code with a stage, see [“Adding a Stage to the Program” on page 388](#).

Working With Output File Layouts

An output or distribution list of contacts is generated when your campaign is loaded. The customer information is arranged according to the predefined output file layout, which is designed according to how the list will be used. A fulfillment vendor might require a full name and address for each contact in the list to ship a product sample. A call center representative might only require the customer's name, telephone number, and account rating.

For example, if your direct mail output file layout requires a full address as well as a source code, you add predefined list measures such as first name, last name, address, city, state, and ZIP and a source code format in sequential order as you define the list format.

You can define, edit, and sequence the fields (types of information) that you want to appear in your distribution list. In addition to customer contact information, you can also specify that you want to integrate seed contacts—quality control personnel that will receive the offer and evaluate its timeliness, appearance, and so on. For details, see [“Creating and Modifying Seed Lists for Output File Layouts” on page 174](#).

The Output File Layouts list displays predefined list formats. Selecting an output file layout displays its properties in the All Components list where you can display a list of components or details about the selected component.

Creating Output File Layouts

Use the Output File Layouts view to define, edit, and sequence the fields that you want to appear in your distribution list.

To create output file layouts

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Output File Layouts.
- 2** In the Output File Layouts list, create a new record.
- 3** Complete the necessary fields.
 - a** Type a name and description for the format.

- b** Select the Header check box if list header information is required by your vendor.

If this check box is selected, header information is automatically added to the list when it is generated. The header format includes the following:

- Stage name
- Campaign name
- Campaign source code
- Vendor name
- Wave source code
- Output file layout ID
- Location of the list file (path)
- Time stamp
- Number of records
- Record length (the sum of the width of the components in the output file layout)

- c** Click the Customer Hierarchy select button.

- d** In the Pick Customer Hierarchy dialog box, select the customer hierarchy for the format and click OK.

You cannot change the customer hierarchy after the record is saved.

- e** Click the Targeting Level select button.

- f** In the Pick Targeting Level dialog box, choose a level and click OK.

The customer hierarchy and targeting level chosen here determine the availability of custom measures when you define components of the output file layout. All bound and list measures are available, regardless of customer hierarchy.

- g** If you include seed names in the list, click the Seed List select button.

- h** In the Pick Seed Lists dialog box, choose the predefined Seed List and then click OK.

For more information on creating a seed list, see [“Creating and Modifying Seed Lists for Output File Layouts”](#) on page 174.

If you later disassociate a seed list from the format, make sure you remove seed list information from the Seed List Column and Seed List Default fields in the Details view fields. These fields are discussed in [Table 37](#).

Adding Components to Output File Layouts

In the All Components list, you can choose All Components or Details from the Show drop-down list to display a list of components or editable details of the selected component.

To add components to output file layouts

- 1** From the application-level menu, choose View > Site Map > Marketing Administration screen > Output File Layouts.
- 2** In the Output File Layouts list, select a format.
- 3** In the All Components list, create a new record.
- 4** Complete the fields for each component, using [Table 37](#) as a guide.
- 5** Save the record after creating each component.

Table 37. Fields for Output File Layout Components

Field	Comment
Alignment	Select the alignment for the Output File Layouts field. The options are Left and Right. For example, you might want the name and address of the contact to be aligned at left and a code to appear at right.
Database Field	If the Type is field, click the Field select button. In the Pick Fields dialog box, select a database field and click OK.

Table 37. Fields for Output File Layout Components

Field	Comment
Field Format	<p>(Optional) The default is the native format for the stored data.</p> <p>Choose a format value (mask) to assign to a field. Options are MM/DD/YY and YYYYMMDD, (999) 999-9999 (phone number), 999-99-9999 (SSN), AAAAAA (ZIP), AAAAAA-AAAA (ZIP + 4).</p> <p>Your administrator should set up this list of values to conform to your business and regional needs.</p>
Measure Name	<p>If the Type is a measure, click the Measure select button. In the Pick Measures dialog box, select a measure and click OK.</p>
Number of Values	<p>Type a number that controls the number of values that appear in the list for this field. The maximum number of values is 50000.</p> <p>For example, if vehicle name (Veh_Name) is the field value, and you are only interested in the first two vehicles per household, you would add 2 values here. When the list is distributed, two fields are created to hold this information.</p> <p>Another example is if a consumer has two addresses associated with his or her account. If the value of the Address field format is 1, only the primary address associated with the consumer appears on the list.</p>
Seed List Column	<p>Choose the seed list column name that closely matches the Database Field or Measure. For example, the field entry might be customer.first name and the seed list column name, FRST_NAME.</p> <p>If you copy a list format without seeds and then attach a seed list to the format, make sure you complete this field in the copied list format.</p>
Seed List Default	<p>If there is no close match for the seed column name, type a series of numerals as a default.</p> <p>If you copy an output file layout without seeds and then attach a seed list to the layout, make sure you complete this field in the copied list format.</p>
Sequence	<p>This field is automatically populated as you add output file layout components.</p> <ul style="list-style-type: none"> ■ To change the sequence after saving a component, select the component and click Move Up or Move Down. ■ If you delete a component, reorder the remaining components by clicking the menu button and choosing Resequence.

Table 37. Fields for Output File Layout Components

Field	Comment
Type	Choose the component type. Options are Measure, Source Code, and Field.
Width	<p>A default value is automatically added. The default output when generating a list is ASCII. ASCII format has a maximum record width of 4K.</p> <p>When you send list files to vendors you can indicate that you want to use fixed-width output instead of ASCII. To use a fixed-width output, you can specify EBCDIC as the form in the Campaign Waves view (Campaigns screen, Waves view tab, List Distribution list).</p> <p>To change the Width value, click the calculator button and type a numerical value not to exceed 2,000, for fixed-width output.</p>

Creating and Modifying Seed Lists for Output File Layouts

Use the List Management views to add or edit prospects that you want to designate as seeds. Then compile those prospects as a new internal list, which can be chosen as a seed list in the Marketing Administration screen's Output File Layouts view.

To add prospects and create a seed list

- 1 From the application-level menu, choose View > Site Map > List Management > Prospects.
- 2 In the Prospects list, create a new record.
- 3 In the More Info form, complete the necessary fields for the prospect that will be used as a quality control seed and save the record.

NOTE: Repeat [Step 2](#) and [Step 3](#) to add more prospects.

- 4 In the Prospects list, select the name of each quality control prospect that you want to include in the seed list.

TIP: Use CTRL select to choose nonsequential and SHIFT select to choose sequential names in the prospects list.

- 5 In the Prospects list, click New Internal List.

- 6** From the Show drop-down list, select Lists.
- 7** In the Lists list, find the list record with a name consisting of your user ID and the date and time that you created the list.

Rename the seed list, if desired.

To change the name of the seed list

- 1** In the Prospect Lists list, drill down on the list name.
- 2** In the List Name field, edit the name and save the record.

For information on associating the seed list with a marketing program list, see [“Working With Output File Layouts” on page 170](#).

Previewing Distribution Lists and Formats

After a snapshot has been built, you can review the output file layout, using the Programs screen’s List Preview view, before generating the list. This view shows the order in which the fields occur, their width, and alignment.

NOTE: If you modify an output file layout, the changes are reflected in the next snapshot that is generated.

For more information, see [Chapter 19, “Previewing and Generating Lists.”](#)

Associating an Output File Layout With a Program Stage

The output file layout is associated with a program stage in the Stage Detail form.

Navigate to the Stage Detail form by double clicking on the stage object in the program flow workspace. Then, associate the output file layout by clicking the select button in the Output File Layout field and choosing the format from the list. For more information, see [Chapter 13, “Designing Marketing Program Plans.”](#)

NOTE: Output files are generated when you load the campaign. If you add or remove any contacts from the campaign after the campaign load, the changes will not be reflected in the output list.

Setting Up Vendor Profiles

Vendors are external partners that receive lists of target contacts when you launch a campaign. Your campaign strategy might call for vendors such as call centers, fulfillment centers, and printers to split lists of contacts. Some customers would receive a telephone call, others a direct mail offer, and a third group would receive promotion samples.

Use the Vendors view to create a library of vendor profiles for your marketing programs. Vendors include telemarketers, fulfillment houses, and any other company you retain to help you with campaign distribution.

Vendor Tasks

When you launch a marketing campaign, the generated output list is automatically sent to the specified vendor using the vendor's preferred distribution method and communications protocol (File Transfer Protocol, email, and so on).

Before creating a vendor record, make sure the following tasks have been performed:

- **Create Output File Layouts.** Ask your vendor what format they prefer for the automatically generated distribution lists. For example, do they want the list to contain a header or do they prefer ASCII (default) or fixed-width output. Then, create an output file layout tailored to the vendor's preferences.

You will be asked to specify the output file layout when creating the vendor profile. For details, see [“Working With Output File Layouts” on page 170](#).

- **Determine Distribution Method and Create Distribution Profile.** As you are creating the vendor record, you will need to select a distribution method and a distribution (communications) profile for the method. Set up distribution profiles that reflect each vendor's requirements.

For example, if your vendor prefers to receive list files using File Transfer Protocol (FTP), you would need to set up a communications profile for that vendor containing information on HostName, IP Address, Password, and so on. Communications profiles are set up using the Communications Administration screen's Communications Drivers and Profiles view.

If the list files will be sent to the vendor attached to email, set up a communications profile for email, and verify that the vendor contact has provided an email address. For more details, see [“Defining Distribution Profiles for Vendors” on page 180](#).

If someone in your marketing department will be receiving the distribution list, rather than an outside vendor, a vendor record and communications profile that includes the team member's email address should be set up.

Defining Vendors

Use the following procedure to set up profiles for the third-party vendors that will receive the distribution list of contacts. If your marketing department is the list recipient, set up a vendor profile using the marketing department contact as the vendor.

To define vendors and assign list distribution methods

- 1 From the application-level menu, choose View > Site Map > Marketing Administration screen > Vendors.
- 2 In the Vendors list, create a new record.

- 3 Complete the fields for the vendor definition, using [Table 38 on page 179](#) as a guide and save the record.

NOTE: If one vendor can handle multiple list formats, such as a direct mail format and a telemarketing format, create separate vendor profiles for each type. For example, the profiles might be named: Ace Fulfillment: Direct Mail, and Ace Fulfillment: Telemarketing.

Table 38. Vendors View Fields

Field	Comment
Address, City, State, ZIP (Postal Code), Country	<p>Click the select button and in the Account Addresses dialog box, add a new account address by clicking New.</p> <p>Type the vendor’s address city and postal code in the fields provided. Choose State and Country from the lists.</p>
Contact Name	<p>Click the Contact Name select button. In the Add Contacts dialog box, select the contact name and click OK.</p> <p>If the contact does not appear in the list, add the relevant information using the All Contacts list. (From the application-level menu, choose View > Site Map > Contacts > All Contacts).</p> <p>By default, the system looks for the email address in the EMAIL_ADDR column of the S_CONTACT table. If you store the email address in a different column, refer to <i>Siebel Communications Server Administration Guide</i> to configure the Recipient Email Address Field.</p>
Default List Format	<p>Click the Default List Fmt select button. In the Pick Output File Layouts dialog box, choose a predefined output file layout and then click OK. For more information on creating List Formats, see “Working With Output File Layouts” on page 170.</p>
Distribution Method	<p>Choose the method that describes how the distribution list will be sent to the vendor. Options are Direct Mail, Email, Fax, or FTP.</p>
Distribution Profile	<p>Choose from the list of predefined distribution profiles. Distribution Profiles are defined using the Communications Administration > Communications Drivers and Profiles view.</p>

Table 38. Vendors View Fields

Field	Comment
Email Address	The email address for the vendor is automatically added if it has been defined for the selected vendor contact. You cannot add the email address in this view. If you are planning to send a generated list to the vendor using email, the contact's email address must be added in the All Contacts or My Contacts view.
Fax	Type the vendor's fax number.
Name	Type the vendor's name.
Phone	Type the vendor's telephone number.

Defining Distribution Profiles for Vendors

Use the Communication Administration screen's Drivers and Profiles view to define communications profiles for email, fax, and FTP distribution of lists to vendors. Output file layouts and vendor profiles must be defined for all types of lists. If you are using email or FTP, you must also define Email Address, Distribution Method, and Distribution Profile in the Vendor profile. For more information, see ["Using Delivery Profiles - Email, eNewsletter, and Fax" on page 277](#).

Siebel Marketing provides default drivers in its library that can be modified for use when sending files to a vendor. A system or marketing administrator can create distribution profiles for each of these driver types that override the default parameters for that driver. For more information on communications drivers and profiles, see *Siebel Communications Server Administration Guide*.

Real-time marketing offers are based on new customer information received during a phone call or a Web session. For example, if a customer provides a new address during a phone call or on a Web site, the offers and the order in which offers are presented may change.

This ability to adjust offers in real time can provide several benefits. It can increase revenue by using information obtained during inbound customer communications to create cross-sell and up-sell opportunities. It can also reduce marketing costs, increase the relevance of offers, and increase the chance that customers will respond.

The following is a list of some important features of Siebel Real-Time Marketing:

- **Offer qualification.** Siebel Marketing segments and campaigns handle offer qualification. As components of marketing programs, segments and campaigns allow for customers who meet a certain set of criteria to see a set of offers. In addition, Siebel Personalization rules can be used to limit the set of offers returned.
- **Offer sorting.** You set rules in Siebel Personalization and allow the list of available offers to be sorted based on offer or customer attributes. By default, real-time offers are sorted in standard ASCII sort based on the offer name. In addition, targeted offers sort before non-targeted general offers. You can change the standard sort sequence and filter the records to match your business needs. Sorting and filtering methods that are available to you are based on the features you selected when you purchased Siebel Marketing. Some methods are available with basic Real-Time Marketing. If you use Siebel Analytics, you have additional sort and filter capabilities. For more information, see [“Setting Up Real-Time Marketing With Siebel Analytics” on page 196](#).
- **Offer delivery.** This can take place at any customer interaction point. One example that is preconfigured for Siebel Marketing is the Featured Offers area on the Siebel eMarketing homepage.

Based on your organization's priorities, you can use real-time marketing in the following ways:

- **Real-Time Marketing—Basic.** You use Siebel Marketing to qualify customers for offers and configure offer content and use straightforward sorting and filtering techniques to determine which offers to display to each customer. For example, you can sort offers based on the inbound priority that you assign to each offer.
- **Real-Time Marketing and Analytics.** You add the Siebel Analytics Server and a third-party predictive modeling application to basic real-time marketing. This allows the list of offers to be limited and sorted based on real-time behavioral predictions or scores. Both versions return a list of offers to the customer.

Setting Up Real-Time Marketing—Basic

Siebel Real-Time Marketing uses the My Offers business component to select and display personalized offers to a customer. For example, the Featured Offers List Applet (based on the My Offer business component) appears on the Siebel eMarketing home page.

You might want a Call Center representative to provide the best offer to a customer at the end of a service contact. To accomplish this, you need to create a list or form based on the My Offer business component in Siebel Tools. For instructions about creating applets, see *Siebel Tools Reference*.

The My Offer business component finds qualified offers for a particular customer and arranges them by the standard or a specified sort order. In addition, offers can be filtered to return only those offers that match a customer's profile information. This section discusses the following topics:

- [Creating Offers for Real-Time Marketing on page 184](#)
- [Qualifying Offers on page 185](#)
- [Sorting and Filtering Offers on page 185](#)
- [Tracking Offer Rejections on page 193](#)
- [Real Time Marketing API Methods on page 194](#)

Creating Offers for Real-Time Marketing

To create outbound Web and phone offers, see [Chapter 10, “Creating and Using Offers.”](#) For inbound offers you need to specify the additional fields shown in [Table 39](#) that only appear in the More Info form in the All Offers, the Web Offers, and the Phone Offers views of the Offers screen. To see these fields, you may need to click the show more button in the in the More Info form.

Table 39. Real-Time Marketing Offer Fields

Field	Description
Activation Date/Expiration Date	You can complete these fields and the offer will only be displayed for the specified period of time. If you do not specify offer dates, the offer will be available when it is included in a valid campaign.
Inbound Active Flag	You must select this check box if you want an offer to be visible to customers. This flag is unchecked by default, so you need to check it for each offer you intend to display. It is recommended that you wait to select this flag until you are ready to launch or test the campaign. This flag also allows you to remove an offer after you activate a campaign. For example, if you ran out of product inventory for the offered product and this was causing customer satisfaction problems, you might choose to make the offer inactive for a period of time until more stock comes in.
Inbound Priority	For information, see “Sorting by Offer Metric Fields” on page 186.
Margin	For information, see “Sorting by Offer Metric Fields” on page 186.

Qualifying Offers

Siebel Marketing segments and campaigns handle offer qualifications. Segments and campaigns allow customers who meet specified criteria to receive a set of offers. To learn more about setting up segments, campaigns, and offers, see the chapters about these topics in this guide.

Offer qualification allows you to identify the contacts or prospects who can see different offers. For example, a particular credit card is only available to people with a high credit score. You can create a segment definition that selects only people with a high credit score to be part of the segment. This segment is attached to a campaign that contains credit card offers. After you load the campaign (based on the segment criteria) only the people in that campaign will receive the offers for this particular credit card. Campaigns and offers activate and expire based on the start and end dates that you assign. This changes the pool of available offers.

Sorting and Filtering Offers

Sorting offers is a critical element of providing “better” and “best” offers to a customer. If a contact qualifies for multiple offers, the offers can be sorted and filtered based on that contact’s Personalization profile attributes. Profile attributes can be taken directly from the static or dynamic profile properties found in Personalization. Siebel Real-Time Marketing can use Siebel Personalization rules to create filter and sort specifications.

Real-time Marketing provides several ways to sort and filter offers:

- Standard sort based on targeting and offer name (default).
- Sort by offer metrics fields.
- Sort an Offer List Dynamically Using Profile Information.
- Filter an Offer List Dynamically Using Profile Information.

Using Standard Sort Based on Targeting and Offer Name

By default, the My Offer business component sorts any offers that are part of targeted marketing campaigns at the top of the offer list. Offers that are part of the default campaign appear next. Within each of these groups the offers will be sorted by name using ASCII sorting.

In standard ASCII sorting, numbers take precedence over letters and letters are listed alphabetically. The sort is case sensitive. Upper case letters precede lower case letters.

In [Table 40](#), the standard sort specification will take the unsorted list in the left column and sort the list as shown in the right column:

Table 40. Example of a Standard Sort

Unsorted List of Offers	Sorted List of Offers	Type of Campaign
2000 Model Phone for \$300	1000 Minutes for \$20	Targeted
2001 Model Phone for \$400	2000 Model Phone for \$300	Targeted
7000 Minutes for \$75	7000 Minutes for \$75	Targeted
X3000 Phone for \$200	2001 Model Phone for \$400	Targeted
1000 Minutes for \$20	Offer 1	Targeted
Offer 1	Offer 10	Default
Offer 2	Offer 2	Default
Offer 10	Offer 20	Default
Offer 20	X3000 Phone for \$200	Default

Sorting by Offer Metric Fields

Custom Offer sorting can be accomplished in two ways. For a persistent sort customization, you can modify the Sort Specification property for the My Offer business component and recompile the SRF file. For sort specifications that you need for a limited set of campaigns or for situations that require dynamic sorting based on more complex logic, you can use a special profile attribute named MyOfferSortSpec.

You can establish a sort specification using the My Offer business component for offer fields such as Inbound Priority (the offer's importance to you) and Margin (the offer's advantage or profitability rating for you). These two fields exist specifically for sorting. For example, if you want to use Inbound Priority or Margin as a way to sort offers, you need to identify the meaning of the each value (high, medium, low, and so on) that you will apply to each offer. [Table 41 on page 187](#) contains an example of an uncomplicated matrix for Inbound Priority values.

This sample strategy allows the marketer to constantly prioritize new offers based on past offers. As new offers are created and old offers expire, the list of available offers for customers changes.

Table 41. Inbound Priority Value Matrix

Inbound Priority Value	Offers	Meaning
Very High	New Product bundles	New product bundles take priority over other product types.
High	Popular Products	Any time the offer is for a top 10 product, it will receive a high priority.
Medium	Products with Excess Inventory	Products with excess inventory should be displayed to try and sell them.
Low	Standard Low Margin Products	Products with lower margins may be desirable to customers, but less important to the company than those with higher margins.
Very Low	Standard Volume Discount Pricing	Standard volume discount offers such as Buy 5 and Get 10% Off have the lowest priority.

You can add an inbound priority and a margin value to each offer that you create. When you receive responses to the offer, you can sort them by that value. [Table 42](#) shows a sample offer list sorted by Inbound Priority.

Table 42. Sample Sort by Inbound Priority

Offer Name	Inbound Priority
7000 Minutes for \$75	Very High
2001 Model Phone for \$400	High
2000 Model Phone for \$300	Medium
X3000 Phone for \$200	Medium
1000 Minutes for \$20	Low

[Table 43](#) shows the result of sorting the same sample list by the offer's Inbound Priority and then by Margin.

NOTE: The sequence of the two offers with a medium priority changed because one has a margin value of Medium and one has a margin value of Low.

Table 43. Sample Sort by Inbound Priority and Margin

Offer Name	Inbound Priority	Margin
7000 Minutes for \$75	Very High	High
2001 Model Phone for \$400	High	High
X3000 Phone for \$200	Medium	Medium
2000 Model Phone for \$300	Medium	Low
1000 Minutes for \$20	Low	Low

Sorting an Offer List Dynamically Using Profile Information

Sorting based on real-time information is sometimes called dynamic sorting because the sort can change immediately upon completion of an action or activity. A dynamic sort specification is set as a dynamic profile property for a contact and overrides the default sort specs that were established in the business component definition in Siebel Tools.

Dynamic sort specifications for an offer applet can be setup in Siebel Personalization. It is invoked when you associate the applet that contains the content with a personalization rule set that contains a rule that sets the dynamic sort profile attribute.

The MyOfferSortSpec attribute can be set using a special business service method name RTM – Scores from Decision Broker.SetDynamicSortSpec. The most common way to execute this business service method is to define a personalization rule that is associated with the appropriate My Offer-based applet. For more information about creating Personalization Rules, see the sections about creating rule sets and rules in *Personalization Administration Guide*.

To create personalization rules to establish sort specifications

- 1** From the application-level menu, choose View > Site Map > Personalization Administration > Rule Sets.
- 2** In the Rule Sets list, create a new record.
- 3** Type a name for the rule set in the Name field and select the Active check box.
- 4** In the Rules list, create a new record.

- 5 In the new record complete the fields using information in [Table 44](#).

Table 44. Rules Fields for Sort Specifications

Field Name	Description
Active	TRUE
Business Service Context	The sort specification to apply based on your requirements, for example: <ul style="list-style-type: none"> ■ Valid End Date (DESC) ■ Margin, Name ■ Offer Score (DESC), Margin, Name
Business Service Method	SetDynamicSortSpec
Business Service Name	RTM – Scores from Decision Broker
Conditional Expression	Based on your requirements. To apply the sort specification to all users, leave this property blank. To apply to certain users conditionally, type a suitable logic expression using profile attributes. Multiple sort rules can be created for complex sort rules. See the following sample expression: <code>GetProfileAttrAsNum('Customer Value') >= 50 AND GetProfileAttrAsNum('Churn Possibility') >= 70</code>
Rule Type	Business Service. For more information, see <i>Personalization Administration Guide</i> .
Sequence	Each rule should be assigned a number that establishes its order in the rule set. Each rule will be executed in sequence.

To create a rule set and associate it with an applet

- 1 From the application-level menu, choose View > Site Map > Personalization Administration > Applets.
- 2 In the Applets list, create a new record.
 - a Click the Name select button and select the applet you wish to associate with the rule set.

- b** Click the Conditional Expression select button.
- c** In the Expression Designer, create the expression you wish to use.
- 3** Scroll down to the Rule Sets list and, in the Rule Sets list, create a new record.
 - a** Click the Name select button and select the rule set you wish to associate with the applet.
 - b** In the Sequence field, type 1.

Each rule should be assigned a number that establishes the rule set's order. Each rule set will be executed in sequence.
 - c** Click the Conditional Expression select button.
 - d** In the Expression Designer, create the expression you wish to use.

Filtering an Offer List Dynamically Using Profile Information

Real-Time Offers can be filtered to return an offers list based on customer profile information. The marketer may want to limit the types of offers displayed. A Personalization Rule can be set to include or exclude offers that have only specified attributes such as the following:

- `Activation Date < 30 days ago`
- `Campaign Type = Retention`

To create an offer filter rule set

- 1** From the application-level menu, choose View > Site Map > Personalization Administration > Rule Set.
- 2** In the Rule Sets list, select a rule set and scroll down to the Rules list.
- 3** In the Rules list, create a new Rule and scroll down to the More Info form.

- 4 In the More Info form, define the rules for the filter using information in [Table 45](#).

Table 45. Rules Fields for Filter Specifications

Field Name	Description
Active	TRUE
Conditional Expression	<p>Based on your requirements. To apply this filter specification to all users, leave this property blank.</p> <p>To apply to certain users conditionally, type a suitable logic expression using profile attributes.</p> <p>Multiple filter rules can be created for complex filtering</p> <p>Example: <code>GetProfileAttr('Is Anonymous') <> 'TRUE' AND GetProfileAttrAsNum('Income') >= 50000</code></p>
Include Expression	<p>Based on your requirements. Offer property criteria to include in list if the Rule conditional expression is true.</p> <p>Example: <code>[Margin] <= LookupValue("OFFER_MARGIN", "3 - Medium")</code></p> <p>Example: <code>[Valid Start Date] < (Today() - 30)</code></p>
Exclude Expression	<p>Based on your requirements. Offer property criteria to exclude from the list if the Rule conditional expression is true.</p> <p>Example: <code>[Inbound Priority] >= LookupValue("OFFER_PRIORITY", "4 - Low")</code></p>
Rule Type	Expression
Sequence	Each rule should be assigned a number that establishes its order in the rule set. Each rule will be executed in sequence.

Tracking Offer Rejections

Offer Groups provide a way to track acceptance or rejection of similar offers across different channels. Offer groups appear in the Offer Groups view.

Creating an Offer Group

To create a new offer group, make sure the offers you want to include have been created, create a new offer group, and add the existing offers. Adding or deleting offers adds or removes them from the group, it does not create a new offer or delete an existing offer.

To create an offer group

- 1 From the application-level menu, choose View > Site Map > Offers > Offer Groups.
- 2 In the Offer Groups list, create a new record.
- 3 In the Offers list, create a new record.
- 4 In the Pick Offers dialog box, select the offers that you want to add to the offer group and click OK.

Suppressing Offers in a Group

For each offer group, the Group Suppression must be either enabled (default) or disabled. When group suppression is enabled, then the rejection of one offer in the group by a customer will suppress the other offers in that group for that customer. This is particularly helpful when the offers are similar across the multichannel environment. When group suppression is disabled, offers in these groups are not tracked. If you experience problems when tracking an offer group, you may want to disable group suppression (not delete the offer group) until the problem is resolved.

For example, a customer is not interested in a call center offer for a mortgage because they have just purchased a home. This is a missed opportunity, but even worse would be to make the same customer the same offer over again in another channel. Because the Web and call center offers can be linked together in an offer group, the rejection of a call center offer automatically suppresses the web content, which increases the likelihood that the customer will be exposed to an offer which will actually be of interest.

Changing Offer Group Suppression Behavior

The My Offer business component uses the Rejected Offers business component to control offer group suppression behavior. When you enable suppression for an offer group, the My Offer business component suppresses all offers if any offer in that group has a response of type Rejected.

This behavior is controlled by the search specification property of the Rejected Offers business component. The default search specification is:

```
[Response Type] = LookupValue( "COMM_RESPONSE_TYPE", "Rejected" )
```

You can specify more than one response type for the lookup value. For example, You might want to suppress all other offers in a group if the customer rejects or makes a purchase in response to an offer.

To suppress a group of offers based on a rejection or a purchase, change the Rejected Offers search specification property to:

```
[Response Type] = LookupValue( "COMM_RESPONSE_TYPE", "Rejected" ) OR  
[Response Type] = LookupValue( "COMM_RESPONSE_TYPE", "Respondent  
purchased" )
```

NOTE: After you modify the search specification in Siebel Tools, you need to recompile the SRF file.

Real Time Marketing API Methods

Real time marketing provides two Application Programming Interface (API) methods, `RejectOffer()` and `IncrementDisplayCount()` from My Offer Business component. These methods can be incorporated in the Siebel application as needed to collect the customer reject responses for an offer and number of times an offer was presented to a particular customer.

The Real-time Marketing API methods can be invoked from Siebel Business Processes (workflow), Runtime Events, Personalization Rules, Siebel Browser Script and Siebel eScript.

- **RejectOffer()**. You can incorporate this method into Siebel applications to allow a customer to reject an offer. Offer suppressing rules will prevent the rejected offers from being presented during customer's subsequent inbound communication. The following is a list of input parameters:

Input Parameter	Description
Campaign Offer Id	Campaign Offer Id of an Offer
Contact Id	Customer Id
Reason Code	Reason Code from OFFER_REJECT_REASON LOV
Reason Comment	Comments about Rejection
Prospective Contact	false by Default, True if the Customer is a Prospect

- **IncrementDisplayCount ()**. Can be incorporated into Siebel applications to increment a count of the number of times an Offer was presented to a specific customer. Offer Status for Contact Business component can be used to retrieve display count information. The following is a list of input parameters:

Input Parameter	Description
Campaign Offer Id	Campaign Offer Id of an offer
Contact Id	Customer Id

Setting Up Real-Time Marketing With Siebel Analytics

Siebel Decision Manager allows you to define and manage decisions as part of Siebel Marketing real-time offers for inbound channels. Decision Manager allows Siebel applications to access information and third-party predictive models through the Siebel Analytics Server. It is required that the Siebel Analytics Server you use for decisions reside on a dedicated machine or set of clustered machines to meet real-time processing requirements. To use real-time marketing offers, one option in each of the following is required:

- Siebel Marketing or Campaigns to create and format content
- Siebel Call Center, Siebel eMarketing, or other Siebel application to deliver content

Sort options available with the standard installation are available for use with Siebel Analytics. Offers can be filtered to return offers based on customer specific profile information or real-time behavioral scores.

To use Real-Time Marketing with Siebel Analytics, perform the following tasks:

- [Setting Up the Analytics Server on page 197](#)
- [Creating and Testing Decisions on page 201](#)
- [Sorting and Filtering By Scores Using Decision Broker on page 207](#)
- [Configuring the Decision Broker Business Service—Advanced on page 211](#)

Setting Up the Analytics Server

The Siebel Analytics Server must be configured before you can set up Real-Time Marketing. You need to configure a system containing the Siebel Marketing application, a Siebel Analytics Server, and third-party scoring engine software so that you can create decisions and use them in Siebel Marketing. For additional information, see *Siebel Analytics Installation and Configuration Guide*. To set up the Analytics Server, complete the tasks in the following sections:

- [Prerequisites for Setting Up Siebel Analytics](#)
- [Creating an Interface to a Third-Party Scoring Engine on page 198](#)
- Creating Siebel Analytics repository mappings. Allows Siebel Marketing to issue SQL queries to the Siebel Analytics Server that retrieve scoring information based on a customer, an account, or a household ID. For instructions, see the section about Marketing in *Siebel Analytics Installation and Configuration Guide*.

Prerequisites for Setting Up Siebel Analytics

The following products need to be installed and configured before attempting to use Siebel Analytics with Siebel Marketing:

- Siebel Marketing application
- Siebel Analytics Server
- Siebel Analytics Administration Tool
- Third-party scoring engine

Creating an Interface to a Third-Party Scoring Engine

To establish an interface to the scoring engine, you need to create an intermediate DLL that translates communications between Siebel Analytics and your third-party scoring engine software.

During processing, Siebel Analytics loads the customer-created intermediate DLL, passing in input parameters. The intermediate DLL packages (translates) the input parameters, invoking the third-party scoring engine software. When the third-party scoring engine software returns results, the results are packaged (translated) to return to analytics.

Intermediate DLL Code—An Example

This section contains an example of a framework (or skeleton) function. The framework illustrates the type of function that a customer needs to implement and the operations that the function usually performs. For more information, see *Siebel Analytics Installation and Configuration Guide*. Intermediate DLL code should define the following:

- A function named `SiebelAnalyticIterativeExecutionStatus`
- A structure named `SiebelAnalyticColumnMetaInfo`

To create an intermediate DLL you need to code the following logical steps:

```
#ifdef ITERATIVEGATEWAYDLL_EXPORTS
#define ITERATIVEGATEWAYDLL_API __declspec(dllexport)
#else
#define ITERATIVEGATEWAYDLL_API __declspec(dllimport)
#endif

typedef unsigned char uint8;

typedef enum SiebelAnalyticColumnType { VarCharData = 0 };

// This structure can currently support string types only
struct SiebelAnalyticColumnMetaInfo
```

```
{
wchar_t * columnName;

SiebelAnalyticColumnValueType columnValueType;

int columnWidth; // actual size of the column values in bytes for
both in/out

};

extern "C" ITERATIVEGATEWAYDLL_API
int ExecuteIterativeQuery (
/* [in] */ const wchar_t* modelId,
/* [in] */ const int inputColumnCount,
/* [in] */ const SiebelAnalyticColumnMetaInfo*
pInputColumnMetaInfoArray,
/* [in] */ const uint8* inputColumnValueBuffer,
/* [in] */ const int outputColumnCount, // actual count of columns
returned
/* [in/out] */ SiebelAnalyticColumnMetaInfo*
pOutputColumnMetaInfoArray,
/* [out] */ uint8* outputColumnValueBuffer)
{
// Retrieve the input column names, width, and values
// Retrieve the output column names and width
// Call third-party scoring engine DLL functions to retrieve the
outputs value
// Set outputs column width
// Package the outputs value into outputColumnValueBuffer
// Return
}
```

Table 46 describes the meaning of each parameter that is passed for the function that the customer needs to implement.

Table 46. Function Parameter Definitions

Term	Description
inputColumnCount	The number of input columns.
inputColumnValueBuffer	A buffer of bytes containing the value of the input columns. The actual size of each column value is specified in the columnWidth field of the SiebelAnalyticColumnMetaInfo. The column values are placed in the buffer in the order in which the columns appear in the pInputColumnMetaInfoArray.
modelId	An optional argument that the user may specify in the Search Utility box in the XML tab of the Physical table.
OutputColumnCount	The number of output columns. pOutputColumnMetaInfoArray is an array of meta column information for the output column. SiebelAnalyticColumnMetaInfo is declared in the public header file IterativeGatewayDll.h that we ship with Siebel Analytics. The caller of the API provides the column name and the call recipient sets the data type of the column (currently we only support VarCharData) and the size of the column value.
outputColumnValueBuffer	A buffer of bytes containing the value of the output columns. The actual size of each column value is specified in the columnWidth field of the SiebelAnalyticColumnMetaInfo. The column values must be placed in the buffer in the order in which the columns appear in the pOutputColumnMetaInfoArray.
pInputColumnMetaInfoArray	An array of meta information for the input columns. SiebelAnalyticColumnMetaInfo is declared in the public header file IterativeGatewayDll.h which we ship with Siebel Analytics.

Creating Siebel Analytics Repository Mappings

For instructions, see the section about Marketing in *Siebel Analytics Installation and Configuration Guide*.

Creating and Testing Decisions

Decision Manager and the associated Decision Broker business service allow you to create and execute SQL queries against the Siebel Analytics Server to obtain a real-time score or result. The Decision Administration screen and Decision Wizard allow you to create the SQL request and the specification for real-time variables.

Before creating a decision you need to map the appropriate information in the Siebel Analytics Server. For more information, see [“Setting Up the Analytics Server” on page 197](#).

You can create a decision using the Decision Wizard that is started in the Decision Administration screen, or by using step-by-step procedures in the Decision Administration screen. This section contains the following procedures for creating and deleting a decision in the Decision Administration screen:

- [Using the Decision Wizard to Create a Decision](#)
- [Creating and Deleting a Decision Record on page 202](#)
- [Testing a Decision on page 206](#)

Using the Decision Wizard to Create a Decision

Clicking Decision Wizard starts a wizard that provides a guided method for creating a decision.

- 1** From the application-level menu, choose View > Site Map > Decision Administration > My Decisions.
- 2** In the Decisions list, click Decision Wizard.
- 3** Follow the Decision Wizard instructions to create the decision.

For additional information, see [“Creating and Deleting a Decision Record” on page 202](#).

Creating and Deleting a Decision Record

If you want to use the result of the decision in a Siebel Real-Time Marketing process, the decision should have a status of Released. After a decision has been released, you should not delete it.

To create a decision

- 1 From the application-level menu, choose View > Site Map > Decision Administration > My Decisions.
- 2 In the Decisions list, create a new record.
- 3 Complete the fields using the information in [Table 47](#), at the end of this procedure.

The name must be unique and the description should help others understand how the decision will be used.

- 4 Click the Identifiers view tab,
- 5 In the Identifiers list, create a new record and complete the fields using information in [Table 47](#).

In the Name field, you can select multiple identifiers. These values will be used as part of the WHERE clause in the SQL query. For example, if the decision will be run for each customer, then select the Customer ID.

- 6 Click the Real-Time Inputs view tab.
- 7 In the Real Time Inputs list, create a new record and complete the fields using information in [Table 47](#).

Select real-time values from the personalization profile that will be used by a model or calculation.

- 8 Click the Outputs view tab.

- 9 In the Outputs list, create a new record and complete the fields using information in [Table 47](#).

In the Name field, select a single value as the output. This value will be used as part of the SQL query select statement clause. For example, select output from the table specified where identifier is equal to the customer ID. This will allow the decision request the result or value of a particular field or column.

Table 47. Decision Fields

Field	Decision Administration Views	Description
Default Value	Identifiers and Real Time Inputs	Used during decision testing and when no value is passed or available to the decision.
Name	All views	Can select multiple values. Used in the WHERE clause of the SQL query. For example, the customer ID identifier allows the decision request to obtain information about that customer.
Profile Name	Identifiers and Real Time Inputs	Select the value from the drop-down list. In the Identifiers list, it is used to associate a profile attribute value with identifier that will be used in the construction of the actual SQL select statement.
Server	Decisions	Required. The name of your Analytics Server. For information, see “Defining Data Source Names” on page 35 .
Status	Decisions	Required. When the decision is working properly, change the status to verified. Other values are: <ul style="list-style-type: none"> ■ Unverified. Default value. You can delete decisions in this status. ■ Verified. Change after you confirm that the decision is working properly. ■ Released. You can use for any application. ■ Retracted. Currently in use, but you should not use this in any new applications. ■ Inactive. Not currently used. Can be deleted.

Table 47. Decision Fields

Field	Decision Administration Views	Description
Subject Area	Decisions	Required. The drop-down list shows the tables for the server that you selected in the Server field. Choose the table in which you created the decision identifier and output columns.
Test Result	Outputs	Read only. This column will be populated with the results of a test.

Creating a Decision That Produces a Score (Example)

You can use the values in the following list to create a decision.

- 1 Create a decision with the following values:

Field	Value
Name	ScoreOffer
Server	ScoreServer
Subject Area	Siebel

- 2 Create first Identifiers with the following values:

Field	Value
Default Value	1
Name	ContactId

- 3 Create second Identifiers with the following values:

Field	Value
Default Value	1
Name	OfferID

- 4 Create Outputs with the following values:

Field	Value
Name	Score

Your SQL field value result should be the following statement:

```
Select Score from Siebel.OfferScore where ContactId = '%' And OfferId = '%'
```

Deleting a Decision

Someone might be using a decision in Released status. Deleting it might cause the application to function improperly.

CAUTION: Only decisions with a status of Inactive, Unverified, and Verified can be deleted. Decisions in Retracted status should not be deleted because they may still be used.

To delete a decision

- 1 From the application-level menu, choose View > Site Map > Decision Administration > My Decisions.
- 2 In the Decisions list, select a decision.
- 3 Click the menu button and select Delete Record.

Testing a Decision

The test feature in decision administration allows you to confirm that your decision and model are functioning properly. You can test the decision using default values for identifiers and real-time inputs. This test produces a result in the Results field and populates the Test Time field with the number of seconds it took to complete the operation.

Execute several tests, each with different values in the Default Value field to make sure that the decision produces the desired results. For example, if you know that a default value of two in a certain field should make the output score low, then type 2 in the default field for the variable and test the decision. All the Default Value fields must have values for a test to execute successfully.

After you create and test your decision, you are ready to use it in an application. Two ways to use a decision are to associate it with an offer or use a field in the user interface to guide the decision-making process.

- **Associating decisions with offers.** If the decision and model provide the probability to respond to a particular offer, then you can associate the decision with an offer in the offers detail view by selecting the offer, and then selecting the decision name in the decision field.
- **Use a field in the application.** If the decision is for a behavioral score, then you might add a field to the user interface to help users make decisions during customer interactions.

To test a decision

- 1** From the application-level menu, choose View > Site Map > Decision Administration > My Decisions.
- 2** In the Decisions list, select a decision.
- 3** Click Test Decision.

Sorting and Filtering By Scores Using Decision Broker

You can sort and filter offers based on real-time behavioral scores and customer profile information. The following topics show you how to set up personalization rules and Decision Manager to deliver real-time scores to Siebel eBusiness Applications.

- [Sorting on Real-Time Behavioral Scores](#). If you want decision scores to be generated for offers that will be presented to a user, a decision must be associated with the offer and the Offer Score field must be included in the active sort specification.
- [Filtering on Dynamically Calculated Data on page 208](#). You can establish personalization rules to filter offers based on customer profile information. Profile attributes can be dynamically calculated using Siebel Decision Manager (Analytics).

Sorting on Real-Time Behavioral Scores

One way to sort offers is by using a score that indicates that a customer might respond to or purchase from an offer. If the scores generate using real-time information, then the score reflects the most current information that you have about the customer's preferences. For more information, see [“Sorting an Offer List Dynamically Using Profile Information” on page 189](#).

For example, [Table 48](#) shows how the sort-by-score method sorts the offers for a qualified customer.

Table 48. Sort by Score

Offer Name	Score
X3000 Phone for \$200	.88
1000 Minutes for \$20	.75
2001 Model Phone for \$400	.56
7000 Minutes for \$75	.45
2000 Model Phone for \$300	.12

Filtering on Dynamically Calculated Data

You write personalization rules that use these calculated dynamic profile attributes to specify filter specifications and sort specifications for the offers to be presented to contacts. For more information, see [“Filtering an Offer List Dynamically Using Profile Information”](#) on page 191.

If the expressions use dynamic profile properties created during the Decision Manager set-up process, make sure you use exactly the same property names in your expression statements or the rule will not work. For more information, see [“Creating and Testing Decisions”](#) on page 201.

To filter on dynamically calculated data

- 1 Create a Personalization Rule Set with one or more rules to execute a decision using the Decision Broker Service.`ExecuteDecision` business service method.

[Table 49](#) contains a description of the rules fields.

- 2** Include the profile attributes returned by the Rules invoked in [Step 1](#) in the Conditional Expression, the Include Expression, or the Exclude Expression in another personalization rule designed for filtering the offers.

Outputs from a decision executed from a personalization rule are stored as a dynamic profile attribute with a name of the format [decision name].[decision output argument name]. For example, if a decision named GetChurnScore has an output argument named ChurnValue, then the result will be stored in a profile attribute named GetChurnScore.ChurnValue.

Table 49. Rules Fields for Executing Decisions

Field	Description
Active	TRUE
Business Service Context	the name of the Decision and any arguments required by the decision configuration based on your requirements. Examples: Decision = Get Customer Value Score Decision = GetChurnScore, ContactId = GetProfileAttr("Id")
Business Service Method	ExecuteDecision
Business Service Name	Decision Broker Service
Conditional Expression	Based on your requirements. <ul style="list-style-type: none"> ■ If you leave this property blank, this filter specification will apply to all users. (Not recommended.) ■ Anonymous users should always be excluded. To apply to certain users conditionally, type a suitable logic expression using profile attributes. For example: <code>GetProfileAttr('Me.Is Anonymous') <> TRUE</code>
Rule Type	Business Service
Sequence	Each rule should be assigned a number that establishes its order in the rule set. Each rule will be executed in sequence.

[Table 50](#) describes rules fields for offer filters.

Table 50. Rules Fields for Offer Filters Using Decision Customer Scores

Field	Description
Active	TRUE
Conditional Expression	Based on your requirements. To apply this filter specification to all users, leave this property blank (not recommended) Anonymous users should always be excluded using the following example: To apply to certain users conditionally, type a suitable logic expression using profile attributes. Example: GetProfileAttr('Me.Is Anonymous') < > TRUE AND GetProfileAttrAsNum('GetChurnScore.ChurnValue') > .85
Exclude Expression	Based on your requirements. Offer property criteria to exclude from the list if the Rule conditional expression is true. Example: [Inbound Priority] > = LookupValue("OFFER_PRIORITY", "4 - Low")
Include Expression	Based on your requirements. Offer property criteria to include in list if the Rule conditional expression is true. Example: [Margin] < = LookupValue("OFFER_MARGIN", "3 - Medium")
Rule Type	Expression
Sequence	Each rule should be assigned a number that establishes its order in the rule set. Each rule will be executed in sequence

Configuring the Decision Broker Business Service—Advanced

This option allows you to work directly with Siebel Analytics in an unrestricted way. Using direct access to the business service, you can integrate decisions into your application separately from Real-Time Marketing.

The Siebel Decision Manager uses the Decision Broker business service to execute decisions that retrieve information from the Siebel Analytic Server. The purpose of this section is to show how the Decision Broker business service can be invoked using workflow, personalization, Siebel VB script, and Siebel eScript. The results from any of these integrations can be used to create dynamic content, alter the flow of business processes, and so on.

Perform the following tasks:

- [Prerequisites to Configuring the Decision Broker Business Service](#)
- [Invoke Business Service Using Workflow—Example on page 212](#)
- [Invoking Decision Broker Using Personalization—Example on page 214](#)
- [Invoke Business Service Using Siebel VB Script—Example on page 216](#)
- [Invoke Business Service Using Siebel eScript—Example on page 217](#)

This section discusses the Decision Broker business service interface and the Decisions business component.

Prerequisites to Configuring the Decision Broker Business Service

Complete the following steps before you configure Decision Broker:

- Install and set up Siebel Analytics and Siebel Marketing.
- Map the required databases to the Analytics Server.
- Map the Server Name field to your Siebel Analytics repository DSN in Siebel Marketing. For instructions, see [“Creating Server Definitions” on page 79](#).

- Knowledge of Workflow, Personalization, Siebel Visual Basic and Siebel eScript are required to integrate the business server through each method. This section provides examples for each method that you can use and adapt to invoke the Decision Broker business service to meet your needs. For information about tools and programming languages required for integration, see the following resources:
 - *Siebel Business Process Designer Administration Guide* contains details about creating and maintaining workflow processes.
 - *Siebel Tools Reference* contains information about Siebel VB and eScript. For Tools overview information, see the section about server side scripting.
 - *Personalization Administration Guide* contains information about Siebel Personalization.
- Create a decision record. Make sure the decision record you want to invoke has been created in the Decision Administration screen. For instructions, see [“Creating and Testing Decisions” on page 201](#).

Invoke Business Service Using Workflow—Example

This section explains the integration of Siebel Business Process Designer (contains Siebel workflows) with the Decision Broker Service. If you understand the basics of Siebel business process design and infrastructure, using the following example will help you understand how to invoke the Decision Broker business service. For more information about Siebel workflows, see *Siebel Business Process Designer Administration Guide*.

This following example describes the steps you need to follow to invoke the Decision Broker business service from Siebel Business Process Designer.

NOTE: The decision you want to invoke must exist in the Decision Administration screen. For information about creating a decision, see [“Creating and Deleting a Decision Record” on page 202](#).

Create a workflow example in the Business Process Designer using the following information.

- **Create a new workflow process.** In the Business Process Administration screen, select Workflow Processes from the Show drop-down list. In the Workflow Processes list, create a new record and type a unique, descriptive name.
- **Create a graphical workflow in Process Designer.** In the Process Designer view tab, create a workflow using the following information:
 - Drag a Start object, a Business Service object, and an End object from the Palette to the Process Designer workspace.
 - Drag and connect a Connector object from the Start object to the Business Service object and the Business Service object to the End object.
- **Create process properties.** In the Process Properties list, create new records using the following list as a guideline:

Name	Data Type
[name of output argument1]	String
[name of output argument2]	String

- **Define the business service.** In the Process Designer workspace, double-click the New Business Service object. In the Business Service form, select values for the following fields using the following list as an example:

Field Name	Value
Business Service	Decision Broker
Method	Execute

- In the Input Arguments list, create a single record using information in the following list as a guideline:

Field Name	Value
Input Argument	Decision

Field Name	Value
Type	Literal
Value	[decision name]

- In the Output Arguments list, create a record for each output argument that you created in the Process Properties list.

Property Name	Type	Output Argument
[name of the output argument1]	Output Argument	[name of the output argument1]
[name of the output argument 2]	Output Argument	[name of the output argument2]

- **Test your workflow.** Click Return to Designer and test your workflow. In the Process Simulator, click Start. Scroll down to the Process Property list and click the Process Property Name select button. The Process Property Value column should be empty for [name of the output argument1] and [name of the output argument2]. Click Continue until all steps have been tested. If the test completes successfully, the new workflow can invoke the business service and return results.

Invoking Decision Broker Using Personalization—Example

This example describes how you can invoke the Decision Broker business service by creating a personalization rule and using the rule set to invoke the Decision Broker business service.

NOTE: The decision you want to invoke must exist in the Decision Administration screen. For information about creating a decision, see [“Creating and Deleting a Decision Record” on page 202](#).

For detailed instructions, see *Personalization Administration Guide*. Use the following list to define your process:

- **Add a business service.** In the Personalization Administration screen, select the rule set for the applet that you wish to personalize. To invoke the Decision Broker business service, add a rule of type Business Service, making sure that the Active Flag is checked. In the More Info list complete the fields, using the following information:

Field Name	Value
Business Service Name	Decision Broker Service
Business Service Method	ExecuteDecision
Business Service Context	[name of decision you want to invoke]
Name	For example, Decision Broker Caller
Sequence	The number you assign should be higher than rules that must be executed before this step

- **Add personalization rules.** Use the following information as general guidelines and then save the rule sets. Test Decision.Finish and Test Decision.Size X are values used to test in this example. Use your output value using the following syntax:

[decision name].[output name].

Field Name	Rule Type	Include Expression
Decision Output 1 Prefix	Expression	". < b > < BR > Output Parameter '< Name > ' : "
Decision Output 1	Expression	GetProfileAttr('Test Decision.Finish')
Decision Output 1 Suffix	Expression	". < /b > < /div > "
Decision Output 2 Prefix	Expression	". < b > < BR > Output Parameter 'Size X' : "
Decision Output 2	Expression	GetProfileAttr('Test Decision.Size X')
Decision Output 2 Suffix	Expression	". < /b > < /div > "

- **Reload personalization rules.** Click the menu button and select Reload Personalization to apply the changes of the rule set to the Salutation Applet.

You can confirm your change by select the Home Page tab in a customer application that uses this business service.

Invoke Business Service Using Siebel VB Script—Example

This example covers invoking the Decision Broker business service from VB script. For detailed instructions about how to use Siebel VB Script, see *Siebel Tools Reference*.

Create a new business service and write a VB Script that will call the Decision Broker business service as part of its operations. The following example describes the process:

- **Add a business service.** In the Business Service Administration screen, select Details from the Show drop-down list. In the Business Service list, add a new business service, and save the record.
- **Add a VB Scripts record.** From the Show drop-down list, select Scripts. and create a new record. In the Business Service Scripts form, select Service_PreInvokeMethod as the Name and Siebel VB as the Programming Language.
- **Add custom VB code.** In the Business Service Scripts workspace, add your custom VB code, click Check Syntax, and correct any errors. Make sure that you save the script. so that the simulator for the test will run successfully. If you do not save the script, errors such as Method Not Supported will appear.
- **Add two methods.** From the Show drop-down list, select Methods. In the Methods list, add two new methods as shown in the following list:
 - Type test_ExecuteDecision as the method name and save the record.
 - Type test_getSqlStmt as the method name and save the record.
- **Test your new VB-based business service.**
 - Go to the Business Service Simulator view. In the Service Methods list, add a service for test. Select the name of your Business Service in the Service Name field and select test_ExecuteDecision in the Method Name field.

- (Optional because a default decision name is set as Test Decision exists in the business service.) In the Input Property Set list, add a new record. Set the Property Name to Decision and set the Property Value to a decision name such as Test Decision.
- In the Service Methods list, click Run.
- You should see the results in the Output Property Set list.
- Repeat this test process for test_getSqlStmt method, if needed.

Invoke Business Service Using Siebel eScript—Example

This example covers invoking the Decision Broker business service from Siebel eScript. An example business service is defined in eScript and it will be used to invoke the Decision Broker business service. Both methods (ExecuteDecision and getSqlStmt) of the Decision Broker Service are shown as part of the example. For detailed instructions about how to use Siebel eScript, see *Siebel Tools Reference*.

Write a business service using eScript that will call the Decision Broker Business Service as part of its operations. The following example describes the process:

Add a business service. In the Business Service Administration screen, select Details from the Show drop-down list. In the Business Service list, add a new business service and save the record.

- **Add an eScripts record.** In the Business Service Administration screen, select Scripts from the Show drop-down list, and create a new record. In the Business Service Scripts form, select Service_PreInvokeMethod as the Name and eScript as the Programming Language.
- **Add your custom eScript code.** In the Business Service Scripts workspace, add your custom eScript code. Make sure that you save the script so that the simulator for the test will run successfully. If you do not save the script, errors such as Method Not Supported will appear.
- **Add two methods.** From the Show drop-down list, select Methods. In the Methods list, add two new methods as shown in the following list:
 - Type test_ExecuteDecision as the method name and save the record.
 - Type test_getSqlStmt as the method name and save the record.

- **Test your new eScript based business service.**
 - Go to the Business Service Simulator view. In the Service Methods list, add a service for test. Select the name of your Business Service and select test_ExecuteDecision in the Method Name field.
 - (Optional) because a default decision name is set as MyTest exists in the business service. In the Input Property Set list, add a new record. Set the Property Name to Decision and set the Property Value to a decision name such as MyTest.
 - In the Service Methods list, click Run.
 - You should see the results in the Output Property Set list.
 - Repeat this test process for test_getSqlStmt method, if needed.

Testing Campaigns with the My Offer View

You can use the Offers screen and views to test Real-Time Marketing campaigns, offers, and the associated personalization rules and decisions. In the Offers screen, the My Offers view lists offers appropriate for the current login user. In this way, a marketing administrator can verify that decision scores, dynamic sorting and filtering, and offer group rejection configurations are setup properly. The Offer Score column allows you to view the actual score returned from the decision if one is associated with the offer. The Reject Offer button creates a Rejected response record for the selected offer and the login user. When you return to this view, the Reject Flag column contains a value of Y, for offers that will not appear to the user.

It is recommended that you add a test user (the marketing manager or another user) to the campaigns that you are configuring so that you can test the scoring and rejection mechanisms using the My Offer view.

To make this view available, associate the test user with the My Offer View.

To associate responsibilities with My Offer View

- 1 From the application-level menu, choose View > Site Map > Application Administration > Responsibilities.
- 2 In the Responsibility list, select the desired responsibility.
- 3 For example, Siebel Administrator or Marketing Manager.
- 4 In the View list, create a new record and select the My Offer View view.

Defining Filter and Segment Criteria

9

Siebel Marketing's point-and-click Segment and Filter editors allow you to create complex expressions for campaign inclusion and exclusion without the need for in-depth familiarity with the physical database.

Using the Filters Detail and Edit Segment views, you can build criteria expressions using predefined measures, database fields, attribute values, and bucket values as criteria. Logical operators such as AND, OR, and NOT allow you to construct compound expressions.

When you want to select all contacts from an external table, you still need to define at least one segment criteria in your segment. A segment must have at least one segment criteria.

If you install and initialize the Siebel Analytics product, you can use Visual Segmentation (a graphical design tool) to create segments.

Although filters are commonly viewed as suppression tools, Siebel Marketing does not use them to resolve duplicates (deduplicate). In Siebel Marketing, filters can prevent some potential customers from being included in the snapshot (the target data set) for a marketing program stage. While creating a snapshot, the Marketing Server automatically eliminates duplicates of qualified persons who fall into more than one segment during segment allocation. This means that a contact will be assigned to only one campaign within a stage.

While segment criteria determine which contacts and customer data are included in the snapshot, filters prevent those who do not qualify from being included in the snapshot. Filters use inclusion or exclusion criteria to restrict the snapshot data to only those contacts which satisfy the filter criteria. For more information on snapshots, see [Chapter 16, "Generating and Maintaining Snapshot Files."](#)

The following describes a typical business scenario for using filters and segments:

A marketer for a telecommunications company plans to roll out a campaign that provides a discount on long distance access for profitable cell phone customers within a certain area. Before performing segmentation to target her best customers, the marketer designs a filter that will be applied to the account data. The filter will include the residents of a particular state, but exclude every record flagged with a “do not mail” preference.

Because many households have multiple cell phone accounts, the marketer plans to target the primary account, those customers with the largest monthly account balance in the last quarter, when defining segmentation criteria for the campaign offer.

The marketer would, however, like to include other elements in the snapshot to broaden the information being collected, so that if her initial query does not result in the desired segment counts, the criteria can be revised using the additional elements, without having to generate another snapshot.

Creating Filters and Defining Filter Criteria

A filter is a collection of inclusion and exclusion criteria that narrow the number of records in the source database that a snapshot will capture. Exclusion criteria are applied before inclusion criteria. For example, if a contact record meets the exclusion criteria, the record is not considered when Siebel Marketing performs the extraction of data for the snapshot. If your filter criteria specify that you only want to include residents of California and exclude records with a do-not-contact flag, those records are excluded before California records are included.

During snapshot generation, the filter expression is applied first. This includes or excludes groups of people, depending on the filters you create. Then segment criteria are applied, and contacts that meet the criteria are included in the segment counts.

The All Filters list displays defined filters. The read-only Inclusion and Exclusion boxes show filter criteria for the selected record. Criteria details for the selected filter may be viewed or edited by clicking the Filters Detail view tab.

Creating Filter Records

Filters are used at the stage level of a program plan and are optional. You should create a filter only if you need to restrict the overall data set to certain records. If your filters are too restrictive, you limit the records available for segmentation when you take a snapshot of your data.

To create filter records

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Filters.
- 2** In the All Filters list, create a new record.
- 3** Complete the necessary fields.
 - a** Type a name and description for the filter.
 - b** Click the Customer Hierarchy select button.

- c In the Pick Customer Hierarchy dialog box, select a customer hierarchy from the list of available customer hierarchies and click OK.

NOTE: If the filter criteria use custom measures or buckets that are specific to a customer hierarchy, you must select that hierarchy when you create the filter. This avoids integrity errors later when generating a snapshot.

After you have saved a filter record, you cannot change the customer hierarchy or select a customer hierarchy where none existed. If you do not select a customer hierarchy and then later decide to select a customer hierarchy for a filter, you must create a new filter and associate a customer hierarchy with the new record before you save it. You can copy, edit, or delete an existing filter. However, the customer hierarchy specified in the original filter cannot be changed.

- 4 Click the Stages select button to display the marketing program stages that use this filter.

A filter can be applied to more than one stage of a program.

If this filter has not been associated with a stage in a marketing program, the read-only Stages field will be blank.

Defining Criteria for Filters

The Filters Detail view allows you to define criteria for a new filter using previously defined attributes, buckets, measures, and database fields. This view may also be used to edit filter criteria, although changes in a filter's criteria do not take effect until the next snapshot of the data is performed.

The Filters Detail view displays the selected filter's information at the top. In the bottom left area, you select available values for Attributes, Buckets, Fields, and Measures.

The Criteria view tab allows you to construct simple or compound filter statements and then designate the expressions as inclusion or exclusion criteria.

Selecting Available Values for Filter Expressions

When you choose Attributes, Buckets, Fields, or Measures from the drop-down list, values are displayed in a tree pane. Choosing Measures from the list displays a select button for available measures and fields that you can use to select logical operators and provide values.

As you build a filter statement, expand the folders in the tree pane, click a value's check box to select it, or complete the measure fields.

Selected values have a check mark. To clear a value, click it again to remove the check mark. To select all values on a branch of the tree, select the first value and click Select Group.

Click Add to move the value to the Criteria workspace area. Then designate the expression as an inclusion or exclusion criteria by clicking Add To Inclusion or Add To Exclusion. Finally, click Validate & Save to verify the filter criteria syntax and save the record.

Building Filter Expressions

Use the following procedure to build inclusion or exclusion criteria expressions for your filters.

To build filter criteria

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Filters.
- 2 In the All Filters list, select the filter record and click the Filters Detail tab.
- 3 Choose criteria values for the filter, using [Table 51 on page 224](#).

CAUTION: Do not select measure, attribute, bucket, or field names containing the following characters: apostrophe ('), greater than (>), greater than or equal to (>=), less than (<), less than or equal to (<=), BETWEEN, colon (:), period (.), semicolon (;), or tilde (~).

- 4 Click Add to Workspace after each selection.

Each time you move a new value to the Criteria Workspace, it is separated from previous values by AND. Until the statements are moved to the Inclusion or Exclusion boxes, the statements will be joined by AND.

- 5 When you have finished building the statement, click Add To Inclusion or Add To Exclusion to move the criteria to the Inclusion or Exclusion boxes.
- 6 Click Validate & Save to authenticate the filter syntax and save the criteria.

Table 51. Criteria Values for Filters

Criteria	Comment
Attributes	From the Filter Details drop-down list, select Attributes. In the tree pane, expand the Attribute Hierarchies folder to display values and click the value's check box to select it.
Buckets	From the Filter Details drop-down list, select Buckets. In the tree pane, expand the buckets folder to display values and click a value's check box to select it.
Fields	From the Filter Details drop-down list, select Fields. In the tree pane, expand the Fields folder to display values and click the value's check box to select it.
Measures	<p>From the Filters Detail drop-down list, select Measures and in the Available Measures form, click the Measure select button.</p> <ul style="list-style-type: none">■ In the Pick Measure dialog box, select a predefined measure and click OK.■ Choose an operator, and type a number for Value 1.■ If the operator is BETWEEN, type a number for Value 2.

Combining Filter Statements

You can use logical OR operators to create compound filters.

To use OR in a filter expression

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Filters.

- 2 In the All Filters list, select the filter record and click the Filters Detail tab.
- 3 Create a filter statement, using the steps in [“To build filter criteria” on page 223](#).
- 4 Move it from the Criteria workspace to the Inclusion or Exclusion box, where the restriction is enclosed in parentheses.
- 5 Create another statement, and move the criteria to the same Inclusion or Exclusion box.

When you click Add To Inclusion or Add To Exclusion, additional filter criteria are separated from the original criteria with an OR operator.

- 6 Click Validate and Save to authenticate syntax and save the filter statement.

To remove statements from the Inclusion, Exclusion, or Workspace boxes

- 1 From the application-level menu, choose View > Site Map > Marketing Administration > Filters.
- 2 In the All Filters list, select the filter record and click the Filters Detail tab.
- 3 In the Exclusion or Inclusion box, double-click the expression to move it to the Criteria workspace.
- 4 In the workspace box, place the cursor in the expression, right-click and choose Delete or Delete All from the menu.
- 5 If you have created compound expressions in the Inclusion or Exclusion boxes perform the following steps:
 - a Double-click the first expression to move it to the workspace box and remove it completely from the workspace box before double-clicking the second expression.
 - b Double-click the second expression to move it to the workspace box and remove it completely from the workspace box.

Building Segment Definitions

Segments are collections of customers with common characteristics that are significant from a marketing or data analysis perspective.

Segment criteria, like filter criteria, are defined using expressions that represent the characteristics of the population you are targeting with offers. For example, segment criteria might be designed to locate customers with high account balances, who demonstrate brand loyalty and whose age is between 30 and 40 years old. When you define segments using Siebel Marketing's Segments views, you can make sure only those customers that meet the criteria are included in your target list. Segment criteria are applied to the data during snapshot generation after the data has been filtered.

Segment criteria can include bucket and attribute values, database fields, and numeric and date measures. You might create a complex segment by linking multiple attributes and measures using AND, OR, and NOT logical operators. You might also create a simple segment by using a single measure or attribute. Segments are reusable across marketing programs and are not tied to any specific list of customers.

You can modify segment criteria without having to regenerate the snapshot as long as the criteria do not require values from new fields or use new measures, or attributes. However, if you modify a segment's criteria to include a measure, field, or attribute that is not included in the current snapshot, the snapshot must be regenerated. In addition, if you modify the definition for a bucket or custom measure used in the snapshot, it must be regenerated.

Using the My Segments View

The My Segments view displays a subset of the segments available in the All Segments view. The My Segments view shows segments that either you or members of your team created. The All Segments and My Segments views consist of a list of available segments and the read-only Segment Criteria, which provides a view of the selected segment's expression.

Defining Segment Records

Use the following procedure to create a segment record and use the Edit Segment view to specify segment criteria. Do not create or use segments without defined criteria. Fields with an asterisk are required.

To define segments

- 1** From the application-level menu, choose View > Site Map > Segments.
- 2** In the Segments list, create a new record.
- 3** Type a name and description for the segment.
- 4** Accept the default source code (record ID) or type a new, unique source code for the segment.

The segment source code can be used in the Source Code format for the marketing program.

- 5** Click the Customer Hierarchy select button.
- 6** In the Pick Customer Hierarchy dialog box, choose a hierarchy and click OK.
You cannot change the customer hierarchy after the segment is saved.
- 7** Click the Targeting Level select button.
- 8** In the Pick Targeting Level dialog box, choose a level from within the selected hierarchy and click OK.

You cannot change the targeting level after the segment is saved. The selected level determines the availability of buckets and custom measures (at the selected targeting level or higher). For example, if you have a primary (top) level called Customer and a secondary (lower) level called Account and you select the Targeting level, only buckets and measures at this level are available. If you select the secondary level, Account, buckets and measures at the Customer and Account levels are available.

Working with Segment Definitions

The following procedures describe other ways to work with segment definitions.

To work with segment definitions

- To edit a segment definition, select the segment record in the All Segments (or My Segments) list and then click the Edit Segment view tab.

You also can drill down on the segment name hyperlink to open the Edit Segment view.

- To display a list of marketing programs and stages that use the segment definition, click the Programs view tab and then click the Program or Stage name hyperlink.

This hyperlink takes you directly to the programs list, or the programs stages view tab.

- To view a list of team members that can create or modify segment definitions, click the Team view tab.

Creating and Editing Segment Criteria

You can create and maintain segment criteria in the following ways:

- Using the Answers screen (Visual Segmentation). You can use this method if you install and use Siebel Analytics to create marketing segments. For more information see *Siebel Analytics Installation and Configuration Guide*.
- Using the Segments screen. Use this method when you plan to use an analytics tool other than Siebel Analytics to create segment criteria or if you want to edit segment criteria created using Visual Segmentation.

About Visual Segmentation

The Visual Segmentation feature allows you to use Siebel Analytics report criteria to create Siebel Marketing segments. This feature is only available after you install and configure Siebel Analytics. For more information see *Siebel Analytics Installation and Configuration Guide*.

The following conditions must exist to use Visual Segmentation:

- Siebel Server and Analytics Server must be running in the same network domain, for example, Siebel.com.
- The Web server component of Siebel Analytics should be running on the same machine as the Siebel Web server extension.
- If you use secure connections, such as those provided by HTTP, both Siebel Server and Siebel Analytics Server should be running in secure mode.

You can create segments in the following two ways:

- Use the Answers screen to define criteria for a report and create a segment from the report. You select columns (fields) and apply filters to the fields.
- Use Analytics screens to choose reports created in Siebel Analytics and create a segment from the report.

NOTE: You must be logged on to the Siebel Analytics Server to access these screens.

Using the Answers Screen

In the Answers screen, shown in [Figure 5](#), you use the Catalogs and Columns tabs in the left pane to select and define report criteria. The Catalogs tab allows you to select a subject area to create a new report or to select a prebuilt report. The Columns tab allows you to select columns (fields) as report criteria.

This section only discusses creating a marketing segment in the Answers screen. For information about the Answers screen and Siebel Analytics, see *Siebel Analytics User Guide* or display online help by clicking Help or the Help hyperlink in any view of the Answers screen.



Figure 5. Answers Screen

After selecting a subject area or a prebuilt report in the left pane, a blank report or the existing report columns appear in the right pane.

To add a column to the report, click a column in the Columns view tab in the left pane, and it appears in the right pane. To delete a column, click the column's delete icon. To add a filter for a column, click the column's filter icon. After selecting all desired columns, you create the segment.

Creating a Segment Using Visual Segmentation

This section describes the following tasks:

- Adding and deleting report columns.
- Creating a marketing segment.

To add and delete report columns

- 1** From the application-level menu, choose View > Site Map > Answers.
- 2** In the left pane, in the Catalog tab, perform one of the following steps:

- To define a new report, in the New Requests section, select a subject area.

In the left pane, the Columns tab automatically appears. In the right pane, a blank report appears. [Figure 6 on page 232](#) shows a report containing columns and filters.

- To modify an existing report, select the report.

In the right pane, the report columns appear.

CAUTION: If you modify an existing report, you will no longer be able to use the old version of the report. Before modifying a report, see [“Editing Segment Criteria” on page 234](#).

- 3** In the left pane, in the selected subject area, expand the desired folder (table) and click a column that you want to add to the report.

In the right pane, in the Request Columns view tab, the column appears.

- 4** To apply a filter to a column, click Filter By Column icon.
- 5** In the Create/Edit Filter form, complete the following steps:
 - a** In the Operator drop-down list select the operator.

Defining Filter and Segment Criteria

Creating and Editing Segment Criteria

- b** In the Value field, type the appropriate value or select a value from the All Choices list.

NOTE: To see a list of available values for the selected column, click the All Choices hyperlink at the right side of the screen.

- c** To delete a value, click the column's delete icon.
- 6** Click Finished.

NOTE: Repeat [Step 3](#) through [Step 6](#) for each column you want to add.

- 7** If you want to delete a column from the report, click the column's delete icon.

The screenshot displays the Siebel Answers interface for configuring a report. On the left, a 'Subject Area' pane is open for 'Bailey Bank QA', showing a tree view with 'CUSTOMERS' selected. Below it, a list of columns is visible, including CUSTOMER_ID, FIRST_NAME, LAST_NAME, ADDRESS, CITY, STATE, ZIP, TELEPHONE, BIRTH_DATE, GENDER, ETHNICITY, MARITAL_STATUS, EDUCATION, NUM_VEHICLES, HOME_OWNER, HOME_VALUE, and ANNUAL_INCOME. The main workspace is titled 'Untitled Request' and has tabs for 'Criteria', 'Results', 'Views', and 'Advanced'. Under the 'Request Columns' section, two columns are selected: 'MARITAL_STATUS' and 'NUM_VEHICLES', each with a filter icon. Below this, the 'Grand Total' is set to 'Σ'. A 'Request Filters' section shows two active filters: 'MARITAL_STATUS less than or equal to 2' and 'AND NUM_VEHICLES equals 2'. Each filter has 'Edit' and 'Remove' buttons. At the bottom of the filters section, there are links for 'Go - Remove Columns - Clear Sorts & Totals'.

Figure 6. Report with Columns and Filters

After adding columns and filters, you can create a marketing segment.

To create a marketing segment from a report

- 1** From the application-level menu, choose View > Site Map > Answers.

- 2** In the Answers screen, make sure the report you want to use appears in the right pane and click the Results view tab to test the report.
- 3** In the Results view tab, click Customize View.

NOTE: In this view you can customize the appearance of the Results view such as adding the logical SQL expression.

- a** To add the Logical SQL expression, in the Create View list, select the Logical SQL hyperlink.
- b** To add the Create Segment hyperlink, in the Other View list, select the Create Segment hyperlink.

NOTE: Title bars appear for each element that you select.

- 4** To rearrange the position of each section, use the arrow keys in each section's title bar.
- 5** At the top of the Results tab, click Show Results to see your changes.
- 6** When you are ready to create the segment, in the Results view tab, click the Create Segment hyperlink.

The Segments screen with a new record appears.
- 7** In the new record, you type a name for the segment, select a customer hierarchy and a targeting level, and step off the record to save it.
- 8** If you successfully create the segment, a confirmation message appears.

NOTE: You must complete every field listed in [Step 7](#) or you will not create the segment.

Editing Segment Criteria

The way you edit segment criteria depends on several factors. Do you want to create a slightly different report and continue to use the original version? Do you want to change an existing report, for example, to make a correction to criteria?

If you modify an existing report, the segment associated with it will not reflect these modifications and you will no longer be able to use the that version of the report. Therefore, if you want to continue to use the existing report, do not modify it. This applies to reports you create in the Answers screen and reports created in Siebel Analytics.

- If you want to create a different report and continue to use the original version, do not modify the original. Create a new report with the new report criteria using [“To add and delete report columns” on page 231](#) and [“To create a marketing segment from a report” on page 232](#).
- If you want to replace the original report, use one of the following ways:
 - Modify the original report using instructions in [“Creating a Segment Using Visual Segmentation” on page 231](#).

NOTE: If you use this method, you will no longer be able to use the old version of the report and the original segment record created in [Step 7 of “To create a marketing segment from a report” on page 232](#) should be deleted.

- Modify segment criteria using [“Defining Segment Criteria on the Segments Screen” on page 235](#).

Creating a Segment Using Prebuilt Reports

You create prebuilt reports using Siebel Analytics. To create a segment, you can use these reports as defined or modify them to match your business needs. For information Siebel Analytics, display online help by clicking Help or the Help hyperlink in any view of the Answers screen.

In addition, you can put these reports on a dashboard in Siebel Marketing and create segments using the reports. For more information, see *Siebel Analytics User Guide*.

To create a segment using a prebuilt report

- 1 Navigate to the screen that contains the report that you want to use.
- 2 Click Create Segment.
- 3 In the new record, you type a name for the segment, select a customer hierarchy and a targeting level, and step off the record to save it.

Using the Segments Screen

In the Segments screen, segment details appear in the Segment form. To edit information, change the values in the Segment form. To create a different segment, create a new record.

The Edit Segment view tab allows you to build, view, and edit segment criteria. This view provides access to attribute values, bucket values, database fields values, and numeric and date measures by selecting values from the Attributes drop-down list.

Defining Segment Criteria on the Segments Screen

The method for defining segment criteria is much the same as the method for defining filter criteria. Use the Attributes drop-down list to choose Attributes, Buckets, Fields, Numeric Measures, or Date Measures. To transfer values to the Criteria workspace box, place your cursor in the Criteria workspace where you want to insert a value, select or type a value, and click Add. If you want to choose a range of values, click Select Group and choose values.

NOTE: The Criteria view tab contains the workspace box where you build complex definitions using AND, OR, NOT, and () logical operators.

When building segment criteria, follow the following rules:

- After adding criteria, click the AND or OR logical operator before adding more members or measures. If you are using NOT, add the criteria statement first and click NOT to negate it.

- Whenever possible, surround multiple selections with parentheses. The open and close parentheses will be placed on the line below the cursor position. Place the cursor on the line above the line on which you want the open or close parenthesis and click the corresponding parenthesis.
- When you have completed the segment definition, click **Validate & Save** to commit the segment criteria. This process validates the syntax of the segment criteria, checking for missing parentheses, and so on.
- To delete segment criteria, place the cursor on the line to be deleted, right click and choose **Delete**, or **Delete All**.

To build segment definitions

- 1** From the application-level menu, choose **View > Site Map > Segments**.
- 2** In the Segments list, select the segment for which criteria will be defined.
- 3** Click the **Edit Segment** view tab or drill down on the segment name.
- 4** In the Attributes form, in the Attributes drop-down list, select one of the items from which you want to choose a value.
- 5** In the tree list, expand the folders to display the values.
 - To select a single value, click a value's check box.
 - To select a range of values, click **Select Group** and select a range of values.Selected values will have a check mark. To discard a value, click the selected value's check box again to remove the check mark.

If the object you want is not listed, refer to the Customer Hierarchy view and see to which targeting level it belongs. Your marketing or database administrator may have to create the object for the selected Customer Hierarchy.
- 6** Click **Add** to transfer the values to the Workspace box.

Criteria values are added to the line following the cursor position.
- 7** If your segment requires a measure or date measure, choose **Numeric Measure** or **Date Measure** from the drop-down list to display the measure-builders.
- 8** When you have finished defining the segment criteria, click **Validate & Save**.

To create numeric measure criteria

- 1** From the application-level menu, choose View > Site Map > Segments.
- 2** In the Segments list, select the segment for which criteria will be defined.
- 3** Click the Edit Segment view tab or drill down on the segment name.

The Edit Segment view appears with the Attributes tab and tree list as the default.
- 4** From the drop-down list, choose Numeric Measures.
- 5** In the Numeric Measures form, shown in the following illustration, complete the fields.
 - a** Click the Name select button.
 - b** In the Pick Measures dialog box, select a measure and click OK.

The measure name appears in the name field.
 - c** Click the Operator select button, and choose a logical operator from the list.

Options are =, < >, >, <, > =, < =, and BETWEEN.
 - d** In the Value 1 field, type a number.
 - e** If BETWEEN is the operator, type a number in the Value 2 field.
- 6** Click Add to transfer the measure value to the Criteria workspace.
- 7** Click Validate & Save.

To create date measure criteria

- 1** From the application-level menu, choose View > Site Map > Segments.
- 2** In the Segments list, select the segment for which criteria will be defined.
- 3** Click the Edit Segment view tab or drill down on the segment name.

The Edit Segment view appears with the Attributes tab and tree list as the default.
- 4** From the drop-down list, choose Date Measures.

- 5** In the Date Measures form, complete the fields.
 - a** Click the Name select button.
 - b** In the Pick Measures dialog box, select a predefined measure and click OK.
 - c** In the Value (Days) field, click the select button and use the calculator controls to type the number of days.
 - d** Click the Operator select arrow, and choose BEFORE or AFTER from the list.
 - e** In the Value (Date) field, click the select arrow and use the calendar to type a date or select the Run Date check box if you plan to use the server run date.
- 6** Click Validate & Save.

NOTE: The Date Measure value must be greater than January 1, 1970.

For example, to capture every response in the last seven days, based on the server run date, the Date Measure fields would contain the following values:

- Measure: Response Date
- Value 1 (Days): 7
- Operator: Before
- Run Date box: Selected

Wildcard Searches for Attributes and Fields

Using the Edit Segment's Attribute Search and Field Search functions, you can perform a wildcard search for fields or attribute level values with certain characteristics, without having to manually select individual values in the Attributes or Fields tree lists.

For example, you might want to select states whose name begins with the letter A. Using the Attributes tree pane, you might expand the folders to reach state values, and then choose individual states such as Alabama and Alaska. Using Attribute Search, you might select the state values folder, and specify search criteria of A* to automatically select qualifying states. Because you are not selecting values individually, no values appear for the attributes or fields in the Attributes Search or Fields Search lists.

Valid search characters are asterisk (*) and the number symbol (#).

- An asterisk (*) in the search pattern results in a match containing more than one character in the value.

If the search value is City = C*, the search returns Charleston, Columbia, Chicago, and so on.

- A number sign (#) in the search pattern results in a match containing exactly one character in the value.

If the search value is VALUE = M#Y, the search returns MAY, MEY, MeY.

- Search pattern values are case sensitive, for example, V* will produce different results than v*.
- A combination of * and # can be used in the search pattern, but only when using the equal (=) operator.

Table 52 shows an example of wildcard results when searching for a State field in a Customers table.

Table 52. Wildcard Search for Attribute and Field Values

Customers.State (values)	Wildcard Search = V* (result)	Wildcard Search = V# (result)	Wildcard Search VALUE=V*a
Virginia, VA, VT, Vermont, MD, Utah	Virginia, VA, VT, Vermont	VA, VT	Virginia

To perform a wildcard search for attributes

- 1 From the application-level menu, choose View > Site Map > Segments.
- 2 In the All Segments list, create a segment record and save it.

- 3 In the All Segments list, select the segment and click the Edit Segment view tab.

The segment form appears with the Attributes and Criteria panes in the lower half of the view.

- 4 In the Attributes tree pane, select Attribute Search from the drop-down list.

The view refreshes and the Wild Card Search entry field appears.

- 5 In the Wild Card Search field, type your search criteria.

- 6 In the Attributes tree pane, expand the folders to display values, and select the attribute level you want to find.

- 7 Click Add.

The attribute, including the search criteria is moved to the Criteria workspace.

- 8 When you have finished defining your segment criteria, click Validate & Save.

To perform a wildcard search for fields

- 1 From the application-level menu, choose View > Site Map > Segments.

- 2 In the All Segments list, create a segment record and save it.

- 3 In the All Segments list, select the segment and click the Edit Segment view tab.

The segment form appears with the Attributes and Criteria panes in the lower half of the view.

- 4 In the Attributes tree pane, select Field Search from the drop-down list.

The view refreshes and the Wild Card Search entry field appears along with the Fields tree list.

- 5 In the Wild Card Search field, type your search criteria.

- 6 In the Fields tree pane, expand the folders to display values, and select the check box for the field you want to find.

- 7 Click Add.

The field value, including the search criteria is moved to the Criteria workspace.

- 8 When you have finished defining your segment criteria, click Validate & Save

Creating and Using Offers **10**

Offers are a way to present content on product and services to current and potential customers as part of a campaign. Offers are associated with a campaign, and then presented to contacts and prospects when the campaign is launched. A campaign might focus on developing awareness of product branding, increasing or reinforcing product usage or customer loyalty, or it might contain a special offer on a new product related to products that customers have already purchased.

Offers can be reused in many campaigns, but the campaign is a one-time event that is associated with a marketing program stage.

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

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

In addition, you can design personalized HTML and text templates for email, eNewsletters, and Web Offers and create rules-based eNewsletters that deliver content based on contact and prospect attributes. Email and eNewsletter can contain embedded links to items such as Web offers, Web surveys, and forms, which allow the marketer to assess and capture campaign responses. Web Offers can contain embedded links to Web surveys, events and related URLs, downloads, and response forms.

Creating and Modifying Offers - Basic Steps

You can create offers in Siebel Marketing, Siebel eMarketing, and Siebel Campaigns. The All Offers list displays reusable offers that you define. You can create a new offer record and click the offer name hyperlink to add details, templates, literature, and so on. For information about using offer templates to create an offer, see [“Creating an Offer Template and Adding it to the Template List” on page 249](#).

Use the Show drop-down list to navigate directly to an offer type. The types of offers that are available to you depend on the features your company is licensed to use.

Creating an Offer

You can use the following procedure and table to create offers. For instructions about how to create eNewsletter offers, see [“Creating and Editing eNewsletter Offers” on page 264](#). After creating an offer you can associate an offer template with it.

To create an offer

- 1 From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2 In the All Offers list, add a new record.
- 3 Complete the fields, using [Table 53](#) as a guide.

Table 53. Selected Offer Fields

Fields	Comment
(Legal) Approved By	Indicates the Employee designated as the Legal approver. Only the creator of an offer can define the approver.
(Marketing) Approved By	Indicates the Employee designated as the Marketing approver. Only the creator of an offer can define the approver.
(Marketing, Legal) Approved Date	Each of these fields are automatically populated with the date that the marketing or legal designate approved the offer.

Table 53. Selected Offer Fields

Fields	Comment
Activation Date	Use the calendar controls to select the offer’s activation date. You can associate an inactive offer with a campaign, but when you launch the campaign, only active offers will be executed.
Create Activity check box	Used for email offer templates. Select this option to set activity logging. When the email is sent, an activity is created for each recipient of the email, stating that the email was sent. The activity record is created through the System Activity Object for either the Campaign Recipient or Campaign Position business components.
Delivery Profile	Used for email offer templates. Select the name of the communications profile from the list. The profile is used when sending the email. Profiles are created using the Communications Administration screen’s Communications Drivers and Profiles view. For details, see “Creating a Delivery Profile” on page 278 . If you want to send out HTML email offers, select a profile based on the Internet SMTP/POP3 Server driver. If you select a different driver, the HTML in your email may not be coded properly.
Description	Type a description of the offer.
Expiration Date	Click in the field and use the calendar controls to select the offer’s expiration date. Expired offers should not be associated with campaigns because they will not be sent out when the campaign is launched.

Table 53. Selected Offer Fields

Fields	Comment
Legal Approved	<p>When checked, this indicates that the designated person in the Legal Approved By field has approved the offer.</p> <p>The creator of the offer can select any employee as the designated approver of the offer. Only the creator of an offer can define the approver.</p> <p>When that approver logs in to the system, the approver can select the Legal Approved check box to approve the offer. No one else can approve the offer. The date field for the approval is populated automatically as soon as the approver selects the Legal Approved check box.</p> <p>The creator of the offer can change the approver name before approval. After the approver has approved the offer, however, the creator cannot modify the approver name.</p>
Marketing Approved	<p>When checked, this indicates that the designated person in the Marketing Approved By field has approved the offer.</p> <p>The creator of the offer can select any employee as the designated marketing approver of the offer. Only the creator of an offer can define the approver.</p> <p>When that approver logs in to the system, the approver can select the Marketing Approved check box to approve the offer. No one else can approve the offer. The date field for the approval is populated automatically as soon as the approver selects the Marketing Approved check box.</p> <p>The creator of the offer can change the approver name before approval. After the approver has approved the offer, however, the creator cannot modify the approver name.</p>
Name	Name of the offer.
Offer Code	This system-populated field contains a unique code to identify the offer. You can change this code, but make sure the new value is unique.

Table 53. Selected Offer Fields

Fields	Comment
Price List	<p>A previously defined price list can be associated with this offer.</p> <p>A marketer can create promotional prices for specific products. When an offer recipient clicks a product item hyperlink in an email or Web offer and goes to the product detail Web page, the recipient sees the promotional price that was defined using Siebel ePricer.</p> <p>The set of products associated with the selected price list can be different from the set of products defined in the offer's product list. When a contact responds to an offer, clicks a product link, and goes to the product detail page, the contact sees the promotional price that is defined for that product only if that product is a part of the price list that was selected for this offer. Otherwise, the contact will see the default price for the product.</p>
Subject Text	<p>Used for email offer templates. Type the text that will be used in the subject line of the email.</p> <p>You can include merge fields in the subject line if desired. For example: Exciting offer for [Field: M/M] [Field: First Name] [Field: Last Name].</p>

Table 53. Selected Offer Fields

Fields	Comment
Type	The channel used to distribute the offer, such as email, eNewsletter, fax, media, phone, Web, or direct mail.
Web Server	<p>Used for email offer templates. Type the URL (path) for the computer and directory on your Web server where the Siebel Web templates are stored.</p> <ul style="list-style-type: none">■ Template locations. When a contact clicks a Web offer, response form, or product catalog item in an email, a particular Web server receives that request. You must specify the Web server and directory where these templates can be found. A Web server URL looks something like the following: http://www.siebel.com/eMarketing■ Embedded links. When eMarketing encodes embedded Web offers, Web surveys, response forms, or product item links in an email, it assumes that the Web templates used for a particular offer, survey, response form, or product catalog are present at the specified URL.■ Event links. If you include an event link in your email, you must reference the Web Server for the Events views separately. The eMarketing Web Server must be first and the Events Web Server second, separated by a semicolon without a space before or after the semicolon. For example, your Web server field will look like the following: http://www.siebel.com/eMarketing;http://www.siebel.com/eEvents

Modifying an Offer

You can use the following procedure to modify offers. For instructions about how to modify eNewsletter offers, see [“Creating and Editing eNewsletter Offers”](#) on page 264.

To modify an offer

- 1 From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2 In the All Offers list, select the offer that you want to change.
- 3 Make the necessary changes, using guidelines in [Table 53 on page 242](#).

Applying Globalization Rules to Offers

Each offer record contains a language and a locale value. When you create an email or eNewsletter offer record, the language and locale values default to the values set in your profile. You can change the values to match your business needs. When you launch the campaign, the language and locale assigned to the email offer will be used for all recipients. When Communication Server processes an email request for this campaign, it identifies the language and locale of the first offer, changes to that offer's language and locale, and processes that offer and all associated offers using that language and locale.

Associating Products with Offers

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

To associate a product with an offer

- 1 From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2 In the All Offers list, select the offer and click the Products view tab.
- 3 In the Products list, create a new record.
- 4 In the Add Internal Products dialog box, select a previously defined product and click OK.

Creating and Editing Offer Templates

Offer templates are available in Siebel Marketing, Siebel eMarketing, and Siebel Campaigns. You can create a template using HTML tools or text editors such as Microsoft Front Page and Windows Notepad. After creating a template, you add the file to the template list, add embeddable objects (personalization elements), and associate the template with an offer. After you associate a template with an offer you can edit, verify, and preview text and HTML templates by drilling down on the template name hyperlink.

Offer templates can be associated with the following offer types:

- **Fax offers.** For more information on Fax offers, see [“About Fax Offers” on page 275](#).
- **Email offers.** When creating an email offer, you can use the Email Templates view tab to associate a template with the offer.
- **eNewsletter offers.** When creating an eNewsletter Offer, you can use the eNewsletter Section view tab to specify templates for each section of the newsletter. For more information about creating and editing eNewsletter offers, see [“Creating eNewsletter Offers” on page 265](#).
- **Web offers.** When creating a Web Offer, you can use the Edit Web Offer view tab to associate a template with the offer.

You can modify template files using your preferred HTML editor or Siebel HTML Editor. When you upload the changed template to the server, you overwrite the original template and all the offers associated with that template inherit the edited template.

Before a template has been added to (associated with) an offer, you can modify the template using your preferred HTML editor. After an offer template has been added to an offer, you can edit the template and add personalization elements in the Offers screen (Edit views).

CAUTION: You should establish a version-control policy for template changes. Any changes made to a template through the Edit views will appear in all of the offers that use that template.

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

- [Creating an Offer Template and Adding it to the Template List](#)
- [Using Hyperlinks \(HREF\) in an Offer Template on page 250](#)
- [Editing a Template That is Not Associated With an Offer on page 252](#)
- [Editing a Template That is Associated With an Offer on page 252](#)
- [Using Personalization Categories on page 256](#)
- [Associating a Template With an Email Offer on page 262](#)
- [Adding Attachments to Email Offers on page 263](#)

Creating an Offer Template and Adding it to the Template List

Offer templates are usually created with a file type of either ASCII text (.txt) or HTML (.htm or .html). You create the template using HTML tools and text editors such as Microsoft Front Page and Windows Notepad.

NOTE: You can create offer templates with other types of files such as PDF and DOC. Because you use offer templates primarily for email, Web, and eNewsletter offers. HTML and text files are the most common file types used.

After creating the template, you must add the new template to the Offer Templates list so that you can associate it with an offer.

To create an HTML or text offer template

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

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

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

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

NOTE: You cannot use HTML or embedded images in text email.

- 3 Add the template you created to the Offer Templates list using the following procedure, [“To add a template to the Offer Templates list.”](#)
- 4 Copy the images you embedded in your offer to the subdirectory you created or the image folder you referenced in [Step 2](#).

To add a template to the Offer Templates list

- 1 From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2 From the Show drop-down list, select Offer Templates.
- 3 In the Offer Template Files list, add a new record.
- 4 Complete the fields to add the offer template to the list.
 - a In the Name field, type a name for the template.
 - b In the File Name field, click the select button, navigate to the template file, and select it.

Using Hyperlinks (HREF) in an Offer Template

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

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

The link includes both the URL and the anchor, which is the text or image that appears in the template and links to the URL. Thus, if you want to create a link to the URL `http://www.siebel.com` and display Siebel Web Site as the text in the message, you must type the following:

```
<a href="http://www.siebel.com">Siebel Web Site</a>
```

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

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

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

For more information, see [“Using Personalization Categories” on page 256](#).

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

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

For example, instead of pasting `[Web Offer: Great Discount]`, the marketing manager can type the following:

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

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

Editing a Template That is Not Associated With an Offer

If you have not added a template to an offer, you can change it using the application that you used to create the file, for example, Microsoft FrontPage or Notepad.

To modify and upload an offer template file

- 1** Make the necessary modifications to the template file saved on your local drive, using the same text editor used to create the file.
- 2** Save and close the file.
- 3** From the application-level menu, choose View > Site Map > Offers > Offer Templates.
- 4** In the Offer Template Files list, select the template you just changed.
- 5** Upload the changed template file using the following steps:
 - a** Click the File Name select button.
 - b** In the Add Attachment dialog box, click Browse.
 - c** Select the file and click Open.

Editing a Template That is Associated With an Offer

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

- **Edit a template in the Offers screen.** Make basic changes to your template using Siebel HTML Editor or a text editor. In the Edit views of the Offers screen, you click Edit Template in the Edit Email, Edit Web Offer, Edit Fax, and Edit Section (eNewsletter Offers) view tabs.

If you created your template as an HTML file, Siebel HTML Editor displays the offer contents for editing.

If you created your template as a text file, a text editor displays the offer contents for editing. The offer appears with the merge fields inserted and the embedded links active. Previewing allows you to verify the offer's syntax, including merge fields and embeddable objects.

- **Modify a template using your default HTML editor.** Use to export the template file, make changes and import back into the Siebel file system. Examples of content editors are Microsoft Front Page and Notepad. For more information, see [“Editing a Template Using Your Default HTML Editor” on page 254.](#)

To edit an offer template in the edit views of the Offers screen

- 1 From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2 From the Show drop-down list, select the type of offer, for example Email Offers.
- 3 In the Offers list, select an offer and click the appropriate templates view tab.
- 4 Select the template you want to change and click the appropriate edit view tab.
- 5 Click Edit Template to open the template for editing and start the appropriate editor. One of the following editors starts:
 - **Text editor.** You use this tool to make simple changes to the text. The text editor starts by default, if the selected template is a text (.txt) file.
 - **Siebel HTML editor.** You can use this tool to make more complex changes than you can make in a text editor. The Siebel HTML editor starts by default, if the selected template is an HTML (.htm or .html) file. For more detail, see [“Using the Siebel HTML Editor” on page 254.](#)
- 6 To edit the contents of the template, click in the Template Contents workspace to display the editor’s toolbar.
 The editor’s toolbar does not display until you click in the workspace.
- 7 From the Personalization Categories list, select a category type (for example, Merge Fields), and then copy and paste personalization elements from that category into the email offer template.
 For details, see [“Using Personalization Categories” on page 256.](#)
- 8 When you finish making changes, click Save Template.
- 9 Click Verify & Preview to preview your changes and verify that the template still performs correctly.

Repeat [Step 5](#) through [Step 9](#) to continue editing the template.

Using the Siebel HTML Editor

You can use Siebel HTML Editor to make changes to your HTML template. To make more complex changes than allowed in the Siebel HTML Editor, see [“Editing a Template Using Your Default HTML Editor” on page 254](#).

To make changes using the Siebel HTML Editor, you type your changes directly in the workspace. In addition, you can use the editing toolbar at the bottom of the Template Contents workspace for formatting text. Most of the buttons on the toolbar are the same buttons that appear in standard text editing software. For more information about the export and import buttons, see [“Editing a Template Using Your Default HTML Editor” on page 254](#).

CAUTION: In the HTML editor, you must explicitly save your changes using one of the save functions in the application. You can click the Save Template button when it is available, or you can select Save Record after clicking a list or form menu button. The CTRL + S keyboard shortcut does not work in the HTML Editor workspace. If you want to use this keyboard shortcut, you must step off the editor into another field before clicking CTRL + S.

Editing a Template Using Your Default HTML Editor

If you want to make more complex changes or if you are more comfortable making changes in your HTML editor, you can export the template file, use your preferred (default) HTML editor, and import the file back into the Siebel file system. To use this method, perform the following tasks:

- Set your default HTML editor.
- Map the User Environment variable called TEMP to your local Temp folder.
- Edit a template file using your default HTML editor.

To set your default HTML editor

- 1** Open your Web browser.

- 2** Set your default HTML editor in the browser's user preferences.

For example, in Microsoft Internet Explorer, you find the HTML editor setting in the Tools application menu, using the following path:

Tools > Internet Options > Programs

- 3** Save your change.

To map the User Environment variable to your local temporary folder

- 1** From the Windows task bar, choose Start > Settings > Control Panel.
- 2** Double-click System and perform [Step 3](#) for Windows NT or [Step 4](#) for Windows 2000.
- 3** If you use Windows NT, perform the following steps.
 - a** Click Environment.
 - b** Select the User Variables window.
 - c** In the User variables for [username] workspace, in the Variables column, select TEMP.
 - d** Click Set.
- 4** If you use Windows 2000, perform the following steps.
 - a** Click the Advanced tab and click Environment Variables.
 - b** In the User variables for [username] workspace, in the Variables column, select TEMP and click Edit.
 - c** In the Edit Variables dialog box, in the Variables Value field, type c:\temp.
 - d** Click OK in each dialog box until you return to your desktop.

To edit a template file using your default HTML editor

- 1** From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2** From the Show drop-down list, select the type of offer.
- 3** Select an offer and click the appropriate templates view tab.

- 4** Select the template you want to change and click the appropriate edit view tab.
- 5** Click Edit Template to open the template for editing and start the appropriate editor.
 - a** To display the editor's toolbar, click in the Template Contents workspace.

The editor's toolbar does not display until you click in the workspace.
 - b** Edit the contents of the template.
- 6** In the HTML Editor toolbar, click the export button.

The default editor starts and the template file opens for editing.
- 7** In the Editor menu, choose save to save the template file on your local machine.

This saves the template file in your desktop/temp directory with the file name of template.htm.
- 8** Make changes to the template and save the file.

CAUTION: Do not change the file name. If you change the file name the application will not be able to automatically locate the file and you will have to manually locate the file and location while importing.

- 9** In the HTML Editor toolbar, click the import button.
 - a** In the Import dialog box, select the template you want to import and click Open.
 - b** By default, template.htm is automatically selected. If you need to import a different file, locate and select the appropriate file.
- 10** In the Edit Email list, click Save Template.

Using Personalization Categories

The Personalization Categories drop-down list contains the categories of supported embeddable object types. Depending on which category type you select, the lower list displays the available personalization elements of that category.

The available personalization categories are:

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

Each category has a number of personalization elements. For example, the Merge Fields category has the following personalization elements:

- [Field: M/M]
- [Field: First Name]
- [Field: Middle Name]
- [Field: Last Name]
- [Field: Account]
- [Field: Account Location]
- [Field: Job Title]
- [Field: Work Phone #]
- [Field: Home Phone #]
- [Field: Cellular Phone #]
- [Field: Fax Phone #]
- [Field: Email Address]
- [Field: Current Date]
- [Field: Source Code]

For Web offers, surveys, events, and URLs to be available as personalization elements within the Web Offers, Web Surveys, Events, and Related URLs categories, you must add the records to the Web Offers, Web Surveys Related Events, or Related URLs lists. For details, see [“Associating Web Offers, Web Surveys, Events, and URLs With Offers” on page 272](#).

You can copy any field from the Personalization Elements list and paste it into the body of the email message. For related information, see [“Using Hyperlinks \(HREF\) in an Offer Template” on page 250](#).

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

Using the Merge Fields category, you would select the personalization element [Field: First Name] and press CTRL + C to copy it. Then, you would paste (CTRL + V) the field or fields into the offer template text, or the subject line of the email. You would repeat this procedure to add a last name.

Typically, the tags for personalization elements are enclosed in brackets ([and]).

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

- The Merge Fields list is limited to the contact or prospect business component. This list can be extended using Siebel Tools by modifying the user property Substitution Field in the Campaign Recipient business component. Additional merge fields may be added through configuration.
- The list of Merge Fields includes a calculated field called Current Date. This merge field is replaced by the Campaign Send Date when the campaign is launched.
- The Product Catalog Items are limited to those defined for the Product catalog page for the products associated with the offer.
- The list of Web offers is limited to those defined for this offer in the Related Web Offers list (view tab).

- The list of Web surveys is limited to those defined for this offer in the Related Web Surveys view tab.
- The list of related events is limited to those events defined for this offer in the Related Events view tab. When you add a related event, you will only see events with active dates and that have a status code of Executing or In Progress.
- Related URLs allow you to embed hyperlinks to Web pages in an offer. These hyperlinks can contain commands such as GetContactId and GetOfferId that retrieve data elements and insert them in a related URL. Related URLs must start with http://. If the URL does not begin with http://, the Web server address is inserted at the start of the URL that you specified.

For example, you can create a related URL that looks like the following:

NOTE: There are no spaces in the following URL. It is typed as one string of characters.

```
http://www.siebel.com/  
response.asp?ContactId=[GetContactId]&OfferId=[GetOfferId]&Campa  
ignId=[GetCampaignId]
```

When the offer is rendered, the actual values for Contact ID, Offer ID, and Campaign ID are retrieved and substituted into a URL. The destination URL (<http://www.siebel.com/response.asp>) needs to be configured to parse the data elements passed and then take action. You perform this task outside of Siebel Marketing.

- Response forms are Web forms that a contact or prospect can use to respond to an offer through the Web. The response forms for an email offer are Request Unsubscribe, Request More Info, and Request Call Back.

About Email Offers

Email offers are available in Siebel Marketing. For instructions about how to create an email offer, see [“Creating an Offer” on page 242](#). For instructions about how to modify an email offer, see [“Modifying an Offer” on page 246](#).

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

The Email Offers view includes the More Info, Email Templates, Edit Email, Delivery Profile, Attachments, Related Web Offers, Related Web Surveys, Related Events, and Related URLs view tabs.

- **More Info.** This form contains additional fields that you can use if the email offer requires approvals from your company’s marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field, and allows you to specify the email offer’s Subject Text, the Delivery Profile (driver parameters) that will be used to distribute the offer, and the Web server path.
- **Email Templates.** This form allows you to attach templates containing the content of your email offer. To be selected in this view, templates must first be added to the Offer Templates list. For details, see [“Creating and Editing Offer Templates” on page 248](#).
- **Edit Email.** This form allows you to edit the template content as well as select Personalization Categories. Category elements can be copied and pasted into the template.
- **Delivery Profile.** This read-only list provides a list of delivery profiles (communications drivers) that are associated with the offer. For more information on communications drivers and profiles, see [“Using Delivery Profiles - Email, eNewsletter, and Fax” on page 277](#).
- **Attachments.** This list allows you to include literature items with your email offer. These items are delivered with the email when the campaign is launched.

- **Related Web Offers, Related Web Surveys, Related Events, and Related URLs lists.** These lists allow you to specify the Web offers, Web surveys, events, and URLs that you plan to include as hyperlinks in the email offer. Adding these elements allows you to embed them as a Personalization Element. Web Surveys are created using Siebel SmartScript. For more information, see *Siebel SmartScript Administration Guide*.

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

Associating a Template With an Email Offer

This section describes how to associate a template with an email offer. To edit the offer template, see [“Creating and Editing Offer Templates” on page 248](#).

To associate an offer template with an email offer

- 1** From the application-level menu, choose View > Site Map > Offers > Email Offers.
- 2** In the Email Offers list, select the offer and click the Email Templates view tab.
- 3** In the Email Templates list, create a new record.
- 4** In the Email Templates form, complete the necessary fields.
 - a** The sequence field is automatically populated. Change the sequence if you are adding multiple templates with rich and plain format. The sequence field includes email attachments. Therefore, when you add your first template, you can see a sequence number other than 1.

For example, if you have two templates (one HTML and one text) associated with the email offer, adjust the sequence so that you associate the plain format (text) first and the rich format (HTML) last. This satisfies the MIME Alternate standard. The MIME Alternate standard allows your customers to receive the HTML version if their email program supports HTML emails. If their email program does not support HTML, the customer will receive the text version of the offer.

- b** In the Template Name field, click the select button.
You can associate one HTML template and one text template to the offer.
 - c** In the Pick Offer Template dialog box, select the template record and click OK.
- 5** Save the record to associate the template with the offer.

Adding Attachments to Email Offers

Use the following procedure to add literature items as email offer attachments.

To add an attachment

- 1** From the application-level menu, choose View > Site Map > Offers > Email Offers.
- 2** In the Email Offers list, drill down on the offer name.
- 3** Click the Attachments view tab.
- 4** In the Attachments list, create a new record.
- 5** In the Attachments form, complete the fields.
- 6** Click the Name select button, select the literature file you want to attach, and click OK.
- 7** For each file, type an attachments label.

Creating and Editing eNewsletter Offers

eNewsletter offers are available in Siebel Marketing. Like email offers, eNewsletters can contain links to Web offers, Web surveys, related events, and related URLs. In addition they can contain personalized elements, such as a salutation. You can target specific customers with some sections of the eNewsletter, while other sections can be aimed at a more general audience.

Using the eNewsletter Offer and eNewsletter Rules views, you can create an eNewsletter that uses rules to determine the content the recipient sees. By applying rules-based criteria, you can create eNewsletter offers with sections that are only relevant to the campaign offer recipient and other sections that include details of interest to the general audience.

The eNewsletter Offer tabbed views allow you to identify links to related Web offers, Web surveys, events, and URLs. You can also edit rule-specific sections, identify a communications delivery profile, and attach relevant documents to the offer.

The eNewsletter view includes the following view tabs:

- **More Info.** This form contains additional fields that you can use if the eNewsletter Offer requires approvals from your company's marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field, and allows you to specify the Subject line text, Delivery Profile (communication driver parameters) that will be used to distribute the offer, and the Web server path.
- **eNewsletter Sections.** This list allows you to attach templates containing the section content for your eNewsletter. To be selected in this view, templates must first be added to the Offer Templates list. For details, see [“Creating and Editing Offer Templates” on page 248](#).
- **Edit Sections.** This form provides you with the means to edit the content of your section templates as well as select Personalization Categories, and copy and paste category elements into template content.
- **Attachments.** This list allows you to include literature items with your eNewsletter offer.

Because eNewsletters are delivered to target recipients using email, many of the procedures that describe how to create email offers are also valid for creation of eNewsletter offers. Thus, many of the view tabs such as Delivery Profile, Related Web Offers, and Related Web Surveys, use the same creation procedures and have the same functionality as in the Email Offers view.

For more information on creating communications drivers and profiles, see [“Using Delivery Profiles - Email, eNewsletter, and Fax” on page 277](#). For information on using Web offer and Web survey hyperlinks in the eNewsletter, see [“Associating Web Offers, Web Surveys, Events, and URLs With Offers” on page 272](#).

To create and edit eNewsletter Offers, perform the following tasks:

- [Creating eNewsletter Offers](#)
- [Adding eNewsletter Sections on page 266](#)
- [Resequencing eNewsletter Sections on page 267](#)
- [Editing eNewsletter Sections on page 268](#)
- [Developing eNewsletter Rules on page 269](#)
- [Adding Attachments to eNewsletter Offers on page 270](#)

Creating eNewsletter Offers

You create an eNewsletter offer, by performing the steps in [“Creating and Modifying Offers - Basic Steps” on page 242](#).

To create an eNewsletter offer

- 1** From the application-level menu, choose View > Site Map > Offers > eNewsletter Offers.
- 2** In the eNewsletter Offers list, create a new eNewsletter offer, and save the offer.
For details, see [“Creating and Modifying Offers - Basic Steps” on page 242](#).
- 3** Drill down on the eNewsletter Offer name hyperlink.
- 4** In the details form, complete other necessary fields for the eNewsletter offer including:

- The communications Delivery Profile. For details, see [“Using Delivery Profiles - Email, eNewsletter, and Fax” on page 277](#).
- The Web Server URL for your Siebel Marketing installation. Remember to include the Web server for eMarketing and Events when you include links to each one.
- The eNewsletter subject text with merge fields, if appropriate. For details, see [“Using Personalization Categories” on page 256](#).

Adding eNewsletter Sections

Before you create your eNewsletter, outline the sections you want to include, compose the content of each section and determine the contacts you want to target with each section. Use the eNewsletter Rules view to define and implement visibility rules for each section of the eNewsletter.

The eNewsletter Sections view lists the sections in the eNewsletter. The inclusion of each text or HTML portion of the eNewsletter is based on rules. You apply these rules in the eNewsletter Sections form by clicking the select button in the Rules field and choosing a predefined rule to apply to the section. The Sequence field shows the order that the sections will be presented in the eNewsletter after the rules are applied.

NOTE: If you have multiple templates associated with the eNewsletter offer that are both HTML and text, adjust the sequence with the plainest template format (text) first and the richest format (HTML) last on the list to satisfy the MIME Alternate standard. If your customer’s email program supports HTML emails, then they receive the HTML version. If it does not support HTML, the customer receives the text version of the offer. As long as the sequence of the sections within a type (like HTML) is correct, then Siebel Marketing will put the sections together in the right order.

To add an eNewsletter section and apply a rule

- 1** From the application-level menu, choose View > Site Map > Offers > eNewsletter Offers.
- 2** In the eNewsletter Offers list, select the offer.

- 3** Click the eNewsletter Sections view tab.
- 4** In the Sections list, create a new record.
The section form appears, with the sequence automatically set to 1.
- 5** In the eNewsletter Sections form, complete the fields.
 - a** Type a unique section name and a section description.
The sequence field is automatically populated. If you need to change the sequence of the section, type a new value.
 - b** Click the Template Name select button.
 - c** In the Pick Offer Template dialog box, select a section from the list of predefined section templates and click OK.
The File Type field displays whether the template is HTML or text.
 - d** Click the Rule select button.
 - e** In the Pick Rule dialog box, select the rule that controls whether this section is sent to an eNewsletter recipient and click OK.
If a description has been defined for the rule, it will appear in the Rule Description field.

Repeat the procedure, adding sections one at a time, and clicking save after each section has been defined.

Resequencing eNewsletter Sections

If you plan to resequence your eNewsletter sections, remember that you cannot assign a section to a sequence position that is already occupied by another section.

For example, if you wish to switch the sequence of sections 1 and 2, you must make sure that position 1 in the sequence list is vacant before you assign section 2 to that position.

To resequence eNewsletter sections

- 1** From the application-level menu, choose View > Site Map > Offers > eNewsletter Offers.

- 2** In the eNewsletter Offers list, select the offer, and click the eNewsletter Sections view tab.
- 3** In the Sections list, remove or reposition the section occupying the target position in the sequential list.
 - a** Select the section record, click the menu button and choose Edit Record.
 - b** Edit the number in the Sequence field, and save the record.
- 4** Add the new section, editing the Sequence number for the correct position on the list.
 - a** Create a new record.
 - b** In the Section form, click the Template Name select button and choose the section template.
 - c** In the Sequence field, adjust the number, and complete the other necessary fields.
 - d** Save the section record.

Editing eNewsletter Sections

The Edit Section view tab allows you to change the newsletter section template, select a personalization category with associated personalization elements, edit the template contents, and apply the rule that governs the section's visibility.

As with email offers, the list of personalization categories for eNewsletters includes Merge Fields, Product Catalog Items, Response Forms, Web Offers, Web Surveys, Events, and URLs. The only available type of response form for eNewsletters is Unsubscribe.

The Edit Section view includes two controls:

- **Edit Template.** Click Edit Template to edit the read-only section template displayed in the Edit Section view. This provides the same functionality that the corresponding control does in the Edit Email view.
- **Verify & Preview.** Click Verify & Preview to test the syntax of the edited template and display the actual eNewsletter offer section. This provides the same functionality that the corresponding control does in the Edit Email view.

For additional information, see [“Creating and Editing Offer Templates”](#) on page 248.

Developing eNewsletter Rules

The eNewsletter Rules view allows you to set up rules to determine which customers see each section of your eNewsletter. The Rules list displays the rules created for any eNewsletter section. Fields displayed include Name and Description. The conditions list displays conditions for the rule selected in the Rules list.

To create an eNewsletter rule

- 1** From the application-level menu, choose View > Site Map > Offers > eNewsletter Rules.
- 2** In the Rules list, create a new record.
- 3** Complete the fields, typing a name and description for the rule.

To create a condition for an eNewsletter rule

- 1** From the application-level menu, choose View > Site Map > Offers > eNewsletter Rules.
- 2** In the Rules list, select the rule.
- 3** In the Conditions list, create a new record.
- 4** Complete the Conditions fields.
 - a** Type a new value in the Sequence field if you want to modify the sequence of the rule.

The Sequence field determines the order in which a condition is evaluated for a specific rule. For example, a condition with a sequence of 2 is evaluated before a condition with a sequence of 3.
 - b** Click the Field select button.
 - c** In the Business Component Fields dialog box, select a field from the contact or prospect list of fields and click OK.

- d** Choose a Comparison operator from the list.

Options are = , > , < , < > , LIKE, NOT LIKE, > = , < = .

An example would be Account Location (business component field) = (comparison operator).

- e** Type the value to be compared, using wildcards if needed.

For example, CONTACT HOME PHONE NUMBER LIKE 415*.

- f** Choose AND or OR from the Next: list to set inclusion or exclusion criteria for the next condition evaluation.

For example:

Condition1: Contact Job Title LIKE *Manager* OR

Condition 2: Contact Job Title LIKE *Vice* OR

Condition 3: Contact Job Title LIKE *CEO*

NOTE: The rules criteria are case sensitive.

- 5** When you have finished defining a condition, save the record.

Adding Attachments to eNewsletter Offers

Use the following procedure to add literature items to your eNewsletter offer.

To add an attachment

- 1** From the application-level menu, choose View > Site Map > Offers > eNewsletter Offers.
- 2** In the eNewsletter Offers list, select the offer and click the Attachments view tab.
- 3** In the Attachments list, create a new record.
- 4** In the Attachments form, click the Name select button.

- 5** In the Pick Literature Item dialog box, select the literature file you want to attach to your email offer.

For each file, type an attachments label.

- 6** Save the record.

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

The ability to associate Web offers, Web surveys, Events, and URLs with offers is available in Siebel Marketing and Siebel eMarketing.

Each offer element (Related Events, Web surveys, Web offers, and URLs) can be associated with any offer type with one exception. Web offers cannot include links to other Web offers. However, you can relate the same Web offer to more than one email offer. For example you might have an eService Web Offer and want to associate that Web offer with multiple email offers. In this case, each of these email offers will have a link to that same web offer.

Use the Related Web Offers, Related Web Surveys, Related Events, and Related URLs view tabs to add each offer element to the appropriate offer. After you add an element to the list, it is available as a personalization element in the appropriate Offer view tab. For example, after you add a Web offer on the Related Web Offers view tab, you can navigate to an Edit view and select Web Offers in the Personalization Category field. Your newly added Web offer appears in the list of elements.

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

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

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

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

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

```
<a href="[*Web Offer: Introducing Siebel eService MidMarket Edition]">  </a>
```

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

```
<a href="[*Web Offer: Introducing Siebel eService MidMarket Edition]">Click here</a>
```

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

```
<a href="[*Web Survey: eMarketing-eService Survey]">
```

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

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

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

```
<a href="[*Product: Siebel eService, MME]">
```

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

- 1** From the application-level menu, choose View > Site Map > Offers.
- 2** In the Show drop-down list, choose the offer type with which you want to associate an offer element.
- 3** In the selected offers list, drill down on the offer name.
- 4** Click the view tab for the Web offer or offer element that you want to associate with the selected offer.
- 5** In the selected list, create a new record.

NOTE: Related URLs must start with http:// or the Web server address will be inserted.

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

About Fax Offers

Fax offers are available in Siebel Marketing and Siebel eMarketing. For instructions about how to create a fax offer, see [“Creating an Offer” on page 242](#). For instructions about how to modify a fax offer, see [“Modifying an Offer” on page 246](#).

Using the Fax Offer view, a marketer can create personalized faxes for targeted distribution during a campaign.

The Fax Offer view contains four view tabs.

- **More Info.** This form contains additional fields that you can use to specify a predefined communications Delivery Profile for fax distribution, an Activity check box that may be used to track the offer as an activity, and approval check boxes and fields if the fax offer requires approval from your company’s marketing and legal departments. The More Info form also displays a unique identifier for the offer in the Offer Code field.
- **Edit Fax.** This form allows you to choose an offer template and specify the personalization elements that are included in your fax design.
- **Delivery Profile.** This read-only list displays parameters of the Siebel Communications profile chosen for the fax offer. For more information on setting up a delivery profile for a fax offer, see *Siebel Communications Server Administration Guide*. For information on testing and distributing fax campaigns, see [“Testing Campaign Offers Before Launching a Campaign” on page 354](#).
- **Literature.** This list shows the company and product information associated with the media offer. You can add additional items to this list if desired. For more information, see [“Associating Literature with Offers” on page 284](#).

Associating a Template With an Fax Offer

This section describes how to associate a template with a fax offer. To edit the template, see [“Creating and Editing Offer Templates” on page 248](#).

To associate an offer template with a fax offer

- 1** From the application-level menu, choose View > Site Map > Offers > Fax Offers.
- 2** In the Fax Offers list, select the fax offer and click the Edit Fax view tab.
- 3** In the Edit Fax form, create a new record.
- 4** Click the Template Name select button.
- 5** In the Pick Offer Template dialog box, select the predefined template for the fax offer and click OK.

Only offer templates that you add to the Offer Templates list will be available for selection. For details, see [“Creating and Editing Offer Templates” on page 248](#).

- 6** Save the record.

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

Using Delivery Profiles - Email, eNewsletter, and Fax

Delivery Profiles are available in Siebel Marketing and Siebel Campaigns. They are required for fax, email, and eNewsletter offers. Delivery Profiles are created using the Communication Administration screen's Communications Drivers and Profiles view. Email and eNewsletters are sent out using the SMTP/POP3 communications driver, and fax offers are distributed using the fax communications driver provided with your fax application.

The Internet SMTP/POP3 communications driver, which supports HTML email and plain-text email, can be used for both inbound and outbound communications. It supports Internet mail servers that use the SMTP protocol for outbound email or the POP3 protocol for inbound email (applicable only to Siebel eMail Response).

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

Siebel Communications Server interfaces indirectly with this type of fax server through the host email system. Except for the email address format, it makes no difference to Siebel Communications Server whether it is sending an email or a fax.

Before email, eNewsletter or fax offers can be sent out, you must select one of the defined profiles. You select a profile from the Delivery Profile list in the More Info form for email, eNewsletter or fax offers.

You can view parameters and values for the delivery profile by selecting the email, eNewsletter or fax offer, and clicking the offer's Delivery Profile view tab.

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

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

Creating a Delivery Profile

Use the following procedure to select a communications driver and create a profile for email, eNewsletter, and fax offers.

CAUTION: If you want to send out HTML email offers, select a profile based on the Internet SMTP/POP3 Server driver. If you select a different driver, the HTML in your email may not be coded properly.

To create a delivery profile

- 1** From the application-level menu, choose View > Site Map > Communications Administration > Communications Drivers and Profiles.
- 2** In the Communications Drivers list, select a driver and click the Profiles view tab.

For example, for email and eNewsletter offers, select Internet SMTP/POP3 Server.
- 3** In the Profiles list, create a new record.
 - a** In the Name field, type a name for the new profile.
 - b** In the Organization field, accept the default organization, or click the select button and select another organization.
 - c** In the Responsibilities field, click the select button, and in the Responsibilities list, select the responsibility associated with profile access.

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

Associating a Delivery Profile With an Offer

Use the following procedure to associate a delivery profile with email, eNewsletter and fax offers.

To associate a delivery profile with an offer

- 1** From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2** From the Show drop-down list select Email, eNewsletter or Fax Offer.
- 3** Select the offer.
- 4** In the Delivery Profile field, select the delivery profile for the offer.
- 5** Save the record.

Working With Phone Offers

Phone offers are available in Siebel Marketing and Siebel Campaigns. For instructions about how to create a phone offer, see [“Creating an Offer” on page 242](#). For instructions about how to modify a phone offer, see [“Modifying an Offer” on page 246](#).

For information about working with phone offers, see the following topics:

- [About Phone Offers](#)
- [Creating Call Guides for Phone Offers](#)

About Phone Offers

The Phone Offers view allows you to define telemarketing offers that will be executed using Siebel Call Center or another application.

The Phone Offers view consists of three view tabs.

- **More Info.** This form contains more fields that you can use if the phone offer requires approvals from your company’s marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field.
- **Literature.** This list shows the company and product information associated with the phone offer. You can add additional items to this list if desired. For more information, see [“Associating Literature with Offers” on page 284](#).
- **Call Guide.** This text form allows you to add information about your offer. The Call Guide note field is visible to call center agents as they launch campaigns.

Creating Call Guides for Phone Offers

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

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

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

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

NOTE: A call script is written using Siebel SmartScript. You associate a script with a campaign at the campaign plan level. For more information, see [“Creating a Campaign” on page 322](#) and [“Using SmartScripts” on page 327](#). For information about creating smartscripts, see *Siebel SmartScript Administration Guide*.

To create a call guide

- 1** From the application-level menu, choose View > Site Map > Offers > Phone Offers.
- 2** In the Phone Offers list, select the phone offer and click the Call Guide view tab.
- 3** In the Call Guide text field, type the information you wish to use for the phone offer.

About Direct Mail Offers

Direct mail offers are available in the Siebel Marketing application. For instructions about how to create a direct mail offer, see [“Creating an Offer” on page 242](#). For instructions about how to modify a direct mail offer, see [“Modifying an Offer” on page 246](#).

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

You can generate output or distribution list of contacts during the marketing program execution. The customer information is arranged according to a predefined list format and the list can be delivered to the appropriate vendors through a predefined method (for example FTP or email). For more information about List Output and Vendors, see [Chapter 20, “List Management.”](#)

The Direct Mail Offer contains the More Info and Literature view tabs.

- **More Info.** This form contains additional fields that you can use if the Direct Mail Offer requires approvals from your company’s marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field.
- **Literature.** This list shows the company and product information associated with the offer. To add literature to the list, see [“Associating Literature with Offers” on page 284](#).

About Media Offers

Media offers are available in Siebel Marketing and Siebel Campaigns. For instructions about how to create a media offer, see [“Creating an Offer” on page 242](#). For instructions about how to modify a media offer, see [“Modifying an Offer” on page 246](#).

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

The Media Offers view contains the More Info and Literature view tabs.

- **More Info.** This form contains additional fields that you can use if the Media Offer requires approvals from your company’s marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field. You can specify the type of media you will use to distribute the offer using the Type field.
- **Literature.** This shows the company and product information associated with the media offer. You can add additional items to this list if desired. For example, if the media offer type is press release, you can associate the press release content with the offer for later referral. For more information, see [“Associating Literature with Offers” on page 284](#).

Associating Literature with Offers

Literature about the products or services offered during a campaign can be associated with a campaign offer using the Literature view tab in the Direct Mail, Media, Phone, and Fax Offer views. To add attachments to email offers, see [“Adding Attachments to Email Offers” on page 263](#). To add attachments to eNewsletter offers, see [“Adding Attachments to eNewsletter Offers” on page 270](#).

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

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

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

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

To associate a literature item with an offer

- 1** From the application-level menu, choose View > Site Map > Offers > All Offers.
- 2** From the Show drop-down list, select the appropriate offer type.
- 3** In the Offers list, select the offer and click the Literature view tab.
- 4** In the Literature list, create a new record.
- 5** In the Literature form, click the Name select button.
- 6** In the Pick Literature Item dialog box, select the literature and click OK.

About Web Offers

Web offers are available in Siebel Marketing and Siebel eMarketing. The Web Offers view allows you to create offers that can be used on your company's Web pages. For instructions about how to create a Web offer, see [“Creating an Offer” on page 242](#). To modify a Web offer, see [“Modifying an Offer” on page 246](#).

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

The Web Offers view includes the following view tabs:

- **More Info.** This form contains additional fields that you can use if the Web Offer requires approvals from your company's marketing and legal departments. It also provides a unique identifier for the offer in the Offer Code field.

NOTE: If you select the Inbound Active Flag check box, the Web Offer appears to eligible users in the eMarketing home page. The Featured Offers applet checks this flag before displaying a Web offer to an eligible contact or prospect.

- **Edit Web Offer.** This form allows you to attach templates containing the content of the web offer. To be selected here, templates must first be added to the Offer Templates list. For details, see [“Creating and Editing Offer Templates” on page 248](#).
 - **The Edit Templates button** allows you to edit the template content, as well select personalization categories, and copy and paste category elements into the template.
 - **The Verify & Preview button** verifies the template edits and displays the finished Web offer as it will appear on the Web page.
- **Related Web Surveys, Related Events, and Related URLs.** These lists allow you to specify Web surveys, related events, and related URLs that you can embed in your Web offer, using the Edit Web Offer personalization elements controls. For information, see [“Associating Web Offers, Web Surveys, Events, and URLs With Offers” on page 272](#).

- **Downloads.** This list allows you to provide a list of literature related to the offer that is available for download by the Web site visitor.

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

- [Associating a Template With a Web Offer](#)
- [Adding Attachments to Web Offers - Downloads List](#)

Associating a Template With a Web Offer

This section describes how to associate a template with a Web offer. To edit the offer template, see [“Creating and Editing Offer Templates” on page 248](#). Templates must first be added to the Offer Templates list to be available for selection in the Edit Web Offer view tab. For details, see [“Creating and Editing Offer Templates” on page 248](#).

To associate an offer template with an email offer

- 1 From the application-level menu, choose View > Site Map > Offers > Web Offers.
- 2 In the Web Offers list, select the offer and click the Edit Web Offer view tab.
- 3 Click the Template Name select button.
- 4 In the Pick Offer Template dialog box, select the template and click OK.

To be available for selection, templates must first be added to the Offer Templates list. For details, see [“Creating an Offer Template and Adding it to the Template List” on page 249](#).

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

Adding Attachments to Web Offers - Downloads List

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

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

The fields in this view are shown in [Table 54](#).

Table 54. Fields in the Web Offer Downloads View

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

Files added here are not automatically available for downloading. In this view, you select a set of files that you want to be able to include as downloads from your Web offer. These files then appear in the Personalization Elements list of embeddable objects in the Edit Web Offer form when you select the Downloads category from the Personalization Categories list.

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

When the Siebel Marketing software encodes this tag, it uses the Literature Item Name as the hyperlink text. The marketer can override this default behavior by using the wildcard (*) functionality and manually defining the HREF link, as described in [“Using Hyperlinks \(HREF\) in an Offer Template” on page 250](#).

To attach literature in the Downloads view

- 1** From the application-level menu, choose View > Site Map > Offers > Web Offers.
- 2** In the Web Offers list, select the offer and click the Downloads view tab.
- 3** In the Downloads list, select the literature you want to make available for downloading from the Web offer.
 - a** Click the menu button and create a new record.
 - b** In the Downloads form, click the Name select button.
 - c** In the Pick Literature Item list, select the item and click OK.

Setting Up and Using eMarketing **11**

Siebel eMarketing is an optional Siebel Marketing module that provides you with the tools and templates to manage and execute Web-based marketing. It provides the Web site visitor a method of viewing a Web offer, downloading literature, and using preconfigured Web response forms to request more information or ask you to contact them by telephone.

You can modify the look and feel of eMarketing to match your existing Web site. Additionally, you can use Siebel Personalization and Real-Time Marketing to personalize the offers and content being delivered.

Siebel eMarketing Web sites can be deployed in more than one language. For information about deploying Siebel applications in a multilingual environment, see *Global Deployment Guide*.

This chapter contains the following topics:

- [About eMarketing Web Site Visitors on page 290](#)
- [Setting Up Siebel eMarketing on page 293](#)
- [About the Siebel eMarketing Web Site on page 300](#)
- [Using the eMarketing Offers Page on page 301](#)
- [Using the eMarketing Information Page on page 305](#)

About eMarketing Web Site Visitors

A Web site visitor can navigate to the eMarketing home page by typing the URL or by clicking a hyperlink on another Web page. At this point, the user is an anonymous visitor and can choose to register, log in (if they have an existing user name and password), or continue to navigate anonymously. When the anonymous visitor arrives at the eMarketing home page, the default campaign offers and the details for the first offer in the Featured Offers list appear. If the visitor registers or logs in the visitor sees other campaign offers for which they are eligible. For more information about default offers, see the description of featured offers in [“Using the eMarketing Offers Page.”](#)

If a contact logs in using the contact’s user ID and password, any responses generated by this customer are tagged with the customer’s account ID and with the associated campaign ID. For information about setting up users, see [“Setting Up Default Responsibilities and Users for eMarketing”](#) on page 295.

Web site visitors can also navigate to the eMarketing site by clicking on an embedded URL from within an email or eNewsletter offer. Only contacts or prospects receive these offers. When an email contact or email prospect clicks an embedded URL, the Web Offer page for this offer appears. Any responses to the offer from this contact or prospect are tagged with the associated campaign ID and offer ID, allowing marketers to track response rates for specific campaigns. For a list of responses that are captured, see [“Response Management”](#) on page 298.

Visitors access the eMarketing home page in the following ways:

- **Anonymous visitor.** Any visitor can type the eMarketing URL into a Web browser and navigate to your eMarketing home page. This visitor sees no personalized Welcome message and responses are not captured when the visitor clicks a Recommended Product link or downloads literature. An anonymous visitor can create a product information or call response by clicking on the Send Product Information or Request a Call link in the Offers page or Information page. The profile information that the anonymous visitor types creates a prospect record that is associated with the responses.

- **Email contact.** When a contact clicks an embedded link in an email or eNewsletter, your eMarketing home page appears and the Contact Id is set in an anonymous session. At this point, the email contact is not logged in. The contact must be a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the contact to be a registered contact. The email contact can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the eMarketing home page, the contact can log in. After logging in, the email contact becomes a logged-in contact.

NOTE: If an email contact clicks the My Accounts link during an anonymous session, the User Login (user registration) view appears, requiring the anonymous visitor to log in before continuing.

- **Email prospect.** When a prospect clicks an embedded link in an email or eNewsletter, your eMarketing home page appears and the Prospect Id is set in an anonymous session. At this point, the email prospect is not logged in. The prospect must become a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the prospect to be a registered contact. The email prospect can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the eMarketing home page, the email prospect must register as a new contact before the prospect can log in. In the User Login applet, the email prospect can type a user ID and password or click the New User link to register as a new contact and obtain a user ID and password.

In the User Login view, the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing. When registration is complete, the prospect is converted to a new logged-in contact. However, the original email prospect's responses are not associated with the new contact record. After logging in, the email prospect becomes a logged-in contact.

NOTE: If an email prospect clicks the My Accounts link during an anonymous session, the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing.

- **Logged-in contact.** This contact has access to the My Account link and can perform all other tasks that a registered contact is eligible to perform. The logged-in contact can generate responses by clicking a Recommended Product link, downloading literature, or by requesting product information or a telephone call. These responses are associated with the contact record in the database.

Setting Up Siebel eMarketing

This section describes how to set up Siebel eMarketing. It includes information about customizing the user interface, controlling user access, setting up responsibilities, and managing default campaigns and offers.

Before Siebel eMarketing can be used, certain setup tasks must be performed. These include:

- [Installing eMarketing](#)
- [Controlling User Access to the eMarketing Web Site on page 294](#)
- [Setting Up Default Responsibilities and Users for eMarketing on page 295](#)
- [Using Siebel Personalization with eMarketing on page 295](#)
- [Customizing the eMarketing User Interface on page 296](#)

Installing eMarketing

Before you install and use eMarketing, you must install the following:

- **Siebel Web Engine and related components.** To deploy information on the Web and customer applications, you must install the Siebel Web Engine and the components on which it depends. These include a Web server, Siebel Gateway Server, and Siebel Server. For information about installing Siebel components, see the Siebel Server installation guide for the operating system you are using.
- **Siebel Applications.** To perform administrative tasks such as server administration, creating Web offers, and managing marketing activities, you must install a Siebel employee application such as Siebel eSales and add the Siebel eMarketing license key. For information about installing your Siebel employee application, see the appropriate administration guide, for example, *Siebel eSales Administration Guide*.

Additionally, Siebel eMarketing is an add-on module to Siebel Marketing. Siebel eMarketing requires the eMarketing Object Manager component, which is part of the Marketing Component Group. For information about installing Siebel Marketing, see [Chapter 2, “Initializing Siebel Marketing”](#) and the Siebel Server installation guide for the operating system you are using.

Controlling User Access to the eMarketing Web Site

You might want to perform some of the following tasks to control user access in your Siebel eMarketing Web site:

- Using external authentication using LDAP (Lightweight Directory Access Protocol).

LDAP is an Internet protocol that email programs use to look up contact information from a server.

- Creating database users for LDAP to use in database access.
- Defining visibility for views and products.
- Assigning a proxy employee.
- Creating users through registration or user administration.
- Associating users with accounts.
- Allowing various levels of access such as Anonymous, Implicit login, and Explicit login.
- Customizing access to home and login pages. For more information, see information about the New User link in [“Using the eMarketing Offers Page” on page 301](#).
- Using single-sign on functionality.
- Allowing another system to log in.
- Adding fields to registration forms.

For more information on controlling user access, see *Security Guide for Siebel eBusiness Applications*.

Setting Up Default Responsibilities and Users for eMarketing

Responsibilities control which views the users can see. The views to which a user has access determines the links and page tabs that the user sees. For example, if a user has a responsibility that does not permit access to the Credit Cards view, no Credit Cards link appears in the My Settings view. If no views within a business object are visible, the page tab that maps to that business object will not be visible.

The responsibilities predefined for Siebel eMarketing include:

- **Web Anonymous User.** Grants view visibility to anonymous users such as anonymous visitors, email prospects, and email contacts. For more information about these user types, see [“About eMarketing Web Site Visitors” on page 290](#). This responsibility allows the user to access views that do not have the Requires_Explicit_Login flags set to TRUE in Siebel Tools. For more information, see *Siebel Tools Reference*.
- **Web Registered User.** End user of the application in a business-to-consumer model such as logged-in contact. For more information about these user types, see [“About eMarketing Web Site Visitors” on page 290](#). This user has registered and is recognized by the Siebel application either through their login, or because the user enters the site by clicking an embedded link in an email or eNewsletter offer.
- **Web Corporate User.** End user of the application in a business-to-business model. A Web corporate user is associated with an account and must be authorized by the Web Delegated Customer Administrator to access the site. A Siebel Administrator can add new Web corporate users.

For more information about setting up and managing responsibilities, see *Security Guide for Siebel eBusiness Applications*.

Using Siebel Personalization with eMarketing

Siebel Personalization allows you to deliver personalized content and offers to a customer profile, needs, interests, and history. Personalized content includes greeting users by name, presenting them with content targeted to their needs and interests, and showing them recommended products and offers based on their needs and history.

Using Siebel Personalization, you can define rules to show and hide content dynamically during a user's experience with Siebel eMarketing. Personalization deployment rules can depend on data such as user's profile information, date ranges, company information, products and services they already purchased or reviewed, and specific session information.

The home page in Siebel eMarketing includes the salutation applet in the upper left corner. It typically includes a personal greeting but it can be configured to deliver targeted content such as product promotions, announcements, birthday greetings, and offer updates. The home page also contains a list of recommended products and featured offers, both of which can be personalized based on user-specific information. Conditional expressions can be used to hide applets under certain conditions.

You manage personalization in the Personalization Administration screen in your Siebel Application. For information about administering personalization, see *Personalization Administration Guide*.

Personalizing eMarketing Using Siebel Real-Time Marketing

Siebel Real-Time Marketing can be used to adjust the offers displayed on the eMarketing Home Page (Featured Offers applet). For more information, see [Chapter 8, "Administering Siebel Real-Time Marketing."](#)

Customizing the eMarketing User Interface

The Siebel product provides a set of Web templates and cascading style sheets (CSS) to create the look and feel of a Siebel application. Customers can create their own look and feel by modifying corporate logos, colors, and fonts in the style sheets and Web templates. When modifying these elements, make sure you save a backup copy in case you want to restore the original files.

NOTE: These elements are not automatically upgraded during the upgrade process.

The Siebel Web architecture uses the Siebel Web Engine (SWE) to dynamically generate HTML pages. The SWE uses configuration information in the Siebel Repository (SRF) and HTML layout information in the Siebel Web Template (SWT) to merge data with the template when creating the HTML page.

To customize the eMarketing User Interface, perform the following tasks:

- [Using Web Templates on page 297](#)
- [Implementing eMarketing Without Frames on page 298](#)
- [Full-Text Search on page 298](#)
- [Response Management on page 298](#)

Using Web Templates

A Web template defines the layout and formatting elements of the user interface (UI), such as views, applets, and controls. These UI elements are associated with the templates by using Siebel Tools. The associated information is stored in the SRF file. For example, you may have a View object with three applets. You associate a View Template with the view, and map each applet to a placeholder in that template. The advantage of this approach is that the UI objects in the repository are not hard-coded in individual templates. As a result, a number of View objects can share the same template if they share the same layout. The same process and design applies to Applet objects.

The three primary templates types are Container, View and Applet. The final HTML pages created by the SWE places the applet in the view and the view in the container. Siebel eBusiness Applications provide numerous applet and view templates with the product. They can be viewed in Tools, but are edited in an external editor. For information about the physical user interface layer, see *Siebel Tools Reference*.

The following is a list of some modifications that you might want to perform to change the look and feel of your Web site:

- Modifying Views and Applets
- Modifying Web Templates
- Changing colors
- Modifying behavior caused by clicking a button
- Adding or removing applets
- Changing controls

- Making fields in a form appear

For more information about customizing the user interface, see *Siebel Tools Reference*.

Implementing eMarketing Without Frames

Customer and partner applications use HTML frames for compatibility when running in browser-based applications. HTML frames allow portions of the browser window to scroll independently of the rest of the window. For example, you can place the navigation elements in one frame and content in another frame. You can scroll the content while the navigation elements remain in a fixed location.

Customer and partner applications can be implemented without using frames. Before choosing this method, consider the following limitation. In an unframed application, all UI elements exist in the same window. Therefore, the contents list may scroll off the page as a user scrolls down. For example, if the user scrolls down to review content, the navigation elements might not be visible.

Full-Text Search

Siebel Search for Customers is a subset of the Siebel Search product. It allows users to scan database tables and documents for pertinent information. Siebel Search is included with every license of a Siebel application. For information about Siebel Search and Siebel Search for Customers, see *Siebel Search Administration Guide*.

Response Management

Siebel eMarketing allows marketers to capture a series of responses during a customer interaction. Siebel eMarketing supports automatic capture of the following responses:

- Clicked on Web Offer. Captured when the recipient clicks the embedded link for a Web offer in an email or eNewsletter offer.
- Clicked on Product URL. Captured when the recipient clicks the embedded link for the product in an email, eNewsletter or Web offer.
- Clicked on Web Survey. Captured when the recipient clicks the embedded link for the Web survey in an email, eNewsletter or Web offer.

- Completed Web Survey. Captured when the recipient clicks Finish on the Web survey view. The survey answers are captured if the Save Answer field is checked for the question on the Smartsript Administration views. For more information, see *Siebel SmartScript Administration Guide*.
- Downloaded Info/File. Captured when the recipient clicks the embedded link for the document that is downloaded in a Web offer.
- Requested Unsubscribe. Captured when the recipient submits their subscription preference updates after clicking the embedded link in the email or eNewsletter offer. In addition to the response, the contact profile is automatically updated.
- Requested call back. Captured when the recipient submits their request after clicking the embedded link in an email or Web offer.
- Requested more info. Captured when the recipient submits their request after clicking the embedded link in an email or Web offer.
- Submitted Source Code. Captured when a contact or prospect types a source code and offer code in the Do you have Another Offer form in the Offers page.

Additional responses and Siebel events can be captured through configuration. For more information, see event tracking topics in *Siebel Tools Reference*.

About the Siebel eMarketing Web Site

The Siebel eMarketing Web site consists of the Offers page, the Information page, and their related views. Using the navigation bar, you can manage your personal profile by changing preferences in the My Settings view.

Web visitors access the My Settings view by clicking the My Account link in the navigation bar of any eMarketing page. The My Settings view has the following links that allow users and visitors to manage their personal profiles.

- **Address Book.** A list of available addresses for the visitor. A visitor can add, delete, and modify their address and the changes automatically update their information in the Siebel database.
- **Credit Cards.** A list of available credit cards for the visitor. This view is not required if you do not implement the Siebel eSales module or if you do not want to use credit card management.
- **Subscription Preferences.** A series of channel-specific and general communication preferences for each visitor. This view could be modified through Siebel Tools to include additional subscription preferences, for example by product or area of interest. These preferences could then be used to drive marketing activities for that visitor. This view appears when a user clicks on the Request Unsubscribe embedded URL in an email or eNewsletter and a Response is automatically created when the visitor clicks Submit. The individuals preferences are also updated automatically in the Siebel database.
- **User Profile.** A series of user profile fields, which the user can modify. Once again, this view can be extended to display additional profile information.

NOTE: Notification Preferences, Lister Payment and Shipping Terms, and Auction Privilege are not used at this time.

Using the eMarketing Offers Page

The default home page for eMarketing is the Offers page. The center applet of this view contains the specific Web offer intended for each Web site visitor. The Offers page provides links to other views, including additional offers, product information, Web surveys, and account and contact profile information.

The Offers page has the following configurable applets:

- **Salutation.** The salutation text that appears depends on the personalization rules that are applied for the user that accesses the page. After logging in, registered email recipients or Web users see a greeting customized with their name. An anonymous Web visitor's greeting says "Welcome!". You can change the salutation greeting text in the Personalization Administration views.

NOTE: When eMarketing is deployed as part of the eCustomer application (a bundle of eSales, eService and eMarketing), the user can see the Offers page (eMarketing home page) and the eCustomer home page. Because the eCustomer home page has a salutation greeting, the salutation greeting is suppressed in the Offers page (eMarketing home page).

- **The New User Link.** You can set up the New User link that appears in the User Login applet to allow a Web site visitor to create a user ID and password for limited access to your eMarketing Web site. When a visitor clicks New User on the eMarketing home page, the registration views appear, allowing the visitor to complete their profile. The process is managed by a workflow business process that you can modify in Siebel Business Process Designer. For more information, see *Siebel Business Process Designer Administration Guide*.

NOTE: If a prospect registers, the prospect is automatically converted to a contact. After becoming a contact, responses captured for the prospect are not associated with the new contact record. For more information, see *Security Guide for Siebel eBusiness Applications*.

- **Web Offer.** The center applet of the Offers page displays Web offer details. The applet contains the contents of the Web offer presented to the visitor. The Offer that appears is determined in the following ways:

- The offer details are based on the Web-offer link that the visitor selects in an email.
- The offer details are based on how Siebel Personalization or Real-Time Marketing sort the offers in the Featured Offers applet. Details for the top offer in the Featured Offers applet are automatically presented in the center applet.

NOTE: This area will be empty if no featured offers exist.

- **Recommended Products.** This applet contains a list of recommended products, customized for each user based on that user's Web profile attributes. This list can be modified using the Personalization Administration views. Unidentified users will see a default listing.
- **Featured Offers.** This applet displays every Web offer for which the contact or prospect is eligible. When a visitor logs onto a Web site and clicks the Request More Information or Request Call Back link, the response is captured for the default campaign and offer.

An offer associated with the default campaign can be designated as the default offer. You specify the default campaign and default offer in the Application Administration screen in the System Preferences view. To assign a default campaign, complete the Default Campaign Source Code field. To assign the default offer, complete the Default Offer Code field.

Web-offer types include the following:

- **Web offers associated with the default campaign.** When you specify a default campaign, the offers associated with that campaign appear in the Featured Offers list. The default campaign does not need to be loaded with campaign contacts and prospects. However, the campaign and associated Web offers must have active dates and the Inbound Active flag must be checked.

- **Web offers associated with other active campaigns.** These have been loaded with contacts and prospects. The offers must have active dates and the Inbound Active flag must be checked. Only those contacts and prospects will see these Web offers in the Featured Offers applet.

For more information about setting the default campaign or default offer, see *Applications Administration Guide*.

NOTE: You can control what appears in the Featured Offers applet using Siebel Real-Time Marketing rules. For additional information, see [“Sorting and Filtering By Scores Using Decision Broker” on page 207](#).

- **Information.** This applet contains hyperlinks to the following applets in the Information page:
 - Downloads.
 - Send Product Information.
 - Request a Call.

For more information about these applets, see [“Using the eMarketing Information Page” on page 305](#).

- **Do you have another offer?** After the user types the offer code and source code in these required fields and then clicks OK, that Web offer appears and a response is automatically created.

Using eMarketing Views and Additional Unstructured Content

For information about eMarketing views and content that the visitor might use, see the following topics:

- [Using the eMarketing Product Detail View on page 304](#)
- [Using the eMarketing Web Survey View on page 304](#)
- [Adding Unstructured Content on page 304](#)

Using the eMarketing Product Detail View

When a visitor responds to an offer (email, Web, or eNewsletter) by clicking an embedded product URL, a page with product details appears for that offer. This view displays details and incentive pricing for the selected offer. The price list associated with the offer determines the price shown in this view. The person who created the offer is responsible for associating the products and the correct price list with the offer. This combination determines the products that can be embedded in the offers and the price that appears. For more information about price list administration, see *Pricing Administration Guide*.

Additionally, this view contains the Related Items applet, showing products that might be of interest to the Web visitor. Items in the Related Items list are based on previous purchases or literature requests.

In addition to viewing details, the Web visitor using Siebel eCustomer may purchase the product from this view by clicking Add Item. After adding the product, the selected item appears in the Last Item Added applet.

NOTE: Checkout functionality exists only if the customer has purchased Siebel eCustomer. If you are not using eCustomer, the Add Item button is unavailable.

Using the eMarketing Web Survey View

When the Web site visitor clicks an embedded URL for a Web survey in an email, eNewsletter, or Web offer, a survey wizard appears that navigates the user through a series of questions about the product. Survey results can be automatically stored and then analyzed and used for future marketing activities. Web surveys are administered using Siebel Smartscripts. For more information, see *Siebel SmartScript Administration Guide*.

Adding Unstructured Content

Siebel eMarketing has the ability to display general external and unstructured content in the eMarketing site using the Microsite Management module. For more information, see *Applications Administration Guide*.

Using the eMarketing Information Page

The Information page allows Web site visitors to download product information and request more information. The visitor can reach this page clicking the Information page tab. The Information page contains the following applets:

- **Downloads.** Clicking a hyperlink opens the literature using the default viewer for that type of literature. The visitor can sort this list or search for any specific literature item by name, description, type, or date.
- **Request More Information.** Allows visitors to request product information (Send Product Information) and request a telephone call (Request a Call) using response forms. For more information about this applet, see the following topics:
 - [Using the eMarketing Send Product Information View](#)
 - [Using the eMarketing Request a Call View on page 306](#)

Using the eMarketing Send Product Information View

The Send Product Information view displays a form that Web site visitors can complete to request that product information be sent to them.

This view can be accessed from the Offers and Information pages or as an embedded URL link in an email offer or a Web offer. The Available Products area lists products for which additional information is available. This is determined by Catalog visibility. For additional information, see *Product Administration Guide*.

When the Request More Info or Request Call Back views are accessed using an offer's embedded URL, the list of products is restricted to the products associated with the offer. The user can browse the list, selecting products of interest, and then move the items to the Selected Products list by clicking Add.

A visitor can request information about the one or more items in the Selected Products list by selecting the check boxes. To clear an item from the list, choose a Selected Product item, and then click Remove. After the Web site visitor chooses the products for which he or she wants more information, the visitor clicks Continue to move to the delivery form. In the delivery form, the Web site visitor can choose direct mail, email, fax, or phone as the delivery method, and then fill in the necessary information for the delivery method. When the visitor clicks Submit, the Confirmation view appears listing the products for which the visitor requested information and the delivery information. This information is stored as a response of the type Requested More Info.

Using the eMarketing Request a Call View

The Request a Call view allows the Web site visitor to request a callback about one or more products. This view can be accessed from the Offers or Information pages or as an embedded URL in an email offer or a Web offer. When accessed from an email or Web offer, the products available are limited to those products associated with the offer. When accessed from the Offers or Information pages, the products are limited by Catalog visibility.

Requests for a telephone call are initiated in the same way as requests for product information, using Available and Selected product lists. After the visitor chooses the products that he or she wants to discuss in a callback, the visitor clicks Continue to move to the Request Call form. There the visitor provides a phone number, the time of day to call, and adds comments. When the visitor clicks Submit, a Confirmation appears containing a list of products for which the visitor requested a callback and a list of call preferences. This information is stored as a response of the type Requested Call Back.

Campaign Plans and Campaigns **12**

The Siebel Campaigns module is available to users with a license for Siebel Marketing or Siebel Campaigns. This module can be included as part of any base application, including Siebel Sales, Siebel Call Center, and Siebel PRM.

A campaign plan is a planning template that includes many of the details typically associated with a campaign, such as offers, lists, and team members. Typically, campaign plans are used by marketing professionals and are specific to the Siebel Marketing application.

A campaign is the vehicle or project in which you convey a marketing message to one or more groups of people. Typically, campaigns deliver a promotional offer to retain current customers or to acquire new customers across channels of communication. For example, you might launch a phone campaign that invites contacts to sign up for a special promotion, such as a visit to a resort, or deliver a direct mail campaign that provides a sample of a new product and a coupon offer to existing customers. You might also set up a recurring loyalty campaign that sends a monthly eNewsletter to your customers containing special deals on your products or services.

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

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

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

For more information about using campaign plans and campaigns in a specific product, see [“About Campaign Plans and Campaigns in Siebel Marketing”](#) on page 309 and [“About Campaigns in Siebel Campaigns”](#) on page 310, and Chapter 11, [“Setting Up and Using eMarketing”](#).

About Campaign Plans and Campaigns in Siebel Marketing

When a campaign plan is launched in the Siebel Marketing application, a campaign based on that campaign plan is created. If the campaign plan is launched multiple times, multiple campaigns are created and linked to the same campaign plan. Also, when the campaign is created from the plan, many of the associated entities such as offers, team members and organizations are automatically associated with the new campaign. Therefore, a campaign plan is a campaign template that can be applied any number of times within a program.

Campaigns are used by a more broad audience because they contain the information to manage active, day-to-day campaigns. For example, campaigns are accessible to users in other applications including Call Center, Field Sales, and the Partner Portal. Often, the users of these applications, only have visibility into the specific campaigns and offers to which they have been assigned, and do not interact with the program plans and campaign plans that were designed by the Marketers and originally launched each campaign. For more information, see [“About Campaigns in Siebel Campaigns” on page 310](#).

In the Marketing application, the campaign creation process begins when you create a campaign plan. After you create the campaign plan, you can associate it with a program plan and add more detailed planning information. The administrator and other team members can associate any required information with the campaign plan, such as offers, call scripts, literature, lists, or related documents. The campaign plan team can also make sure that the correct team members, organizations, and partners are associated with the plan.

When the program plan starts and a campaign plan loads, a campaign is created using the associated information (offers, team members, partners, organizations, and so on) set up in the campaign plan. This campaign can be reviewed by other users that will participate in the campaign launch such as sales or call center managers.

About Campaigns in Siebel Campaigns

Campaigns in the Siebel Campaigns module represent the day-to-day activities of a campaign. They are the same as the campaigns that result from a campaign plan in the marketing application. Campaigns contain contacts and prospects, offers, activities and other campaign execution elements.

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

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

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

Setting Up Campaign Plans in Siebel Marketing

In Siebel Marketing, to launch a campaign, you must create a campaign plan and associate it with a program plan. A campaign plan is a template that contains details such as offers, team members, organizations, and documents. When you add organizations to a campaign plan, those organizations are copied to the campaign when it is created. If a lead partner is associated with the campaign plan, that lead partner will also be copied to the campaign. Team members associated with campaign plans are also automatically copied to the campaign when it is created.

When you launch a campaign plan, most of the planning elements are automatically copied to (inherited by) the campaign, including offers, waves, and forecast inputs.

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

Campaign plans are available only in Siebel Marketing. To set up a campaign plan in Siebel Marketing, you need to perform the following tasks:

- [Creating a Campaign Plan](#)
- [Associating Offers With a Campaign Plan on page 315](#)
- [Assigning a Team to a Campaign Plan on page 316](#)
- [Setting Up Execution Options for a Campaign Plan on page 317](#)

Creating a Campaign Plan

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

To create a campaign plan

- 1 From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2 In the My Campaign Plans list, create a new record.
- 3 Complete the necessary fields for the campaign plan record, using [Table 55](#) as a guide.

Table 55. Fields for Campaign Plans

Field	Comments
Execution Period	Click the Period select button. In the Pick Period dialog box, choose the predefined time period during which the campaign will be active.
Lead Partner	<p>Choose a partner organization to associate with the selected record. If a lead partner was assigned at the program plan level and the campaign plan associated with that program plan does not have a lead partner, the campaign plan inherits the lead partner from the program plan.</p> <p>You can change the value, selecting from any of the partners associated with a campaign plan or campaign. This lead partner will be copied to any campaigns created from this campaign plan and to response or opportunities that result from this campaign.</p>
Name	<p>Type a name for the campaign.</p> <p>The uniqueness of a campaign is based on its source code. You can have two campaigns with the same name but the source codes for each campaign must be unique.</p>
Objective	Type a description of the campaign's objective.
Organization	<p>Click the Organization select button and select the predefined organization that is responsible for the campaign plan. You can choose more than one organization.</p> <p>You can also associate Partner Organizations with the campaign plan. Partner organizations are created and administered through Partner Administration. For more information, see <i>Siebel Partner Relationship Management Administration Guide</i>.</p>

Table 55. Fields for Campaign Plans

Field	Comments
Program Plan	This field is automatically completed when the campaign is associated with a specific marketing program.
Region	Choose from the list the region in which the campaign will be active.
Source Code	Automatically added. To change the value, type a source code for the campaign, or use the default record ID for the code. The source code for this campaign is available for use as part of the source code format for the program. The value must be unique.
Stage Plan	This field is automatically populated with stage information when the campaign is associated with a specific program plan's stage.
Start/End	For a campaign plan in Siebel Marketing and a campaign in Siebel Campaigns, the start and end dates default to the day and time you create the campaign. For campaigns in Siebel Marketing, the Start field is based on the date and time the campaign is loaded and the End field is inherited from the Campaign Plan. These dates do not affect launching campaigns. A campaign will launch even if the end date has passed.
Status	By default, campaign status is Planned (start and end dates in the future). Status values may be changed at any time. During automatic program execution, the status automatically changes to active when a campaign is loaded, and at the conclusion of the program, the campaign's status automatically changes to completed. If the program is executed manually, status does not automatically change. To change the status, use the status drop-down list to choose Active (start date in the past and end date in future) or Completed (start and end date in the past).
Type	Choose from the list the type of campaign you are creating. Options include Acquire, Retain, Win-Back, Cross-Sell, and Up-Sell.

Creating a Campaign Plan in the Program Explorer

To create a campaign plan in the Program Explorer, navigate to the Program Explorer. Expand the node of the program plan and stage in which you plan to use the campaign plan. In the Campaign Plans list, create a new record and complete the required fields.

Creating a Campaign Plan in the Program Flow

To create a campaign plan in the Program Flow, navigate to the Program Flow view tab. Select the program stage with which you want to associate the campaign plan. Drag the campaign plan icon from the palette into the workspace. In the dialog box, click New and complete the required fields.

Associating Other Entities With a Campaign Plan

[Table 56](#) contains descriptions of many entities that can be associated with a campaign plan.

Table 56. Entities That Can Be Associated With a Campaign Plan

Entity	Description
Activities	Team members can create and assign activities related to the Campaign Plan.
Activity Plans	Templates of activities can be associated with a Campaign Plan. For more information, see “Creating and Using Activity Plans” on page 427 .
Documents	Any team member can associate documents as attachments to the Campaign Plan.
Execution Options	The campaign plan execution options specify the default values for these settings each time the campaign plan is loaded.
Forecasts	Each Campaign Plan can have a Forecast that predicts the financial performance of the Plan. The actual results versus the Forecast can be tracked for each Campaign. For more information on developing Campaign Forecasts, see “Forecasting for Campaigns” on page 416 .
Lead Partner	Anytime a Campaign Plan is loaded, the Lead Partner is automatically added to the associated Campaign.
Offers	Each time the Campaign Plan is loaded or launched the associated offers will be copied to the campaign.
Organizations	These are the organizations that will have visibility to the Campaign Plan under All Campaign Plans. When the Campaign Plan is loaded, each organization is automatically included on the associated Campaign.

Table 56. Entities That Can Be Associated With a Campaign Plan

Entity	Description
Team Members	These are the employee positions that have visibility to the Campaign Plan under the My Campaign Plans option. When the Campaign Plan is loaded, each team member is automatically included on the associated Campaign.
Waves and Distribution Lists	For more information, see Chapter 18, “Specifying Waves and Vendor-Specific Lists.”

Associating Offers With a Campaign Plan

Before you implement a marketing program, you should associate one or more offers with the campaign plan, depending on your marketing strategy. Offers associated with the campaign plan can be viewed by choosing a campaign plan in the list, and clicking the Offers view tab. In this view the form displays details of the selected campaign. The Offers list provides information about each offer, including the name and description, the offer type, the source code assigned to this particular offer, and any associated product and price list.

When the campaign plan is loaded, a campaign record is created, and valid offers are copied to the campaign. Any views showing the offers for each Campaign have built-in visibility to prevent invalid offers from appearing to end users. A valid offer is defined as an offer with a current date that falls between its defined activation and expiration dates. If activation and expiration dates are not defined for the offer, the offer is valid by default. To edit the details of the offer, drill down on the offer Name hyperlink.

To associate offers with a campaign plan

- 1** From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2** In the Campaign Plans list, select a campaign plan.
- 3** Click the Offers view tab.
- 4** In the Offers list, create a new record.

- 5 In the Add Offer dialog box, select a predefined offer and click OK.

NOTE: Campaign Plan offers are copied to the Campaign each time the Campaign is loaded and when it is launched.

Assigning a Team to a Campaign Plan

Campaign Plan teams are set up by assigning individual employees to a team that is associated with the campaign plan. Each employee position on the campaign team has access to the campaign plan in the Campaigns screen's My Campaign Plans list.

If you are working with partners in developing the Campaign Plan, you can also include a partner as a team member by adding that partner's position. The partner might then view the campaign plan within the Partner Portal under Site Map > Campaign Planning > My Campaign Plans.

To assign a team to a campaign plan

- 1 From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.

- 2 In the Campaign Plans list, select the campaign and click the Team view tab.

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

- 3 In the Team list, create a new record.

- 4 Select employees from the Add Employees list and click OK.

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

- 5 Click the Primary field to select the primary team member.

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

NOTE: When you load the campaign plan, the team members from the plan are automatically copied to the associated campaign.

Setting Up Execution Options for a Campaign Plan

You can select the default options for each campaign when you set up the campaign plan. The default execution options control the assignment of campaign contacts and editing privileges for the campaign contact list. You can specify the default settings for assigning campaign contacts and editing privileges in the contact list. When you load the campaign plan, these settings will default on the associated campaign.

For more information about execution options, see [“Setting Up Campaign Execution Options” on page 339](#).

To set execution options for the campaign plan

- 1 From the application menu, choose Site Map > Campaigns > My Campaign Plans.
- 2 In the Campaign Plans list, select a campaign plan.

- 3 Click the Execution Options view tab and complete the fields using the information in [Table 57](#) as a guide.

NOTE: After the campaign plan is loaded, you can modify the execution options for the associated campaign at any time.

Table 57. Execution Option Fields

Field	Action
Assignment Rule Group	Required if you select Yes - Assignment Manager in the Campaign Contact Ownership field. Use if you want Assignment Manager to assign the organization owner and position owner to contacts in the campaign. Select a rule group to apply to contacts in the campaign.
Campaign Contact Ownership	Default is No. Values are: <ul style="list-style-type: none">■ No. You do not want to assign ownership. When you select this option, the Organization Owner and Position Owner fields are locked on the campaign contacts and prospect records.■ Yes - Manually. When you select this option, you can manually assign organization and position owners on the campaign contacts and prospect records.■ Yes - Assignment Manager. You want Assignment Manager to assign ownership based on Assignment Manager rule groups. If none of the rules apply, the default organization and position owners set in Siebel Tools will be applied. That is why it is very important that you create rules to cover all of your contacts and prospects. For additional information, see the description for Default Organization Owner in this table. When you select this option, the Organization Owner and Position Owner fields are locked on the campaign contacts and prospect records.

Table 57. Execution Option Fields

Field	Action
Default Organization Owner	<p>Optional. Shows only organizations associated with the campaign plan or campaign. When the campaign is loaded and the Campaign Contact Ownership value is Yes, Manually, these default values are automatically populated into the Default Organization Owner and Default Position Owner fields.</p> <p>When the campaign is loaded and the Campaign Contact Ownership value is Yes, Assignment Manager, the default values set in Siebel Tools are used by Assignment Manager. For more information, see <i>Siebel Assignment Manager Administration Guide</i>.</p>
Default Position Owner	<p>Optional. Shows only positions related to the selected Organization Owner. If you use Assignment Manager to assign ownership, you should complete this field so that a default value will be available for Assignment manager to use.</p>
Enable Contact Editing	<p>Default is on (True). Clear the check box if you want to prevent any one from changing the owner fields and adding and deleting contacts. This flag controls the ability to edit the following fields on the campaign contact or prospect record:</p> <ul style="list-style-type: none"> ■ Done Flag ■ Contact Last Name ■ Prospect Last Name ■ Organization Owner ■ Position Owner <p>In addition, when this value is True, the New and Delete buttons are available.</p>
Enable Partner Editing of Contacts	<p>Default is on (True). Clear the check box if you want to prevent partners from editing the fields and using the buttons controlled by the Enable Contact Editing check box.</p>

Preparing a Campaign

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

- **Import or create lists.** Import lists or create lists of campaign contacts, prospects, or existing customers you need for the campaign. For details, see [Selecting Imported or Internal Lists on page 331](#).
- **Select the contacts and prospects.** Add the names of contacts and prospects you will be targeting with the campaign. For details, see [Adding Contacts and Prospects to a Campaign Individually on page 332](#).
- **Determine campaign activities and milestones.** Create activity plans with associated activities for your campaigns. For details, see the chapter about activities in *Applications Administration Guide*.
- **Set up campaign groups and teams.** Specify group or team members to launch the campaign. For details, see [Working With Campaign Teams and Groups on page 336](#).
- **Establish employee skills.** Determine what employee skills are needed to launch the campaign. [Setting Up Campaign Assignment Skills on page 348](#).
- **Develop quotas.** Set up quota plans for campaign team members to meet and determine incentives or rewards for those who meet their quotas. For details, see [Setting Up Campaign Quotas on page 342](#).
- **Define the Segments.** For more information, see [Chapter 9, “Defining Filter and Segment Criteria.”](#)
- **Set up campaign execution options.** For more information, see [Setting Up Campaign Execution Options on page 339](#).
- **Define the offers.** Create the offer that your customers will receive, and associate the offers with campaigns. For details, see [Chapter 10, “Creating and Using Offers.”](#)
- **Create a SmartScript.** This SmartScript will guide agents through a campaign call. For details, see [Using SmartScripts on page 327](#).

- **Prepare literature items.** Prepare any literature items associated with the campaign. For details, see the chapter about literature in *Applications Administration Guide*.

Setting Up a Campaign

You can set up campaigns by performing the following tasks:

- [Creating a Campaign](#). Used in Siebel Marketing and Siebel Campaigns.
- [Associating an Offer with a Campaign on page 328](#). Used in Siebel Marketing and Siebel Campaigns.
- [Setting Up a Subcampaign in Siebel Campaigns on page 328](#). Used only in Siebel Campaigns.

Creating a Campaign

Use this procedure to create a campaign.

To create a new campaign

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, add a new record.

3 In the Campaigns form, complete the fields.

Some fields are described in [Table 58](#). To view all fields, in the Campaigns form, click the Show more button.

Table 58. Selected Campaign Fields

Field	Comment
Adjusted Cost	Click in the field and use the calculator controls to type an adjusted cost, if the total calculated cost is shared with other organizations.
DBM	This read-only field displays a check mark for TRUE if the campaign was created in Siebel Marketing. This field is not selected if the campaign was created using Siebel Campaigns.
Division	Select the internal division responsible for the campaign.
DNIS	Type the telephone number associated with the campaign. This number must be set up separately in Siebel CTI (Computer Telephony Integration). The DNIS field for a campaign is used in CTI to query for this campaign and drive a screen pop to this campaign. See <i>Siebel Communications Server Administration Guide</i> for more information. Type only numerals in this field. Do not use hyphens, spaces, parentheses, periods, or any characters other than numbers.
End	The default is the current date and time. Click in the field and use the calendar controls to select the campaign's end date. The start and end dates drive which campaigns are visible to the agents in the My Campaigns View. Start date must be less than or equal to today and end date must be greater than or equal to today.
Language	From the drop-down list, select the language in which the call script was created and click in the field you wish to complete next. If no language is specified, the selected SmartScript runs in the default language for the application. If the script does not have a translation for the language selected, you will get an error when trying to run the script.

Table 58. Selected Campaign Fields

Field	Comment
Lead Partner	Select from the partner organizations associated with the campaign. The lead partner will automatically be copied to the responses and opportunities associated with this Campaign. This field allows you to track partner participation in marketing efforts.
Lock Assignment	Select the Lock Assignment check box if the campaign team cannot be changed by the Territory Assignment Manager.
Name	(Required) Type a campaign name.
Objective	Type a description of the campaign objective—for example, “To increase sales by 10%.”
Organization	You can associate internal and external (partner) organizations. When you add a campaign to a program, it inherits the organizations associated with the program.
Parent Campaign	If the campaign is a subcampaign, identify the parent campaign.
Period	Select the predefined period that the campaign will be active. The Start and End Dates reflect the period selected.
Purpose	Type the purpose of a campaign—for example, “To cross sell products to existing customers.”
Region	Select the region of the country that the campaign targets. Options in the standard product are North, South, East, or West.

Table 58. Selected Campaign Fields

Field	Comment
Response Type	<p>(Required) Select either Opportunity or Response from the drop-down list. The default value for this field is Opportunity. The value in this field affects which fields are enabled during a customer interaction.</p> <ul style="list-style-type: none"> ■ Select Opportunity if your campaign targets contacts or prospects who have already expressed interest in your offerings. This choice allows you to use the Create Opportunity menu option to promote the response to an opportunity based on the customer’s interest. Only one opportunity may be created for a campaign contact or prospect. <p>If you have defined the response type of your campaign as Opportunity, and if the person who responded is a prospect, the prospect will be promoted to a contact when you select the prospect in the campaign Overview list and click Create Opportunity.</p> <ul style="list-style-type: none"> ■ Select Response if your campaign targets prospects that have not been qualified. This choice enables the Create Response and View Response buttons. Once a response is created, it can be promoted to an opportunity from the Response view. Because an agent may contact a prospect multiple times, this activity can generate multiple responses for a Campaign Contact or Prospect.
Route Contacts	<p>Select this check box if you want to dispatch campaign contact records to mobile users defined as members of the campaign team or group.</p> <p>By default, routing rules for campaign contacts are not included in the application. If your company wishes to route campaign contacts to mobile users, please contact Siebel Professional Services.</p>
Route Prospects	<p>Select this check box if you want to dispatch campaign prospect records to mobile users defined as members of the campaign team or group.</p>

Table 58. Selected Campaign Fields

Field	Comment
SmartScript	<p>Select a call script, if needed, to guide the agent’s interaction with the customer. To appear in the list, scripts must be set up in advance using Siebel SmartScript. For instructions, see <i>Siebel SmartScript Administration Guide</i>.</p> <p>The call script starts when an agent clicks the Script button in the Campaign Contacts or Prospects view.</p> <p>You can use the Call Guide as an alternative to a SmartScript call script.</p> <p>If more than one script is associated with a campaign, the script flagged as <i>primary</i> runs when the agent clicks the Script button.</p>
Source Code	<p>This unique campaign identifier based on the RowID is automatically filled in. The source code can be changed to a more meaningful value as long as the value is unique.</p>
Start/End	<p>The default is the current date and time. Click in the field and use the calendar controls to select the campaign’s start date.</p> <p>The start and end dates drive which campaigns are visible to the agents in the Campaigns > My Campaigns View.</p> <p>To appear in the Campaigns screen, The start date must be less than or equal to today and the end date must be greater than or equal to today.</p>
Status	<p>Options for status in the standard product are Planned (start and end dates in the future), Active (start date in the past and end date in the future), and Completed (start and end date in the past). The status must be set by the user and does not automatically change when the campaign is launched.</p>
Summary	<p>Type a summary of the campaign.</p>
Target Calls Per Day	<p>Type the number of calls you expect to be made per day.</p> <p>Using Siebel Tools, you can configure Campaign charts to compare these target values with the actual call activity recorded during the campaign.</p>
Territory	<p>You can select more than one territory. If more than one territory is selected, designate one territory as the primary.</p> <p>A value in this field can be used by Siebel Assignment Manager.</p>

Table 58. Selected Campaign Fields

Field	Comment
Total Cost	Click in the field and use the calculator controls to type the total cost of the campaign. This value should include the rollup of costs for subcampaigns.
Total Target Calls	Type the total number of calls that is the goal for the campaign. Using Siebel Tools, you can configure Campaign charts to compare this value with the actual call activity recorded during the campaign.
Type	Options for Type in the standard product are Acquire, Retain, Win-Back, Cross-Sell, or Up-Sell.

Using SmartScripts

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

If a SmartScript is associated with a business component and will be run for a campaign, then that business component's name must be the same as the value in the Response Type field for the campaign. For example, if the Response Type field is set to Response, then the script's business component must be Response. If the Response Type field is set to Opportunity, then the script's business component must be Opportunity.

To set up a SmartScript

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 Select a campaign.
- 3 In the SmartScript field, click the select button.
- 4 In the Smart Scripts dialog box, click New.

- 5 Select the script from the list of available scripts and click OK.

NOTE: Repeat [Step 3](#) through [Step 5](#) to add all the scripts that will be used in this campaign.

- 6 In the SmartScript dialog box, select the check box of the primary script and click OK.

Associating an Offer with a Campaign

Use this procedure to associate an offer with a campaign.

To associate an offer with a campaign

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 In the Campaign list, select a campaign.
- 3 Click the Offers view tab.
- 4 In the Offers list, create a new record.
- 5 In the Add Offer dialog box, select a predefined offer and click OK.

Setting Up a Subcampaign in Siebel Campaigns

Typically, you use subcampaigns only in Siebel Campaigns. You can create a hierarchy of Campaigns by using the Parent Campaign field on each Campaign. If you are planning a hierarchy of campaigns, you must design the campaign structure and then determine which offers will be presented by parent campaigns and which will be delivered by subcampaigns.

To set up subcampaigns

1 From the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.

2 In the Campaigns list, add a new record.

A new campaign record appears with default values in the campaign's Source Code, Start, End, and Response Type fields.

3 In the Campaign form, complete the fields, using the table in [“Creating a Campaign” on page 322](#) as a guide.

Working With Campaign Contacts and Prospects

In Siebel Marketing and Siebel Campaigns, lists are sets of contact information, usually purchased from third-party companies or imported from another application. You can include one or more lists of contacts and prospects for a campaign. In addition, you can add individuals using the Contacts/Prospects view tab.

In Siebel Marketing, when you load a campaign plan, the campaign contacts are loaded primarily based on allocated segment members. For details about segment allocation, see [Chapter 17, “Allocating Segment Counts to Campaigns.”](#) In addition to using segments, Siebel Marketing allows you to link lists directly to a campaign.

There are three types of lists used by Siebel Marketing and Siebel Campaigns:

- **External lists.** You can import purchased or rented lists into your Siebel system using List Management. When you use List Management with Siebel Data Quality you can scrub lists for duplicates during the import process. For details, see [“Importing and Managing External Lists” on page 469.](#)
- **Internal lists.** You can also use List Management to maintain lists created from records that already exist in your contacts or prospects databases. For details, see [“Creating and Managing Internal Lists” on page 485.](#)
- **D&B lists.** D&B lists are generated from D&B libraries of companies based on criteria you define. The D&B module provides a library of incorporated businesses that you can market to. Using the D&B screen you can create a list of D&B contacts to use in your campaign. For details, see the chapter about D&B in *Applications Administration Guide*.

You perform the following tasks when managing your contacts and prospects:

- [Selecting Imported or Internal Lists on page 331](#)
- [Associating Prospects or Contacts With a Campaign on page 331](#)
- [Adding Contacts and Prospects to a Campaign Individually on page 332](#)
- [Viewing Contacts and Prospects on page 334](#)

Selecting Imported or Internal Lists

When you associate a purchased list with a campaign, you import the list, and then associate the list with a campaign. Prospects will only be visible in the Campaign Contacts list if you successfully import the purchased list before associating it with a campaign. If contacts or prospects are added to a list after you associate that list with a campaign, you need to delete the list from the Campaign Lists view and associate it with the campaign again.

CAUTION: If you associate an empty list (a list prepared for import but not yet imported) with a campaign and then import the list, the prospects are not associated with the campaign and are not visible in the Campaign Prospects list.

Associating Prospects or Contacts With a Campaign

Use the following procedure to associate available imported or internal lists of contacts and prospects with your campaigns. You can also associate a list of prospects or contacts with campaign plans using the Program Flow or Program Explorer views. Before you associate a list with a campaign, make sure that the Siebel Server, the Object Manager component, and Workflow Process Manager component are running.

When you associate a list with a campaign, you will not immediately see data in the Contact/Prospect List. The list is populated after the Campaign List Association workflow process runs.

NOTE: Only active campaign lists can be associated with a campaign.

To associate a list of prospects or contacts with a campaign in Siebel Campaigns

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 In the Campaigns list, select the campaign and click the Lists view tab.

- 3 In the Lists list, add a new record.
- 4 In the Add Lists dialog box, select the list you want and click OK.

NOTE: When you associate a campaign list with a campaign, contacts in that list are associated with the campaign. If you change the campaign list to be inactive or if you delete it, the contacts still appear in the Contacts/Prospects applet for that campaign.

- 5 Click the Position select button, select a position, and click OK.

List position ownership should be coordinated with campaign contact ownership parameters set on the execution option views. Campaign contact position owner can be controlled by the list position owner or by assignment manager and execution options settings.

Reviewing the Status of the Server Component Request

After you associate a list of contacts or prospects, you can review the status of the request in the Server Component Requests screen. In the Component requests list, locate and review the Workflow Process Manager request status.

- When the Status value is Success, you can see the records in the Contacts/Prospects list.
- When the Status value is Error, you need to check the WfProcMgr.log file for errors.

Adding Contacts and Prospects to a Campaign Individually

In addition to using lists of contacts and prospects in a campaign, you can add individual contacts and prospects to a campaign. The ability to add or delete contacts and prospects can be controlled in the Execution Options view by using two flags (Enable Contact Editing and Enable Partner Editing of Contacts). If these flags are checked, the New and Delete buttons will be available. The buttons are available in Siebel Campaigns in the Campaign Administration views, but not the other Campaign views. For more information, see [“Setting Up Campaign Execution Options” on page 339](#).

After you add a list of contacts and prospects, all contacts and prospects in the list appear in the Campaign Contacts or Campaign Prospects view. From this view, you can also add contacts and prospects one at a time. For more information, see [Chapter 20, “List Management.”](#)

To add a contact or prospect to a campaign

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, select the campaign to which you want to add a contact or prospect.
- 3** Click the Contacts/Prospects view tab.

The list of available contacts or prospects appears, with information on the selected contact or prospect record displayed in the Contact or Prospect Details form.
- 4** In the Contacts or Prospects list, add a new record.
- 5** In the Contact Last Name or Prospect Last Name field, click the select button and in the Pick Dialog Box perform one of the following actions:
 - a** Select an existing record and click OK.
 - b** Click New to create a new contact or prospect, then type the information and click OK.

- 6 In the Contacts/Prospects Detail form, complete the remaining fields using [Table 59 on page 334](#) as a guideline.

NOTE: The Organization Owner and Position Owner fields are automatically populated with the information of the person creating the record.

Table 59. Contact and Prospect Detail Form Fields

Field	Comment
# Attempts	Type the number of contact attempts for this contact or prospect.
Call Status	Options in the standard product are: In Progress, Busy, No Answer, Left Message, Call Back Later, Call Completed, Not Completed.
Outcome	Describes the outcome of the call. Options in the standard product are: Created Opportunity, Created Response, No Interest, Unable to Reach Contact.

Viewing Contacts and Prospects

If you have access to the campaign, you can view the assigned contacts and prospects using one of the following procedures.

To view contacts and prospects in Siebel Marketing

- 1 From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2 In the Campaign Plans list, select a campaign plan.
- 3 Click the Status view tab.
Campaigns associated with the campaign plan appear.
- 4 Drill down on the campaign hyperlink.

The Contacts/Prospects list appears, showing only the assigned contacts and prospects for that campaign.

To view contacts and prospects in Siebel Campaigns

- 1** From the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, select a campaign.
- 3** Click the Contacts/Prospects view tab.

The list appears, showing the assigned contacts or prospects.

Working With Campaign Teams and Groups

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

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

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

- [Setting Up Campaign Teams](#). Used by Siebel Marketing and Siebel Campaigns.
- [Setting Up Campaign Groups on page 337](#). Used by Siebel Campaigns.
- [Associating Groups with Campaigns on page 338](#). Used by Siebel Campaigns.

Setting Up Campaign Teams

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

To set up a campaign team

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.

- 2 Select the campaign plan or campaign and click the Team view tab.

The creator selected record is automatically assigned as the primary member of the team. This position may be removed from the team as long as you specify a member of the team as the Primary.

- 3 In the Team list, create a new record.
- 4 Select employees from the Add Employees list, and click OK.
 - To select multiple consecutive employees, hold down SHIFT as you select names.
 - To select multiple nonconsecutive employees, hold down CTRL as you select names.
- 5 Click in the Primary field to designate the primary team member.

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

Setting Up Campaign Groups

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

To create a campaign group and add group members

- 1 From the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 Click the Groups view tab.
- 3 In the Campaign Groups list, add a new record.
- 4 Type a name and description for the group.
- 5 In the Campaign Groups list, select the group.
- 6 In the Positions list, add a new record.
- 7 In the Add Positions dialog box, select the positions for the group and click OK.

Associating Groups with Campaigns

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

To add a group to a campaign

- 1** From the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, select the campaign and click the Groups view tab.
- 3** In the Groups list, create a new record.
- 4** In the Add Groups dialog box, select the group and click Add.

Setting Up Campaign Execution Options

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

Campaign contact ownership is a feature that allows you to control team members visibility into the campaign contacts. Team members accessing the campaign contacts view will only be able to see those campaign contacts and prospects for which they own.

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

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

- [Setting Up Campaign Execution Options](#).
- [Using Assignment Manager with Campaign Contacts on page 340](#).

Setting Up Campaign Execution Options

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

To set up campaign execution options

- 1** From the application-level menu, choose View > Site Map > Campaigns.
- 2** In the Campaign Plans list, select a campaign plan.
- 3** Click the Execution Options view tab and complete the fields using the information in [Table 57 on page 318](#) as a guide.

Using Assignment Manager with Campaign Contacts

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

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

When this editing process is complete, you can run assignment manager against the campaign contacts and prospects to make sure ownership and visibility are correct. To run Assignment Manager, click the Run Assignment Manager button in the Execution Options view tab. You will be prompted to select a campaign, and then Assignment Manager will run against S_CAMP_CON for that campaign's contacts and prospects. For example, partners or employees might add new contacts to the campaign during the review process. Because these new leads might not have the correct owner, you can rerun Assignment Manager to assign these new records.

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

To automatically assign owners to campaign contacts

- 1** From the application-level menu, choose View > Site Map > Campaigns > All Campaign Plans.
- 2** In the Campaign Plans list, select a campaign plan.
- 3** Click the Execution Options view tab.
- 4** Verify that the values in the following fields are correct:
 - Default Organization Owner.
 - Default Position Owner.
 - Assignment Rule Group

5 Load and Launch the campaign.

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

6 If you wish to run Assignment Manager again, you can click the Run Assignment Manager button and select the campaign that you want to load and launch.

7 Click Run Assignment Manager.

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

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

Setting Up Campaign Quotas

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

To develop a quota plan with measurable objectives and rewards for success, use the following process and the quota view tabs to define details. For more information, see *Siebel Incentive Compensation Administration Guide*.

- 1** [Creating Campaign Quota Plans](#). Create the quota plan and specify the period it will be in effect.
- 2** [Defining Quotas for the Plan on page 343](#). Specify the objectives for each quota, and how performance is measured.
- 3** [To add quota objectives to the quota plan on page 343](#). Select quota objectives that reflect plans goals, and assign them to your plan.
- 4** [Assigning Awards to the Campaign Quota Objective on page 345](#). Define the incentives that participants receive for meeting quota objectives.
- 5** [Assigning Campaign Quota Plan Participants on page 347](#). Select team members eligible to participate in the quota plan.

Creating Campaign Quota Plans

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

To create a quota plan

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.

- 2 In the Campaigns list, select the campaign and click the Quotas view tab.
- 3 In the Quotas list, create a new record.
- 4 Complete the fields for the quota plan.

Some fields are described in [Table 60](#).

Table 60. Quota Plan Fields

Field	Comment
Active Flag	Automatically set to True upon quota creation.
Description	Description of the Quota Plan.
End	Automatically populated when the Period field is completed.
Internal Division Name	The name of the internal division associated with this quota.
Period	(Required) The time period for which the quota is active.
Plan Name	(Required) Type a relevant name for the Quota Plan.
Start	Automatically populated when the Period field is completed.

Defining Quotas for the Plan

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

To add quota objectives to the quota plan

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 In the Campaigns list, select the campaign and click the Quotas view tab.

- 3** In the Quotas list, locate the quota plan and drill down on the Name hyperlink.

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

- 4** In the Quotas list, create a new record.

- 5** In the Add Quota Objectives dialog box, select an objective and click OK.

Repeat [Step 4](#) and [Step 5](#) to add additional quota objectives to the quota plan.

To edit quota objective values

- 1** Use the step in the following list that applies to your product:

- In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
- In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.

- 2** In the Campaigns list, select the campaign and click the Quotas view tab.

- 3** In the Quotas list, locate the quota plan for which you want to edit objectives and drill down on the Name hyperlink.

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

- 4 Select the quota objective, and change values in the appropriate fields.

Some fields are described in the following table.

Field	Comment
Description	Type a detailed summary of the quota objective.
Performance Measure	Select the performance measure from the drop-down list. Options are Revenue and Units. Revenue typically corresponds to Amount and Units corresponds to Quantity.
Quota	(Required) Any name that makes sense for the quota.
Quota Type	Select the performance type from the drop-down list. Options are Amount and Quantity.

The modifications appear in the record when it is subsequently opened.

Assigning Awards to the Campaign Quota Objective

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

To assign predefined awards to a quota objective

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 In the Campaigns list, select the campaign and click the Quotas view tab.
- 3 In the Quotas list, locate the quota plan and drill down on the Name hyperlink.

The quota plan details are displayed in the form, and quota objectives appear in the Quotas list.
- 4 In the Quotas list, select a quota objective and tab to the Award field.

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

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

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

To create new awards

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 In the Campaigns list, select the campaign and click the Quotas view tab.
- 3 In the Quotas list, locate the quota plan and drill down on the Name hyperlink.

The quota plan details are displayed in the form, and quota objectives appear in the Quotas list.
- 4 Click the Awards view tab.
- 5 In the Awards list, create a new record.
- 6 Complete the necessary fields for the award.

Some fields are described in the following table.

Field	Comment
Name	Type a reference name for the award.
Award Date	In the field, click the arrow and use the calendar controls to specify the date the reward will be given.
Type	Select the award type from the drop-down list. Options are Dinner, Cash, Trip, and Other. Your administrator may change these values to reflect your company's requirements.

Field	Comment
Amount	In the field, click the arrow and use the calculator controls to type the dollar amount for the award. If the type is cash, then this is the amount of cash given with the award.
Description	Type a description of the award.

Assigning Campaign Quota Plan Participants

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

To add participants to the campaign quota plan

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 In the Campaigns list, select the campaign and click the Quotas view tab.
- 3 In the Quotas list, locate the quota plan and drill down on the Name hyperlink. Quota objectives appear in the Quotas list.
- 4 Click the Quota Plan Participants view tab.
- 5 In the Participants list, create a new record.
- 6 In the Add Positions dialog box, select the people targeted for quota plan participation and click OK.

Repeat this procedure to add other participants.

Setting Up Campaign Assignment Skills

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

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

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

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

- [Associating Assignment Skills with a Campaign](#)
- [Defining Campaign Skill Items on page 349](#)
- [Deleting Assignment Skills and Campaign Skill Items on page 351](#)

Associating Assignment Skills with a Campaign

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

To associate multiple assignment skills with a campaign

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2 In the Campaigns list, select the campaign and click the Assignment Skills view tab.

- 3** In the Assignment Skills list, create a new record.
- 4** Complete the necessary fields.

Some fields are described in the following table.

Field	Description
Comments	Type comments that describe the skill and how it will be used in the campaign.
Skill	Options in the standard product are: <ul style="list-style-type: none"> ■ Activity Category ■ Email Language Code ■ Email Recipient Profile ■ Industry ■ Language ■ Product ■ Product Line ■ Product Line Wildcard ■ Product Wildcard ■ Revenue

Defining Campaign Skill Items

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

To associate skill items with a skill

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.

- 2 In the Campaigns list, select the campaign and click the Assignment Skills view tab.
- 3 In the Assignment Skills list, select a skill.
- 4 Scroll down to the Campaign Skill Item list and create a new record.
- 5 In the Campaign Skill Item list, complete the fields defining the properties for each Skill item.

[Table 61](#) defines the skill items in the standard product that may be associated with a skill. Some items are associated with more than one skill.

Table 61. Skill Item Fields

Skill Item Field	Action
Activity Category	The activity category that must be performed for the campaign. For example, a campaign might need agents skilled in performing outbound calls to knowledgeable individuals or agents that can perform a demonstration.
Currency	The type of currency skill needed for the campaign.
Email Recipient Profile	The profile for the email recipient. If you have groups of agents with different types of email addresses, such as @support.com or @sales.com, Assignment Manager will assign based on a section of the email address of agents.
Expertise	The expertise required for this skill. Options in the standard product are Novice, Intermediate, and Expert.
Industry	The industry that the skill references.
Language Code	The language associated with the skill.
Product	The product associated with the skill
Product Line	The product line associated with the skill.

Table 61. Skill Item Fields

Skill Item Field	Action
Product Wildcard or Product Line Wildcard	Select Product Wildcard or Product Line Wildcard if you want Assignment Manager to evaluate the specified string value during a search of Product or Product Line names. For example, if you type Product Wildcard criteria with a value of Sales, a search will be performed for products containing that string of characters, such as Siebel Sales, Siebel eSales, and so on.
Revenue	Revenue can be used to assign agents to a campaign based on a revenue number. For example, only certain agents may be qualified to handle high value customers who generate revenue over \$1M. Click the Revenue select button and use the calculator to type the revenue figure and click the equal (=) sign.

Deleting Assignment Skills and Campaign Skill Items

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

To delete an assignment skill and all its campaign skill items

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, select the campaign and click the Assignment Skills view tab.
- 3** In the Assignment Skills list, select the skill and delete the record.

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

To delete a campaign skill item

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, select the campaign and click the Assignment Skills view tab.
- 3** In the Assignment Skills list, select the skill.
- 4** Scroll down to the Campaign Skill Item list and select the item you want to delete from the assignment skill.
- 5** Delete the record.

About Testing Campaigns and Offers

You can test outbound email, eNewsletter and fax campaigns in Siebel Marketing and Siebel Campaigns before actually sending them to target recipients. You can preview the offer delivery distribution using Test Email, and then launch the email campaign using the Send functionality.

Test Email sends a sample of the offer to a designated team member, based on his or her position. Because the test functionality references a position rather than a person, if the individual holding the position changes, the test offer automatically will be sent to the person actually holding the position.

To test campaigns and offers, perform the following tasks:

- [Prerequisite Tasks for Testing Offers](#)
- [Testing Campaign Offers Before Launching a Campaign on page 354](#)
- [Launching Email and Fax Campaigns on page 356](#)

Testing Campaigns Business Scenario

The marketing manager of a telecommunications company plans to roll out a campaign that targets mobile communications customers whose service agreements will expire in the next quarter. The campaign features an eNewsletter containing information on the latest wireless communications offers. The business goal is to retain the accounts of those customers by offering incentives for signing a new service agreement.

The marketing manager uses Test Email to view the content and format of the eNewsletter before it is sent to targeted customers.

Prerequisite Tasks for Testing Offers

Before you set up an email, eNewsletter or fax offer for testing, make sure the following tasks are completed.

- Siebel Marketing or Siebel Campaigns is running with the outbound communication server enabled.
- A valid communications delivery profile is assigned to the email or eNewsletter offer. Communication profiles are defined using the Communications Administration screen's Communications Drivers and Profiles view. For more information, see [“Using Delivery Profiles - Email, eNewsletter, and Fax” on page 277](#).
- The record for the team member contains a valid email address (for example, memberlogin@siebel.com).

Testing Campaign Offers Before Launching a Campaign

Test Email sends samples of every email or fax offer associated with a particular campaign to designated team members, based on positions. Before testing or sending email offers, make sure you complete the following tasks:

- **Make sure the offer is active.** The date in the Start field for the email offer must have arrived, and the date in the End field must be current or in the future for the Test Email and Send commands to be enabled.
- **Associate the offer with a campaign.** Associate the offer with an active campaign. For details, see [“Associating an Offer with a Campaign” on page 328](#).
- **Complete Web Server URL field.** Make sure the Web Server field in the Email Offer form contains the URL (path) to your Web server (for example, http://eCampaigns/Customer).

To test an email campaign

- 1 Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.

- In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, locate and select the campaign with the offer that you want to test.
- 3** In the Campaigns form, click the Team select button.
- 4** In the Team Members dialog box, select the appropriate members of the campaign team to include and click OK.

You can also add team members by creating a new record.
- 5** Click the Offers view tab.
- 6** In the Campaigns form, click the menu button and choose Test Email.
- 7** In the Campaign Team list, select the position to receive the offer, and click OK.

Email, eNewsletter, or fax offers associated with the campaign are automatically distributed to the team member occupying the position.
- 8** Verify that the employee on your team has received the email offer.

NOTE: URL links included in the offer are inoperative for tests because the links only work for Contact and Prospect IDs and not Positions.

Launching Email and Fax Campaigns

If you have tested your email or fax campaign, and the results are satisfactory, you are ready to send the email offers to campaign recipients. For more information, refer to [Chapter 21, “Launching Programs and Campaigns”](#) for additional information.

To send email and fax offers

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > All Campaigns Across Organizations.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** In the Campaigns list, select the campaign and click the Offers view tab.
- 3** In the Campaigns form, click the menu button and select Send.

Using Response Management

Siebel Marketing and Siebel Campaigns use Response Management. Whenever prospects or contacts respond to an offer through any channel (by inbound email, the Web, a call center, or sales representative), their responses may be captured in detail using the Responses screen. Using Response views, you can determine which contacts to pursue as opportunities.

Campaign media can be different from response media. Recipients of an Internet campaign can respond through a call center, and recipients of a direct mail offer may respond by going to a Web offer URL. A Web site or email can automatically capture response details, while phone calls or direct mail responses must be recorded manually.

There are several response types and each response type has several parameters that store details about a given response. You can modify an automatically captured response if you have permission. Responses are tracked for an offer and for a campaign.

NOTE: In Siebel Campaigns, inbound emails are not automatically captured as responses. You must configure Siebel eMail Response to support inbound email processing. For more information, see *Siebel eMail Response Administration Guide*.

Using the All Responses View

The All Responses list allows you to view responses to selected campaigns and offers and to add response information to existing prospect or contact records. You can use this view to promote a contact to an opportunity, specify the response type and channel, and score the response. An optional Details form allows you to type additional information about the response.

To add response information

- 1 From the application-level menu, choose View > Site Map > Responses > All Responses.
- 2 In the All Responses list, create a new record.

3 In the Responses form, complete the fields using the following table as a guide.

Fields	Comment
Campaign	Required. Click the Campaign select button. In the Pick Campaign dialog box, choose the campaign and then click OK.
Description	Required. Type a description that contains details of the response.
Last Name	<p>Click the Last Name select button for a prospect or contact. In the Pick Contact (or Prospect) dialog box, select the respondent's name and click OK.</p> <p>A number of fields are automatically populated based on this selection. These include:</p> <ul style="list-style-type: none">■ The respondent's first name.■ The account associated with the respondent. If no account is associated, use the Account select button to choose one.■ The account address (city, state, country, telephone number, and so on), that are associated with the respondent are automatically filled in the form.
Lead Partner	Choose a partner organization to associate with the response. If a lead partner was assigned at the program level or campaign level, it will automatically appear in this field. If you do choose to change the Lead Partner value, the drop-down list shows only those partners associated with the campaign source.
Method	<p>In the Method field, choose the method used to capture the response. This field is optional.</p> <p>Options are Mail, Other Lists, Web Demo, Direct mail, Other, Email, Fax, Phone, BRC (Business Reply Card), Web, Event Registration List, Event Attendee List, Purchased Lists, Partner List, and Sales Created List.</p>
Offer	<p>Required. Click the Offer select button. In the Pick Offer dialog box, choose the offer that prompted the response and click OK.</p> <p>Only those offers associated with the selected campaign will appear in the list.</p>
Response Type	Required. Choose the type of response from the list. Options include Clicked on Web Offer, Clicked on Product URL, Email Reply, Requested Call Back, and so on.

Fields	Comment
Score	Type a numeric value that represents a score for the response.
Source Code	In Siebel Marketing and Siebel Campaigns, source codes are assigned to each campaign contact according to the source code format associated with the program stage. If this information is included in offer materials, the code can be added by the user on the response.
Offer Code	Each offer has a unique offer code. If the offer code is included in the offer materials, the code can be added by the user on the response.
Status	Choose a status of Open, Pending or Closed.

Using Automatic Source Code and Offer Code Lookups

Behind each Responses view is an automatic business service that will look up and decode information based on any source codes or offer codes added in a response.

Source Code Lookups

To perform a source code lookup, type the campaign contact's source code into the Source Code field on the response form and leave the field. You do not have to save the record to perform the lookup. As soon as you click or step off the field, the lookup service will determine whether the campaign is recognized and whether the contact name can be uniquely determined. If the source code is recognized, the correct campaign name will be defaulted. If the contact name can be uniquely determined within a campaign, the contact name will also be defaulted. The source code value is stored in the Campaign Contact table (S_CAMP_CON) for each contact record.

Offer Code Lookups

To perform an offer code lookup, type the offer code in the response form. When you save the record, if the lookup service recognizes the offer code, it defaults the correct offer name.

NOTE: If the source code or the offer code is not recognized by the application or if the two codes conflict, both values will be saved with the response to preserve the user data.

If your deployment does not require source code lookups, you can disable the Response Lookup business service in Siebel Tools.

Using the All Responses–Products View Tab

This view tab displays a list of products associated with the response, for example, products for which a respondent requested information using a product link in an email or Web offer.

To add products

- 1** From the application-level menu, choose View > Site Map > Responses > All Responses.
- 2** In the Responses list, select the response record and click the Products view tab.
- 3** In the Products list, create a new record.
- 4** In the Products dialog box, select the product from the list and click Add.

The list contains products that have been associated with the offer.

Using the All Responses–Orders View Tab

This view tab displays a list of the respondent's product orders. An order record contains information on the order status, the order number, type, account associated with the order, the date, priority and description of the order.

To add orders

- 1 From the application-level menu, choose View > Site Map > Responses > All Responses.
- 2 In the Responses list, select the response record and click the Orders view tab.
- 3 In the Orders list, create a new record.
- 4 In the Orders dialog box, select the order from the list and click Add.

Using the All Responses–Opportunities View Tab

This view tab displays a list of opportunities associated with the response.

To add opportunities

- 1 From the application-level menu, choose View > Site Map > Responses > All Responses.
- 2 In the Responses list, select the response record and click the Opportunities view tab.
- 3 In the Opportunities list, create a new record.
- 4 In the Opportunities dialog box, select the opportunity from the list and click Add.

Using the All Responses–Attachments View Tab

This view tab displays a list of documents and other items that are associated with the response record.

To add attachments

- 1 From the application-level menu, choose View > Site Map > Responses > All Responses.
- 2 In the Responses list, select the response record and click the Attachments view tab.
- 3 In the Attachments list, create a new record.
- 4 In the Attachment Name field, click the select button.

- 5** In the Add Attachment dialog box, use one of the following steps:
 - a** To add a URL, in the URL field, type the URL.
 - b** To attach a file, click the Browse button, locate the file, and click Open.
- 6** Click Add.

All Responses—More Information View Tab and Response Details

The More Information form varies, depending on the response type selected, and contains the Response Details summary and memo form.

NOTE: A Response is not automatically created when you click a Related Events link in an email or Web offer. Siebel Marketing and Siebel Campaigns do not provide responses for Clicked on Related Event.

Promoting a Response to an Opportunity

If the customer is interested in the product offered by the campaign, you can promote the response to an opportunity. If the customer is an existing contact, the account is automatically associated with the opportunity. If the customer is a prospect, the customer is automatically promoted to a contact, and then associated with an account.

To promote a response to an opportunity

- 1** From the application-level menu, choose View > Site Map > Responses > All Responses.
- 2** In the Responses list, select the response to promote.
- 3** In the More Info form, click Create Opportunity.

The Opportunity form appears, with the response information in the form, and the contact information in the Campaign Leads Contacts list.

Creating Automatic Responses from Opportunities and Orders

Siebel Marketing and Siebel Campaigns include two automatic workflows for creating response records whenever an opportunity or order is associated with a campaign.

For opportunities, the response is created for each contact added to an opportunity after a campaign is associated as an opportunity source. To create the response, associate a campaign with the opportunity using the Source field MVG (multivalued group) and then add a contact to the opportunity. All responses default to a Type of Created Opportunity.

For orders, the response is created whenever a campaign is associated with a sales order. To create the response, you associate a campaign with the Sales Order using the Campaign field. All responses default to a Type of Respondent Purchased.

Using Campaign Explorer

You can use the Campaign Explorer view in Siebel Marketing and Siebel Campaigns to monitor subcampaigns, contacts, activities, and offers for each campaign. The left pane of this view contains an explorer and the right pane shows the details of the selected campaign.

You can use the detail list to add folder items. For example, to add an activity, you select the Activity folder in the left pane, and the Activities list appears on the right. Then, from the list, you add a new activity record.

To review campaign elements

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > Explorer.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > Campaign Explorer.
- 2** In the Campaign Explorer, expand the folders for each campaign to display subfolders of campaign elements.
- 3** Click a folder to display detail of the subcampaign, contacts, activities and offers in the list on the right.

To add items to folders

- 1** Use the step in the following list that applies to your product:
 - In Siebel Marketing, from the application-level menu, choose View > Site Map > Campaigns > Explorer.
 - In Siebel Campaigns, from the application-level menu, choose View > Site Map > Campaign Administration > Campaign Explorer.
- 2** In the Campaign Explorer, expand the campaign item to show its subfolders.
- 3** Click a subfolder.
- 4** In the details list, add a new record and complete the fields.

Viewing Campaign Charts in Siebel Campaigns

Campaign charts are used by Siebel Campaigns and allow you to review performance and graphically display results in a chart for areas such as incentive compensation, completed calls, lead quality by campaign, and so on. When you view a chart, the saved query in the upper-right corner filters the information shown in the chart.

Available charts include:

- Campaign Achievement
- Call Status Analysis
- Call Status Analysis by Employee
- Lead Quality Analysis by Campaign
- Lead Quality Analysis by Response
- Opportunity Revenue Analysis
- Opportunity Revenue Analysis by Employee
- Campaign Trend Analysis
- Campaign Trend Analysis by Employee
- Order Revenue Analysis

Viewing a Campaign Achievement Chart

The Campaign Achievement chart displays the results of the Sales Quota Plan set up for each campaign. The chart represents the percent achievement of quota for each campaign, and applies Incentive Compensation functionality to campaigns.

Perform the following tasks before viewing campaign achievement charts.

- 1** Create a quota plan, and associate quota plan objectives and participants with the plan.

Quotas are discussed in [“Creating Campaign Quota Plans” on page 342](#). For more information, see *Siebel Incentive Compensation Administration Guide*.

- 2** Type achievement values by performing these tasks:
 - a** From the application-level menu, choose View > Site Map > Sales Quotas > Sales Quotas.
 - b** In the Quota Achievement list, select the quota plan.
 - c** Type the amount you achieved compared to quota numbers.

Achievements may be added manually or by using a workflow process that automatically completes achievements based on actions in Siebel Call Center. For more information, see *Siebel Call Center User Guide*.

You can view the Campaign Achievement Chart from the Achievement Analysis view of the Sales Quota screen or the Charts view of the Campaigns screen.

To view Campaign Achievements in Siebel Marketing

- 1** From the application-level menu, choose View > Site Map > Sales Quotas > Sales Quotas.
- 2** In the Quota Achievement list, select the quota plan and click the Achievement Analysis view tab.
- 3** In the By drop-down list, select either Plan Name or Quota, then select the chart type from the drop-down list.
- 4** In the Achievement Analysis form, click Go to display the chart.

To view Campaign Achievements in Siebel Campaigns

- 1** From the application-level menu, choose View > Site Map > Campaigns > My Campaigns.
- 2** Click the Charts view tab.
- 3** In the Objectives vs. Achievement list, select the plan name.
- 4** In the Show drop-down list of the Charts list, select Campaign Achievements.
- 5** In the By drop-down list, select Campaign Name or Objective Name and select the chart type from the second drop-down list.
- 6** In the Objectives vs. Achievement form, click Go to display the chart.

Viewing a Call Status Analysis Chart

The Call Status Analysis chart displays the number of calls that have been completed compared to the number of calls that have not been completed for each campaign. This chart can be used by a call center manager to determine which campaigns are lagging and where to shift resources.

Perform the following tasks before creating the Call Status Analysis chart:

- 1 Assign any contacts and prospects you will be contacting to the campaign.

For details, see [“Adding Contacts and Prospects to a Campaign Individually” on page 332](#).

- 2 After each contact or prospect is called, update the status in the Call Status field in the Contacts or Prospects list or form.

The chart is based on information from this field—a Call Completed flag indicates that the call is completed—and the number of contacts and prospects targeted by the campaign.

Viewing a Call Status Analysis by Employee Chart

The Call Status Analysis by Employee chart displays completed and uncompleted calls by a specified employee for each campaign. The values for this chart may be derived from lists of contacts and prospects assigned to the position and the Calls Completed field for the contact or prospect record in the Contacts or Prospects view.

A campaign list can be associated with a position. When this occurs, the position becomes the owner of the Campaign Contacts or Campaign Prospects. If the OwnerID is assigned, then only the employees of that position can view the Campaign Contacts or Prospects for a particular campaign. If the list is not assigned, then the OwnerID is NULL and all employees assigned to the Campaign Team or Campaign Group can see the Contacts or Prospects view.

Perform the following tasks before generating the Call Status Analysis by Employee chart.

- 1** If the employee position will be evaluated based on lists of contacts and prospects, assign the lists to the position in the Campaign Lists view.

The position becomes the owner of the list's contacts and prospects.

When you associate a list with a campaign, if the Position field is not empty, then the OwnerID or each contact or prospect in that list is associated with that position.

Most companies do not assign the contacts or prospects to a position, so the OwnerID is NULL. In such cases, the chart shows only one employee: Unknown.

- 2** Update call status in the Campaign Contacts view.

The chart draws its values on which contacts have been called based on the Done flag in the Call Status field. Make sure this field reflects the current status of the call.

Viewing a Lead Quality Analysis by Campaign Chart

The Lead Quality Analysis by Campaign chart displays the opportunities that have been created for the campaign when the Response Type is set to Opportunity. Using this chart, you can display opportunities by number of opportunities, by total opportunity revenue, or by average opportunity broken out by lead quality.

Perform the following tasks before viewing the chart:

- 1** In the Campaigns list, make sure the Response Type is set to Opportunity.
- 2** In the Opportunities screen, for each opportunity created for a campaign, make sure values are typed in the Revenue, Lead Quality and Source fields.

You can use the My Opportunities or All Opportunities views to see the opportunities you need to check.

Viewing a Lead Quality Analysis by Response Chart

The Lead Quality by Response chart displays the opportunities that have been created for a campaign when the campaign's Response Type is set to Response. The chart displays opportunities by number of opportunities, by total opportunity revenue, or by average opportunity broken out by lead quality.

Perform the following tasks before generating the chart:

- 1 In the Campaigns list, make sure the Response Type is set to Opportunity.
- 2 In the Opportunities screen, make sure that the Revenue, Lead Quality, and Source fields are completed for each opportunity.

Viewing an Opportunity Revenue Analysis Chart

The Opportunity Revenue Analysis chart displays the campaign's Number of Opportunities and the Expected Revenue for those Opportunities. The left axis is Opportunity Revenue and the bar chart corresponds to Revenue. The right axis is the Number of Opportunities and the line chart corresponds to Revenue.

When using the chart, Opportunity Revenue Analysis by Campaign, only campaigns set to response type Response are used to create the chart.

This chart allows you to view the relationship between the amount of revenue and the number of opportunities for campaigns. For example, a campaign administrator might use the chart to identify campaigns that are generating a high volume of opportunities but have a low potential for revenue and campaigns which generate a smaller number of opportunities but have a higher potential revenue per opportunity.

Before generating the chart, navigate to the Opportunities screen and make sure that, for each opportunity associated with the campaign, the Revenue field contains a value.

Viewing an Opportunity Revenue Analysis by Employee Chart

The Opportunity Revenue Analysis by Employee chart shows the number of Opportunities and the potential revenue for opportunities for each employee. It displays information in the same way as the Opportunity Revenue Analysis chart, but targets employees in the analysis.

Perform the following tasks before generating the chart:

- 1** From the application-level menu, choose View > Site Map > Opportunities.
- 2** Select an opportunity associated with the campaign.
- 3** Make sure that the Revenue contains a value.
- 4** In the Sales Team field, type the User ID of the agent generating the opportunity.

Viewing an Order Revenue Analysis Chart

The Order Revenue Analysis Chart shows the total revenue for orders generated by campaign.

Perform the following tasks before generating the chart:

- 1** From the application level menu, choose View > Site Map > Campaigns > My Campaigns.
- 2** Select a Campaign with the Response Type set to Response. (This chart only shows data for campaigns with Response Type set to Response.)
- 3** Select the Contacts/Prospects view tab and click Create Response.
- 4** For this response, click the Orders tab and create a new record.
- 5** Click the Order number hyperlink to type details for the order.

Viewing a Campaign Trend Analysis Chart

The Campaign Trend Analysis chart displays the total number of responses for each campaign over a period of time. The period can be set to day, week, month, quarter, or year.

Before generating the chart, review responses for each campaign by navigating to the Campaigns view, selecting the campaign, and clicking the Responses view tab.

Viewing a Trend Analysis by Employee Chart

The Campaign Trend Analysis chart displays the total number of responses generated by each employee across campaigns over a period of time. The period can be specified by day, week, month, quarter, or year.

Perform the following tasks before generating the chart:

- 1** From the application-level menu, choose View > Site Map > Campaign Administration > All Campaigns Across Organizations.
- 2** Select the campaign and click the Responses view tab.
- 3** Review the list of responses, making a note of the description and user.
- 4** From the application-level menu, choose View > Site Map > Responses > All Responses.
- 5** For each response you found in [Step 3](#), make sure that the Created By field contains the User ID of the employee who handled the response and, therefore, owns it.

Viewing Response Charts in Siebel Campaigns

Siebel Marketing and Siebel Campaigns include response charts. Response charts allow you to analyze response to your campaigns in areas such as opportunities, revenue, campaign offers, and so on. When you view a chart, the saved query in the upper-right corner filters the information shown in the chart.

Available Response charts include:

- Campaign Analysis
- Opportunity Analysis
- Offer Analysis
- Offer Type Analysis
- Offer Type Analysis by Campaign
- Revenue Analysis
- Average Opportunity Revenue Analysis

To access Response charts

- 1** From the application-level menu, choose View > Site Map > Responses > All Responses > Charts.
- 2** In the Charts view use the Show drop-down list to select the type of data you want to display.
- 3** In the drop-down list below the Show field, select the type of chart and click Go.
To change the type of chart, select a different type and click Go.

Campaign Analysis (Response)

The Campaign Analysis chart displays the total number of responses for each campaign.

Perform the following tasks before generating the chart:

- 1 From the application-level menu, choose View > Site Map > Responses > All Responses (or My Responses).
- 2 Select the Response Record.
- 3 In the Campaign Name field, associate the response with a campaign.

Viewing an Opportunity Analysis (Response) Chart

The Opportunity Analysis chart displays the total number of opportunities created for each campaign, based on the Source field in the opportunity record.

Perform the following tasks before generating the chart:

- 1 From the application-level menu, choose View > Site Map > Responses > All Responses (or My Responses).
- 2 For each response to your campaign, verify that opportunities are created (if applicable).

To create an opportunity for the campaign

- 1 Select the response record in the Responses list.
- 2 In the More Info form, click Create Opportunity.

An opportunity is created for the campaign and the campaign name is typed in the Source field for the opportunity.

Viewing an Offer Analysis (Response) Chart

The Offer Analysis chart shows the total number of responses per offer based on the offer associated with the response.

Perform the following tasks before generating the chart:

- 1 From the application-level menu, choose View > Site Map > Responses > All Responses (or My Responses).
- 2 For each response to campaigns featuring the offer, make sure the correct offer is associated with the response by reviewing the response record's Offer field.

Viewing an Offer Type Analysis (Response) Chart

The Offer Type Analysis chart displays the total number of responses for each offer type across all campaigns.

Perform the following tasks before generating the chart:

- 1** Confirm that each offer associated with the campaign has an offer type and offer name specified. For information about finding or completing these fields, see [“Creating an Offer” on page 242](#).
- 2** Type responses during the campaign. The offer is identified for the response in the Offer Name field.
- 3** Generate the chart, using the procedure on [“Viewing Response Charts in Siebel Campaigns” on page 372](#).

Viewing an Offer Type Analysis (Response) by Campaign Chart

The Offer Type Analysis by Campaign chart displays the total number of responses per offer type for each campaign. Each campaign can have many offers.

Perform the following tasks before generating the chart:

- 1** Confirm that each offer associated with the campaign has an offer type and offer name specified. For information about finding or completing these fields, see [“Creating an Offer” on page 242](#).
- 2** Confirm that the offers you want in the chart have been added to the campaign. For information about this procedure, see [“Associating an Offer with a Campaign” on page 328](#).
- 3** Type responses during the campaign.
- 4** Generate the chart, using the procedure on [“Viewing Response Charts in Siebel Campaigns” on page 372](#).

Viewing a Revenue Analysis (Response) Chart

The Revenue Analysis (Response) chart displays the total revenue for each campaign and the total number of opportunities for each campaign. The bar chart shows the revenue by campaign and the line graph shows the number of opportunities for each campaign.

Values for this chart are derived from the Revenue and Source fields in the Opportunity screen's My Opportunities or All Opportunities list. The revenue number is derived from the sum of the Revenue fields in the Opportunity records, with the Source field set to the campaign name. Before generating this chart, make sure to complete these fields for opportunities used in this analysis.

Viewing an Average Opportunity Revenue Analysis (Response) Chart

The Average Opportunity Revenue Analysis chart displays the average revenue for each campaign. For each opportunity created for the campaign, the revenue is added and the average is taken across opportunities created for the campaign.

Values for this chart are derived from the Revenue and Source fields in the Opportunity screen's My Opportunities or All Opportunities list. The revenue number is derived from the average of the Revenue fields in the Opportunity records, with the Source field set to the campaign name. Before generating this chart, make sure to complete these fields for opportunities used in this analysis.

Designing Marketing Program Plans **13**

The program plan is the template for the program flow that is applied when you execute the program. In the Programs screen, you can use the Program Flow view to graphically map the program logic by adding elements such as stages, segments, lists, and campaign plans to the stage in the interactive workspace, or you can use the Program Wizard button on the Program Plans list to guide you through the process of adding program components and allocation. At its conclusion, the Program Wizard displays the Program Flow view with program components placed on the workspace.

As you add the task objects to the workspace, you can use the right-click menu to manually start Marketing Server tasks, such as generating a snapshot, loading a campaign and launching the campaign. If you want to schedule server tasks to be started automatically, you can use the Schedule calendar.

Each time you design and implement a marketing program, you perform a number of tasks in the sequence shown in the following list:

- 1 Creating a program plan.** Define the details of the program plan, such as the customer hierarchy and targeting level, the campaign load mapping for external data, the start and end date, and so on. For details, see [Creating a Program Plan on page 382](#).
- 2 Adding a stage to the program.** Using the Program Flow view, add a stage milestone to the program plan and complete stage details, such as assigning a filter or output file layout to the stage. For details, see [Using the Program Flow on page 387](#), and [Adding a Stage to the Program on page 388](#).
- 3 Assigning segments to a stage.** Using the Program Flow view, select predefined segments that define the target customer you are trying to reach, and associate the segments to the stage. For details, see [Assigning Segments to a Stage on page 392](#).

- 4 Adding a campaign plan to a stage.** Using the Program Flow view, select one or more predefined campaign plans with associated offers and link these campaign plans to the program stage. For details, read [Adding a Campaign Plan to a Stage on page 392](#).
- 5 Adding lists to the campaign.** If you have imported lists of prospects or contacts, you can optionally add these lists to the campaign plan. For details, see [Adding Imported or Internal Lists to a Campaign on page 394](#).
- 6 Generating a snapshot.** After you have designed your program logic, you can generate a snapshot manually from the Program Flow view or schedule the snapshot to automatically occur using the Schedule view. For details, see [Chapter 16, “Generating and Maintaining Snapshot Files.”](#)
- 7 Allocating segment net counts to campaigns.** After snapshot generation is completed you can distribute actual counts, or forecast percentages of counts to campaign offers. For details, see [Chapter 17, “Allocating Segment Counts to Campaigns.”](#)
- 8 Defining waved distribution and vendor lists.** To pace your distribution and avoid overloading your vendors and fulfillment center, you can set up wave periods and divide contact lists among vendors. For details, see [Setting Up Waves on page 456](#) and [Creating Vendor-Specific Lists on page 458](#).
- 9 Previewing the list.** You can preview the first 500 names in your distribution list to make sure the list is formatted correctly and contains the contact information you need. For details, see [Previewing a List on page 462](#).
- 10 Loading the campaign.** When you are ready to save your campaign lists in the Siebel database, you can perform the Load Campaign task from the Program Flow or Program Explorer views, or schedule the task using the Schedule view. Loading the campaign saves contacts in the Siebel transaction database and generates output list files and eAI list files. For details, see [Manually Loading a Campaign \(Generating a List\) on page 464](#).
- 11 Executing the campaign.** After loading the campaign and generating the lists, you can launch the campaign from the Program Flow or Program Explorer views or schedule the program start, which automatically launches the campaign. The Launch Campaign task distributes lists to vendors using FTP or email, and sends email, eNewsletter and Web offers to contacts. For details, see [Chapter 21, “Launching Programs and Campaigns.”](#)

About Multistage Programs

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

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

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

After 30 days, response information is used to:

- Send a welcome packet of information to each new credit card customer

- Offer an 8%, \$25 annual fee card to everyone who did not respond

In the initial stage of the campaign, the manager generates a snapshot, based on segment criteria, which results in a list of contacts. By default, segment criteria for a stage apply to everyone in the database, whether or not they were included in the previous stage. Successive stages can be set to add contacts who qualify or use only the list of contacts from the prior stage.

About the Program Execution Workflow

Multistage programs can be launched manually or use the automatic Program Execution workflow, with multiple processes, that trigger key events such as building the snapshot, loading a campaign (list generation), and launching a campaign (sending lists to vendors and sending offers to targeted contacts). The Program Schedule drives the process, with activities typed into Schedule, triggering the execution of each program. Each of these key events can be executed manually, using the Program Flow menu or the Program Explorer menus.

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

When the stage is activated, Siebel Marketing builds a snapshot and applies a predefined allocation of segment counts to campaign plans. Campaigns are loaded and executed, and the next stage is scheduled. This process continues until the last stage occurs, and the program is completed. Each stage of a program is a unique event, and Siebel Marketing tracks campaign and response history at the unique stage level (for each run). For more information about workflow processes and the Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Creating a Program Plan

When you create a new program plan, you specify an objective, a type (for example, Cross-sell or Win-back), a status (Planned, Active or Completed), a revenue goal, and a budget figure. You also identify the customer hierarchy, targeting level and campaign load mapping that will be used to sort and link to contact data.

When you add organizations to a program plan, those organizations are copied to the program when it is created. If a lead partner is associated with the program plan, that lead partner will also be copied to the program. Any campaign plan that is added to a program plan (using the program flow or program explorer) will inherit the program plan's organizations. The campaign plan being added will retain any existing organizations and any existing lead partner.

The organizations on the campaign plan represent the union of the program plan and campaign plan's organizations. After you add the campaign plan to the program plan, changes made to the organizations at the program plan will not be automatically reflected at the associated campaign plan level. Segments added to the program plan will not inherit the organizations. For additional information, see [“Creating a Campaign Plan” on page 312](#).

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

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

To create a program plan

- 1 From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2 In the Program Plans list, create a new record.
- 3 Complete the fields using [Table 62 on page 383](#) as a guide.
- 4 Click the More Info tab to view additional fields.

5 Save the program.

To see available fields, in the Program Plans form, click the Show more button.

Table 62. Fields in the Program Plans Form

Field	Comment
Assigned Budget	Click the Budget select button to select the program’s currency code, exchange date, and budget amount. The budget value is a top-down figure, rather than a calculated bottom-up figure such as the Expected Cost field.
Campaign Load Mapping	Required. Click the Campaign Load Mapping select button. In the Pick Campaign Load Mapping dialog box, select the predefined mapping for accessing external data sources and click OK. For details, see “Creating Campaign Load Mappings” on page 54 . If your administrator set a default campaign load mapping, this value defaults for you. The campaign load mappings that are available for selection depend on the program’s customer hierarchy and targeting level.
Customer Hierarchy	Required. Click the Customer Hierarchy select button. In the Pick Customer Hierarchy dialog box, choose the customer hierarchy for the program and click OK. For details, see “About Customer Hierarchies” on page 95 .
Forecast Expense	This read-only field displays the sum of the expense data added in the Forecast view for campaign plans associated with the program plan. For details, see “Forecasting for Campaigns” on page 416 .
Forecast Revenue	This read-only field displays the sum of the revenue predictions (based on data added in the Forecast view) for campaign plans associated with the program plan. For details, see “Forecasting for Campaigns” on page 416 .
Lead Partner	Choose a partner organization to associate with the program plan.
Organization	Click the Organization select button and select the predefined organization that will be responsible for the program plan. An organization that you assign to a program plan will be inherited by programs in that plan.

Table 62. Fields in the Program Plans Form

Field	Comment
Region	Choose the geographic region that the program targets in the list. Options are North, South, East, and West.
Start/End	Required. Defaults to the current date and time. Use the select button to change the defaults.
Status	The default program status is Planned. Options are Active and Completed. The status is changed from Planned, to Active, and Completed during automatic program execution. Manual execution of the program does not affect this field.
Summary	Type a summary that describes the program's goals.
Targeting Level	Click the Targeting Level select button and choose a level. For information on targeting levels, see "About Customer Hierarchies" on page 95.
Type	Choose the program type. Options are Acquire, Retain, Win-Back, Cross-Sell, Up-Sell.

Using the Program Wizard

You can use the Marketing Program Wizard to create a marketing program and schedule it for automatic execution. The Program Wizard is designed to be used by marketers building uncomplicated Program Flows (less than five segments and five campaigns per stage). If you wish to include more segments in your program plan, you can specify five while using the Wizard and add the other segments later.

Before starting the wizard you need to create required elements in Marketing Administration such as customer hierarchies, campaign load mapping, output file layouts, and filters. You may also wish to create your campaigns and segments ahead of time, although you can create new records for campaigns and segments while using the Wizard. Be sure to check the supporting details for the program's components before execution, including segment criteria, campaign details and filters.

Use the following procedure to start the Program Wizard.

To use the program wizard

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Program Plans list, click Program Wizard.
- 3** In the New Program Wizard, type a name for your Program and click Next.

Select the appropriate Customer Hierarchy, targeting level, and Campaign Load Mapping for the program and click Next.

- 4** Type a name for Stage 1 of your Program, complete other fields, and click Next.
 - a** Select from one to five segments to include in Stage 1 and click Next.

NOTE: If you have not created your segments yet, click New on the Segments list to create new segment records without leaving the Wizard.

- b** Type the priority for each of the segments in your stage and click Next.

Priority is used during Allocation to resolve contacts that quality for more than one segment. For Wizard fields that do not display a segment (because fewer than five were assigned to the stage), simply leave the priority values as the defaults.

- 5 Select from one to five campaign plans to include in Stage 1 and click Next.

If you have not created some of your campaign plans, you can create new campaign plan records without leaving the Wizard.

- 6 For the first segment, type the percentage of contacts that should be allocated to each campaign and click Next.

If you selected fewer than five campaigns, do not type a value in a Wizard field that does not show a campaign name.

NOTE: Repeat [Step 6](#) for each of the remaining segments and click Next.

- 7 Verify Stage 1 information and click Next to continue. If a Stage 1 entry is incorrect, click Previous to return to the Wizard form containing the incorrect information, and modify the information.

- 8 If you wish to add another stage, choose Yes and click Next to continue.

If you have completed your program stages, choose No and click Next.

- 9 To schedule the program, perform the following steps:

NOTE: If you do not wish to schedule the program, leave the fields empty and click Finish.

- a Type the start date and indicate whether the program should recur and how often.
- b To put the program on the active calendar, select Activate Schedule.
- c Click Finish.

Using the Program Flow

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

You can manually execute the program from this view. Use the right click-menu to generate a snapshot, load a campaign, and launch a campaign. You can automatically execute the program by scheduling the program. You use the calendar in the Program Schedule view to automatically invoke the workflow process and execute the server tasks.

Before setting up the Program Flow, verify that the following tasks have been completed:

- Define segments and associate them with the same hierarchy as the program.
- Define campaigns and associated offers.
- Identify internal lists that will be associated with the program.

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

- [Adding a Stage to the Program on page 388](#)
- [Using Repeating Stages Within a Program on page 391](#)
- [Assigning Segments to a Stage on page 392](#)
- [Adding a Campaign Plan to a Stage on page 392](#)
- [Adding Imported or Internal Lists to a Campaign on page 394](#)
- [Enabling Multistage Segmentation and Targeting Using Campaign History on page 395](#)

Adding a Stage to the Program

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

To add a stage to the program

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the My Programs list, select the program and click the Program Flow view tab.
- 3** In the Program Flow workspace, select the Stage object from the palette and drag and drop it on the workspace.
- 4** To complete stage details, double-click the stage object in the workspace.

- In the Stage Plan Details form, add or modify stage details, using [Table 63 on page 389](#) as a guide.

To show available fields, click the Show more button.

Table 63. Fields in the Stage Detail Form

Field	Comment
Budget	<p>Type the budgeted amount for the stage. A program may have several stages, and each stage may have a different budget.</p> <p>Click the arrow in the Budget field and use the currency controls to. type the amount, choose a currency code and exchange date.</p>
Campaign Load Mapping	<p>Required. The Campaign Load Mapping defaults to the Campaign Load Mapping associated with the program.</p> <p>Click the Campaign Load Mapping select button. In the Pick Campaign Load Mapping dialog box, select the format used to access external contact information. Click OK.</p> <p>The Campaign Load Mappings that are available for selection depend on the customer hierarchy and targeting level chosen when the program is defined. For example:</p> <p>A customer hierarchy has two targeting levels, Customer (primary or top level) and Account (secondary or lower level). A campaign load mapping is defined for each level.</p> <ul style="list-style-type: none"> ■ If the primary targeting level is selected for the program, only the format defined for that level is available. ■ If the secondary targeting level of the hierarchy is selected, campaign load mappings for both the secondary and primary targeting levels are available.
Filter	<p>Click the Filter select button. In the Pick Filter dialog box, choose the filter that will be applied to the data before a snapshot is generated and click OK.</p>
Forecast Mode	<p>Select the check box if you plan to use automatic program execution or if this is a secondary stage in a multistage program and you will use Forecast allocation rather than counts. If you select and then clear the Forecast Mode check box, counts and percentages will be cleared. For more information, see “Forecasting Allocation” on page 451.</p>

Table 63. Fields in the Stage Detail Form

Field	Comment
Lag (Days)	<p>This field is read-only for the first stage of a program, and the default value is zero. Lag days can be assigned to subsequent stages of a program, and the field displays the number of days after the start of the program that the selected stage will start.</p> <p>The number of Lag days is specified in the Campaigns > Waves view.</p>
Output File Layout	<p>Click the Output File Layout select button select the layout that will be applied to the distribution list.</p> <p>You can choose multiple formats because different campaigns in the stage might use different formats. Even within one wave of one campaign, you might split the wave and use different vendors for execution and each might have their own format.</p>
Name	Name of the stage plan. Change the stage plan name from the default value to something more meaningful such as Stage 1: Summer Program.
Objective	Type the program's objectives.
Actual Revenue, / Actual Expense	<p>Actual Revenue displays the total revenue across all campaigns associated with any campaign plans in the program plan. This value comes from the Campaign Plan Results views and updates when you click Recalculate in the Forecast or Result view of the Campaign screen.</p> <p>Actual Expense displays the total costs across all campaigns associated with any campaign plans in the program plan. This value comes from the Results views of the Campaign screen and updates when you click Recalculate in the Forecast or Result view of the Campaign screen.</p>
Source Code	The default is the record identifier for the stage. Change the identifier for the stage source code if desired, but make sure the value is unique.
Source Code Format	Click the Source Code Format select button. In the Pick Source Code Format dialog box, select the source code format that concatenates individual program component source codes. Click OK.
Summary	Type summary text that describes the stage's implementation.

Using Repeating Stages Within a Program

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

NOTE: By default, contacts that were contacted in a previous run of a stage are automatically excluded from subsequent runs of the same stage.

To specify a repeating stage

- 1 From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2 In the Program Plans list, select your multistage program and click the Stages view tab.

NOTE: You cannot repeat Stage 1.

- 3 In the Stages list, select the stage that you wish to repeat and complete the fields using the following descriptions:

Field	Description
Lag (Days)	The number of days after the start of the previous stage that the selected stage should begin.
Repeat Every / Units	Repeat frequency. For example, if the stage should repeat every 7 days, type 7 in the Repeat Every field and type Days in the Units field.
Until Day	Type the number of days that the stage will run. This value cannot be greater than the Lag (Days) value for the next stage. All repeats of a stage must complete before the next stage can begin.

Assigning Segments to a Stage

You previously defined segments with criteria derived from attributes, buckets, numeric and date measures, and database fields. Now you can assign these segments to the program stage.

To add segments to the program stage

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Program list, select the program and click the Program Flow view tab.
- 3** In the Program Flow workspace, select the Stage object.
- 4** In the palette, select the Segment object and drag the object to the workspace.
- 5** In the Pick Segment dialog box, select the predefined segment and click OK.
 - a** To create a new segment, click New in the Pick Segments dialog box and type a name and description.
 - b** In the Pick Segments dialog box, select the new segment and click OK.

The segment object appears in the workspace.
 - c** Double-click the segment object to open the Edit Segment view, where you can define the segment's criteria.

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

NOTE: You can only use segments in your marketing programs that have defined criteria. After creating a new segment and adding it to the program, you must go to the Edit Segment view to define the relevant criteria. For instructions, see [“Building Segment Definitions” on page 226](#).

Adding a Campaign Plan to a Stage

If you previously defined and saved campaigns with associated offers using the All Campaign Plans form, you can add them to the Program Plan.

To add predefined campaigns with associated offers

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Programs list, select the program and click the Program Flow view tab.
- 3** In the Program Flow workspace, select the Stage object.
- 4** In the palette, select the Campaign Plan object and drag it from the palette to the workspace.
- 5** In the Pick Campaign dialog box, select the campaign, and click OK.

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

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

- 1** In the Pick Campaigns dialog box, click New.
- 2** In the Pick Campaign form, type a name and description for the campaign and save the record.
- 3** In the Pick Campaign dialog box, select the campaign and click OK.
- 4** In the workspace, double-click the Campaign object to open the Campaign detail form.
- 5** Click the menu button and choose Edit Record to add details.
- 6** Click the Offers view tab.
- 7** In the Offers list, create a new record.
- 8** In the Add Offer dialog box, select an offer and then click OK.

- 9 Click the Waves view tab and change the percentage in the default wave, if desired.

The Waves list shows a default wave of 100%. For more information on waves, see [Chapter 18, “Specifying Waves and Vendor-Specific Lists.”](#)

- 10 Save the record before defining additional waves.
- 11 To define another wave, create a new record.

NOTE: In some marketing programs, a control segment of customers may be targeted by a test campaign with no associated offer, to gauge response to the offer. For details, see [“Testing Campaign Offers Before Launching a Campaign” on page 354.](#)

Adding Imported or Internal Lists to a Campaign

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

To add a list to the campaign

- 1 From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2 In the Programs list, select the program and click the Program Flow view tab.
- 3 In the Program Flow workspace, select the Campaign Plan object.
- 4 From the object palette, select the List object and drag it to the workspace.
appears.
- 5 In the Pick List dialog box, select an imported or internal list and click OK.

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

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

Enabling Multistage Segmentation and Targeting Using Campaign History

By default, any customer in your database can be included in any stage of a program plan. This means that segment members are not automatically restricted to people who were targeted or who responded to a previous stage. The following are some examples of reasons you might need to use campaign history to select segment members in a stage:

- To include or exclude customers who were part of a particular program or campaign.
- To exclude customers who have had marketing activity in the last 60 days.
- To exclude customers who have been targeted more than five times in the last year.
- To include customers who were targeted based on a particular wave.
- To include customers who have responded by purchasing a product.
- To include, as part of an output list, the most recent date that the customer was targeted.

This history information can be mapped directly from the Siebel transactional database and can be used to build segmentation or filter criteria. If the customer uses the Siebel eBusiness Data Warehouse, the Promotion star schema may be used for mapping.

NOTE: Siebel Analytics uses third-party products for the extract, transform, and load (ETL) process. This process draws specific data from the Siebel transactional database (OLTP), transforms the data, and loads the data into the Siebel eBusiness Data Warehouse (OLAP). The load process builds a series of star schemas. Siebel Analytics uses these star schemas as the basis for reports and graphs.

For more information about this process and Promotion star, see *Siebel Data Warehouse Data Model Reference*.

You can allow segmentation by creating attribute families based on stage campaign history in the following ways:

- Create attribute families from the Siebel Data Warehouse.

- Create attribute families from the Siebel Database.

For more information about attribute families, see [“Defining Attribute Families” on page 130](#). For more information about mapping tables and joining tables and fields, see [Chapter 4, “External Data Mapping.”](#)

Creating an Attribute Family From the Siebel Data Warehouse Campaign History

Creating attribute families based on stage campaign history allows you to use segmentation. One method is to use campaign history from the Siebel data warehouse.:

To create an attribute family from the Siebel data warehouse campaign history

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Tables view tab and in the Tables list perform the following tasks:
 - a** In the Tables list, create mappings to W_PERSON_D and W_CAMPHIST_F.
 - b** In the Tables list, create the following new records for the W_PROGRAM_D table:
 - Create a record for W_PROGRAM_D and place a constraint on it for records in which the Type value is Campaign Occurrence. Give the table a reference name of Campaigns.
 - Create a record on W_PROGRAM_D and place a constraint on it for records in which the Type value is Stage Occurrence. Give the table a reference name of Stages.
 - Create a record on W_PROGRAM_D and place a constraint on it for records in which the Type value is Program Occurrence. Give the table a reference name of Programs.
- 3** Click the Joins view tab and create the following joins:

- a Create two table joins using the information in the following table:

Parent Field.Table	Child Field.Table	Cardinality
CON_ID.W_PERSON_D	CON_ID.W_CAMPHIST_F	N:N
PROG_ID.W_CAMPHIST_F	PROG_ID.Campaigns	N:

- b Create a start point join to the W_PERSON_D table.
- 4 From the show drop-down list, select the Attributes view.
- 5 In the Attribute Families list, create a new attribute family called Program Hlstory, setting the Base Field to PROG_ID.
- 6 In the Attributes list, create new records as shown in the following list:

Code Table	Code Field	Label Table	Label Field
Programs	Name	Programs	Name
Stages	Name	Stages	Name
Campaigns	Name	Campaigns	Name

- 7 Click the Attribute Hierarchies view tab and create a three-level hierarchy as shown in the following list:
- Level 1 = Programs
 - Level 2 = Stages
 - Level 3 = Campaigns

Creating an Attribute Family From the Siebel Database Campaign History

Creating attribute families based on stage campaign history allows you to use segmentation. One method is to use campaign history from the Siebel database.

Use the following guidelines to create an attribute family from the Siebel transactional database campaign history:

- Make sure that S_CAMP_CON and S_DD_USER_KEY are mapped in the Marketing Repository. For instructions, see [“Initializing Multistage Programs” on page 41](#).
- The following is a list and brief description of the tables you use:
 - S_CAMP_CON. The primary campaign history intersection table between the CAMPAIGNS and CONTACTS tables. CAMP_CON_NUM is the source code field in this table.
 - S_SRC. The table that stores campaign occurrences, campaigns, stages and programs and their details.
 - S_CONTACT. The table that stores the details about contacts.
 - S_DD_USER_KEY. A cross-reference table between external database keys and Siebel contact ID.
 - S_CALL_LST. The segments table.
 - S_S_DD_CAMP_WAVE. The lookup table for waves.
 - S_DD_LST_DRSTR. The table that stores the list distribution details.
 - S_ORG_FUL. The Vendor table.

To create an attribute family from the Siebel database campaign history

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > External Data Mapping.
- 2** Click the Tables view tab and in the Tables list map the tables as shown in the following table.

Reference Name	Table Name	Restriction
Program Table	[DB Owner].S_SRC	CAMP_TYPE_CD = 'PROGRAM CONTAINER'
Stage Table	[DB Owner].S_SRC	CAMP_TYPE_CD = 'PROGRAM'

Reference Name	Table Name	Restriction
Campaign Table	[DB Owner].S_SRC	CAMP_TYPE_CD IS NULL
S_CAMP_CON	[DB Owner].S_CAMP_CON	
S_DD_USER_KEY	[DB Owner].S_DD_USER_KEY	

3 Click the Joins view tab and create the following joins:

Parent Table	Child Table	Parent Field	Child Field	Cardinality	Cache (Y/N)
External Source Table (Sort-Merge Join)	S_DD_USER_KEY	[CH Field 1]	Key1	1:1	N
		[CH Field 2]	Key2		
		[CH Field n]	Key[n]		
S_DD_USER_KEY	S_CAMP_CON	ROW_ID	DD_USER_KEY_ID	1:N	Y
S_CAMP_CON	Campaign Table	SRC_ID	ROW_ID	N:1	Y
Campaign Table	Stage Table	TEMPL_ID	ROW_ID	N:1	Y
Stage Table	Program Table	TEMPL_ID	ROW_ID	N:1	Y

4 From the show drop-down list, select the Attributes view.

5 In the Attribute Families list, create a new attribute family called Program HHistory, setting the Base Field to PROG_ID.

6 In the Attributes list, create new records as shown in the following list:

Code Table	Code Field	Label Table	Label Field
Programs	Name	Programs	Name
Stages	Name	Stages	Name
Campaigns	Name	Campaigns	Name

7 Click the Attribute Hierarchies view tab and create a three-level hierarchy as shown in the following list:

- Level 1 = Programs
- Level 2 = Stages
- Level 3 = Campaigns

You can map a hierarchical attribute to the Program, Stage and Campaign tables and use the resulting hierarchy in segmentation criteria. You need to map the ROW_ID (Campaign Table) for the base field, map the NAME for the Label, and map the ROW_ID for the Code field for each Hierarchical level. This mapping imports the containers, not the individual occurrences. To import the occurrences, the condition for the Program table must be changed to CAMP_TYPE_CD = 'PROGRAM CONTAINER OCCURRENCE' and Stage table must be changed to CAMP_TYPE_CD = 'PROGRAM OCCURRENCE'.

NOTE: The Base Field for the attribute family should always be mapped to the ROW_ID of the lowest level. In our example, it is ROW_ID of the Campaign table.

To map a hierarchical attribute for use in segmentation criteria

- 1** From the application-level menu, choose View > Site Map > Marketing Administration > Attributes.
- 2** Select the Attribute Families view tab and in the Attribute Families list, create a new record.
- 3** Map the Campaign table to the base table and map ROW_ID to the base field using the following information.

Name	Base Table	Base Field
Program Hierarchy	Campaign	ROW_ID

- 4 In the Attributes list, create the following records.

Name	Code Table	Code Field	Label Table	Label Field
Program	Program	ROW_ID	Program	NAME
Stage	Stage	ROW_ID	Stage	NAME
Campaign	Campaign	ROW_ID	Campaign	NAME

- 5 Click the Attribute Hierarchies view tab and create a new record using the following information.

Name	Attribute Family
Program Hierarchy	Program Hierarchy

- 6 In the Attribute Hierarchy Levels list, create the 3 records using the following information.

Sequence	Attribute
1	Program
2	Stage
3	Campaign

- 7 Click the Attribute Families view tab.
- 8 In the Attribute Families list, select the program hierarchy attribute family and click Retrieve Data.

Designing Marketing Program Plans

Using the Program Flow

Planning and Budgeting for Marketing **14**

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

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

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

This chapter discusses the creation of marketing plans and subplans.

Creating a Marketing Plan

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

The Show drop-down list provides several levels of visibility, including the following views:

- My Marketing Plans displays marketing plans for which you are on the team.
- All Marketing Plans displays marketing plans in your assigned organizations.
- All Marketing Plans across My Organizations displays marketing plans that exist in your organizations and in any suborganizations in your organizations.
- All Marketing Plans across Organizations displays the marketing plans that exist in all organizations in the your Siebel Application.

To create a marketing plan

- 1** From the application-level menu, choose View > Site Map > Marketing Plans > My Marketing Plans.
- 2** In the Marketing Plans list, create a new record.
- 3** Complete the fields using [Table 64 on page 405](#) as a guide.

NOTE: The Forecast Revenue, Forecast Expenses, Actual Revenue, Actual Expenses and Total Funds fields contain read-only values that are determined by calculations from other views. For more information about these fields, see [“To calculate forecast and actual expenses for the marketing plan” on page 411](#) and [“To associate a fund request with a marketing plan” on page 412](#).

Table 64. Marketing Plans Fields

Field	Description
Assigned Budget	Optional. A user-typed value for the amount of money approved for use on the marketing plan.
Budget Period	Optional. You associate the budget period with the plan for expense recognition. For example, you might need to track a quarterly or annual budget period.
Code	Required. An identification code determined by the user. Must be a unique value.
Comments	Optional. A text field for any special comments for the plan.
Execution Period	Optional. The period in which the plan will actually be executed.
Executive Approval	Optional. A status field indicating whether the plan has been approved by the appropriate executive.
Marketing Approval	Optional. A status field indicating whether the plan has been approved by the appropriate marketing director.
Name	Required. The name of the marketing plan.
Objective	Optional. A text description of the objective of the marketing plan.
Organization	Optional. A multi-value field displaying all organizations associated with the plan. All organizations that appear in this list have visibility to the plan.
Parent Plan	Optional. Choose a parent plan in this field when you want to make the current marketing plan record a subplan (child marketing plan). By selecting a parent plan you associate it with another marketing plan (child or subplan). One marketing plan can only have only parent plan. One parent plan can have multiple subplans.
Product Lines	Optional. A dialog box containing product lines associated with this plan. May include one or more product lines.
Products	Optional. A dialog box containing products associated with this plan. May include one or more products.
Region	Optional. A listing of regions that you can associate with this plan.

Table 64. Marketing Plans Fields

Field	Description
Team	Optional. A multi-value field containing members of the team for the plan.
Type	Optional. A list of the category types of marketing plans. Values include Corporate, Regional, Business Unit, and Department.

Creating a Marketing Subplan

A marketing plan that has a parent marketing plan is called a subplan. A marketing plan can have any number of other subplans (child marketing plans). For example, an annual plan may have four subplans, one for each quarter. For example, Q1Plan, Q2Plan, Q3Plan, and Q4Plan.

To create a subplan

- 1 From the application-level menu, choose View > Site Map > Marketing Plans > My Marketing Plans.
- 2 Click the Subplans view tab.
- 3 In the Subplans list, create a new record.
- 4 Complete the fields using the values in [Table 64 on page 405](#).
 - a In the Marketing Plans form, click the Parent Plan select button.
 - b Choose the parent plan for this subplan and click OK.

Changing a Marketing Plan to a Marketing Subplan

You can change an existing marketing plan to a subplan by associating it with the parent marketing plan.

To change a marketing plan to a marketing subplan

- 1 From the application-level menu, choose View > Site Map > Marketing Plans > My Marketing Plans.

- 2 In the Marketing Plans list, query for the marketing plan that you want to change to a subplan.
- 3 In the Marketing Plans form, click the Parent Plan select button.
- 4 In the Pick Marketing Plan dialog box, choose the marketing plan that you want to be the parent marketing plan and click OK.

Setting Goals for the Marketing Plan

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

To create a goal for a marketing plan

- 1 From the application-level menu, choose View > Site Map > Marketing Plans > My Marketing Plans.
- 2 In the Marketing Plans list, query for the marketing plan.
- 3 Click the Goals view tab.
- 4 In the Goals list, create a new record.
- 5 In the new record, select the Goal using values in [Table 65 on page 408](#) and complete one of the following steps:
 - If the goal is a financial goal, type the target value for the goal in the Target Amount column.
 - If the goal is a non-financial goal, type the target value for the goal in the Target Quantity column.
- 6 If you know the expected forecast value, type the forecast value in the Forecast Amount column. If you do not know the expected forecast value, leave the forecast column empty and type the value after you develop a forecast.

NOTE: If the goal has a Number Format of Percentage be sure to type whole number values, not decimal values. For example, an ROI goal of 15% should be typed as 15, not .15.

Table 65. Values for the Goals Field

Goal	Number Format Default	Description
Average Cost per Lead	Currency	The expected cost of all marketing activities in the plan divided by the number of sales leads generated
Average Cost per Opportunity	Currency	The expected cost of all marketing activities in the plan divided by the number of sales opportunities generated
Average Cost per Order	Currency	The expected cost of all marketing activities in the plan divided by the number of sales orders generated
# Leads	Integer	The number of sales leads this plan is expected to yield. The definition of lead may vary based on your company's business process.
# Opportunities	Integer	The number of sales opportunities this plan is expected to yield
# Orders	Integer	The number of sales orders this plan is expected to yield
Revenue Goal	Currency	The incremental revenue that this plan is expected to yield
ROI %	Percentage	The percent Return on Investment that this plan is expected to earn
Unit Volume	Integer	The number of product units that are expected to be sold as a result of this plan

Associating Marketing Plan Tactics With the Marketing Plan

A plan tactic is a marketing program, event, or standalone campaign that you have associated with a marketing plan. A marketing plan can be associated with any number of marketing programs, events, or standalone campaigns.

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

To associate a plan tactic with a marketing plan

- 1** Create a marketing program, event, or standalone campaign.
- 2** From the application-level menu, choose View > Site Map > Marketing Plans.
- 3** In the Marketing Plans list, query for the appropriate marketing plan.
- 4** Click the Plan Tactics view tab.
- 5** In the Plan Tactics list, create a new record.
- 6** In the Plan Tactics dialog box, query for the program, event, or standalone campaign that you want to associate with the plan and click OK.

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

- 7** You can modify all the fields in this record except Plan Item, Type, and Organization.

Developing and Assigning Budgets for a Marketing Plan

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

- **Assigned Budget.** The amount of money that has been approved for use on the tactics and activities within the marketing plan. The Assigned Budget value is typically input by a marketing executive with budget approval authority.
- **Forecast Expenses and Revenues.** -The total forecast expenses and revenues across subplans and tactics in the marketing plan. These values are automatically calculated using the values from fields shown in [Table 66](#).

Table 66. Forecast Expenses and Revenues Source Fields

Contributing Product Area	Where to find it
Marketing Plan - Subplans	Marketing Plans screen, Subplans view tab.
Program Plan Expenses	Programs screen, Expenses view tab.
Campaign Plan Forecasts	Campaigns screen, Forecast view tab.
Event Costs	Events screen, Cost view tab (estimated cost column).
Event Revenues	Events screen, Revenue view tab (estimated revenue column).

- **Actual Expenses and Revenue.** The total actual expenses and revenues across all subplans and tactics in the marketing plan. These values are automatically calculated using the values from fields shown in [Table 67](#).

Table 67. Actual Expenses and Revenue Source Fields

Contributing Product Area	Where to find it
Marketing Plan - Subplans	Marketing Plans screen, Subplans view tab.
Program Plan Expenses	Programs screen, Status view tab.
Campaign Plan Results	Campaigns screen, Results view tab.
Event Costs	Events screen, Cost view tab (actual cost column).
Event Revenues	Events screen, Revenue view tab (actual revenue column).

Recalculating a Marketing Plan

When you recalculate a marketing plan, the application automatically refreshes the totals for the forecast and actual expenses and revenues from all the contributing product areas. The application notifies you when the recalculation is complete and the updated forecast and actual values appear in the marketing plan views.

If a marketing plan has subplans, the application automatically includes the subplans' forecast and actual totals in its calculation. The recalculation also automatically refreshes any campaign plan forecasts and actuals as part of the update.

You can update your marketing plan forecast and actual expenses and revenues at any time. For a description of the elements that are included in the calculation, see [Table 66 on page 410](#) and [Table 67 on page 410](#).

CAUTION: Closing the browser window before the recalculate is completed will abort the “recalculate” with incomplete results. Be sure to wait until the completion summary window appears before exiting the browser.

You can reschedule the recalculate functionality to run automatically by including the rollup business service in a workflow process. This is particularly useful for keeping the recalculated totals coordinated with ETL processes which populate a Data Warehouse for Campaign Analysis. The name of business service that can be used for this purpose is Marketing Plan Recalculation.

To calculate forecast and actual expenses for the marketing plan

- 1 From the application-level menu, choose View > Site Map > Marketing Plans.
- 2 In the Marketing Plans list, select the marketing plan and click Recalculate.

To assign a budget to marketing plan tactics

- 1 From the application-level menu, choose View > Site Map > Marketing Plans.
- 2 In the Marketing Plans list, query for the appropriate marketing plan.
- 3 Click the Plan Tactics view tab and verify that you have associated your targeted programs, events, and standalone campaigns.

For information on associating plan tactics, see [“Associating Marketing Plan Tactics With the Marketing Plan” on page 409](#).

- 4 Click the Budget view tab.
- 5 Type the approved budget amount in the Assigned Budget column.

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

Associating Fund Requests With a Marketing Plan

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

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

To associate a fund request with a marketing plan

- 1 From the application-level menu, choose View > Site Map > Fund Requests > My Fund Requests.
- 2 In the Fund Requests list, locate and select the fund request.
- 3 In the Fund Request form, click the Marketing Purpose select button.

To see the Marketing Purpose field, you may need to add the column. In the Marketing Plans form, click the menu button, choose Columns Displayed, and add the column.

- 4 In the Pick Source dialog box, locate and select the marketing plan.

To view a fund request associated with a marketing plan

- 1 From the application-level menu, choose View > Site Map > Marketing Plans.
- 2 In the Marketing Plans list, query for the appropriate marketing plan.
- 3 Click the Funds view tab.

Only associated fund requests appear in the list.

Attaching Documents to a Marketing Plan

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

To attach a document to a marketing plan

- 1 From the application-level menu, choose View > Site Map > Marketing Plans.
- 2 In the Marketing Plans list, query for the appropriate marketing plan.
- 3 Click the Documents view tab and create a new record.
- 4 Click the Attachment Name select button, locate the document on your local machine or network, and click Open.

Using the Marketing Plan Explorer

You can use the Plan Explorer to review the organization of your marketing plans and its associated plan tactics.

To use the Plan Explorer

- 1 From the application-level menu, choose View > Site Map > Marketing Plans > Plan Explorer.
- 2 Expand the Marketing Plans folder.
- 3 To see subplans associated with a marketing plan, expand a marketing plan folder.
- 4 To see plan tactics associated with a marketing plan, expand a plan tactics folder in the parent plan folder.

Program and Campaign Management Tools **15**

Siebel Marketing's program and campaign organizational tools allow management of activities, milestones, documentation and schedules for your marketing campaign plans.

- **Forecast.** Siebel Marketing offers cost management for marketing program and campaign plans. Forecast allows the marketing manager to predict the cost and revenue for each campaign plan within a marketing program. These figures are automatically rolled up and associated with the marketing program.
- **Activity Plans.** Siebel Marketing's Activity Plans can help you help you plan and execute the marketing program's activities and milestones.
- **Timelines.** Program plan, campaign plan, and campaign charts provide an at-a-glance weekly and monthly overview of planned, active and completed programs and campaigns.
- **Campaigns Explorer.** The Campaigns Explorer provides an overview of campaigns and their associated components. The dual-tree pane view provides a list of campaigns, contacts, activities and offers on the left side. When you drill down on each element, details are displayed on the right side of the view.
- **Program Explorer.** The Explorer view in the Programs screen provides a view of the marketing program's stages and campaigns. It is an alternate way to create and view program plans.
- **Document Library.** The Documents view in the Programs screen allows you to create a library of proposals, white papers, artwork and other files associated with the marketing program.

Forecasting for Campaigns

The Forecast view tab in the Campaigns screen allows you to examine the financial outlook of a marketing campaign based on your budget numbers and other assumptions you add.

- Details of the selected campaign appear in the Campaign Plans form.
- The Forecast PREDICTED RESULTS read-only form displays the results after calculations have been performed on the modeled data.
- The other input view tabs allow you to type values for segments, lists, costs, and so on.

A marketing analyst might model a number of different campaign scenarios by varying the segment count, response rate, conversion rate, and so, on to test the expected results for different types of campaigns or response rates. By changing the predicted response and conversion rates, the analyst can determine what the high-end (optimistic) and low-end (pessimistic) predicted results are for each campaign as well as show results within a range of predicted values.

You can choose to model using an estimated total count and average response and conversion rates by typing them in the input summary form, or can type individual values for each segment and list on their respective input applets. Select the Use Segment and List Data menu option if you wish to use these individual inputs, and in either case, use Recalculate to update the predicted results.

To restrict the model to actual segment and list data without recalculating, click the menu button in the Input Summary form and choose Use Segment/List Data. This will use the assumptions for counts, response rates, and conversion rates you add in the Segment Inputs form and List Inputs form. Selecting the Use Segment/List Data overwrites your existing totals for counts, response rates, and conversion rates.

Forecast is also integrated with the Marketing Analysis reports in Siebel Analytics to provide financial reporting by program and campaign plans.

The marketing reports use your inputs from Forecast to calculate predicted and actual values for revenue, margins, costs, response rates and ROI. In the reports, each set of Forecast assumptions is applied to each campaign. You can type your Forecast inputs as average values across all campaigns to estimate the predicted compared to the actual financial results of each campaign plan.

Creating Forecasts

Use the following procedure to create a Forecast for your campaign plan.

To create forecasts

- 1** From the application-level menu, choose View > Site Map > Campaigns.
- 2** In the Campaign Plans list, select a campaign plan and click the Forecast view tab.
- 3** Scroll down to the subview tabs where you can perform the following tasks:
 - a** In the Cost Inputs list, you can add a new record and update the fields.
 - b** In the Input Summary, Segment Inputs, List Inputs, and Cost Allocation Inputs lists, you can update the fields.
- 4** Scroll up to the Forecast form and click Recalculate to display a refreshed total after you type new data.

Adding Campaign Plan Costs

Use the Cost Input form to add individual records for predictive costs associated with the campaign plan.

- Fixed costs can be two types of expenses, Per Campaign Plan and Per Campaign. You allocate Per Campaign expenses once for each campaign in the Campaign Plan. You allocate Per Campaign Plan expenses only once for the Campaign Plan. Fixed costs are costs you incur regardless of how many contacts receive an offer. Examples are artwork costs, design charges, set-up fees, and so on. When you select fixed and the cost type, the Per: (customer) field is inactive.
- Outbound costs are variable expenses that reflect how much it costs to implement the offer per contact. Outbound costs have the expense type of Per Outbound Contact. Examples are printing or postage charges.
- Inbound costs are expenses associated with managing responses to the campaign plan, such as the cost per inbound phone call. Inbound costs have the expense type of Per Inbound Contact.

To add campaign plan costs

- 1** From the application-level menu, choose View > Site Map > Campaigns.
- 2** In the Campaign Plans list, select a campaign plan and click the Cost Input view tab.
- 3** In the Cost Input list, create a new record.
- 4** Type a descriptive name for the cost.
- 5** Choose the cost type (Per Campaign Plan, Per Campaign, Per Outbound Contact, Per Inbound Contact) from the list.
- 6** Click the Cost select button.
- 7** In the dialog box type a value and then click OK.

For costs of type Per Campaign Plan or Per Campaign type a single fixed value. For variable costs (Per Inbound and Per Outbound Contact), type the estimated number of contacts and respondents along with a unit cost per interaction.

- 8** Type a value in the Per: (contact) field.

This field is inactive if the Type is fixed cost.

NOTE: Repeat [Step 1](#) through [Step 8](#) until you have added and saved the individual records for each cost associated with the campaign plan.

- 9** In the Predicted Results form, click Recalculate.

During a recalculation, individual values are calculated and displayed in the Predicted Results and Input Summary forms.

Adding Segment Inputs

Clicking the Segment Inputs view tab displays segments assigned to the marketing program stage that includes the campaign plan. Type assumptions about segment counts, response rates and conversion rates in the fields. Clicking the menu button in the Input Summary form, and choosing Use Segment/List Data restricts the model to entries you have made.

To add segment inputs

- 1** Click the Segment Inputs view tab.

The Segment Inputs list appears, displaying each segment associated with the campaign plan.

- 2** Complete the fields.

- a** Count: Type the estimated number of targeted customers associated with the campaign plan.

- b** Response Rate %: Type the predicted response rate as a percentage (0-100).
For example, for 2.5%, type 2.5.

- c** Conversion Rate %: Type the predicted percentage of respondents who will purchase the product (0-100).

- d** (Optional) Coded Responses %. Type what % of your responses you expect to include source codes or offer codes.

- 3** Save the record.

- 4** In the Predicted Results form, click Recalculate.

During a recalculation, individual values are calculated and displayed in the Predicted Results form, and in the Input Summary view tab form.

Using the Input Summary Form

In the Input Summary form, you can add estimated Revenue per Sale, and Contribution per Sale values, as well as view summary information for inbound, outbound and fixed costs, segment and list counts, response rate and conversion rate percentages.

If you are restricting the model to Segment Inputs and List Inputs, click the menu button and choose Use Segment/List Data.

To add revenue or contributions per sale assumptions

- 1 Click the Input Summary view tab.
- 2 In the Revenue per Sale field, type the average total dollar amount of each sale generated by the campaign plan.

For example, if you hope to sell two items to each customer at \$100 each, type \$200.
- 3 In the Contribution per Sale field, type the average gross margin contribution for each sale.

For example, if you are selling \$100 items that cost \$60 to produce, type \$40.
- 4 Save the record.
- 5 Click Recalculate.

During a recalculation, individual values are calculated and displayed in the Predicted Results form.

NOTE: When you load a campaign, you specify if you want the costs from the Campaign Plan forecast to be copied to the Campaign. If you want to copy the revenue, cost, segment, and list inputs to the campaign, check the Copy to Campaign check box on the Input Summary form.

Using List Inputs

The List Inputs view tab displays lists assigned to the marketing program.

To use assumptions based on list inputs

- 1 Select a list, and in the List Input fields type assumptions for Counts, Response Rate % and Conversion Rate % in the fields.
- 2 Click the Input Summary view tab.
- 3 In the Input Summary form, click the menu button and then choose Use Segment/List Data to calculate the assumptions for Counts, Response Rate %, and Conversion Rate % typed in the List Inputs fields.

Results appear in the Input Summary form. Selecting Use Segment/List Data will overwrite your existing totals for counts, response rates, and conversion rates.

Calculated Fields in Forecast

After you type values in the Input tab fields and click Recalculate, Forecast performs a number of calculations. The results appear in Forecast’s Predicted Results form. These calculations are detailed in [Table 68](#).

Table 68. Calculated Fields in Forecast

Field	Calculation Formula and Description
# Responses	# Responses = Response Rate * Count. Expected number of responses to your campaign plan.
# Sales	# Sales = Conversion Rate * # Responses. Expected number of sales generated by your campaign plan.
Revenue	Revenue = # Sales * Revenue Per Sale. Expected revenue generated by your campaign plan.
Gross Margin	Gross Margin = Contribution per Sale * # Sales. Expected profit margin from sales generated by your campaign plan.
Marketing Cost	Marketing Cost = Fixed Cost + Outbound Cost + Inbound Cost. Expected cost of designing and executing your campaign plan.
Net Margin	Net Margin = Gross Margin - Marketing Cost. Expected total profit from sales generated by your campaign plan.
Cost/Response	Cost/Response = Marketing Cost / # Responses. Expected cost per response generated by your campaign plan.
Cost/Sale	Cost/Response = Marketing Cost / # Sales. Expected cost per sale generated by your campaign plan.
ROI %	(Net Margin - Marketing Cost) / (Marketing Cost * 100). Expected return on investment for your campaign plan.

Tracking Campaign Results under a Forecast

You can track the performance for each campaign based on a Campaign Plan using the Campaign Plan Results view. This view appears next to the Campaign Plan Forecast view and displays the actual revenue, expenses, response rates, and ROI for each campaign.

To add the campaign results, select the campaign from the campaign list in the Results list. With a campaign selected in the list, each Result Input will be credited to that Campaign.

You can see that the Results view contains the same set of inputs as the Campaign Plan Forecast: Results Summary, Segment Results, List Results, Revenue Results, Cost Results, Cost Allocation Results. Use each of these tabs to record the actual results that your campaign achieved.

If you selected Copy to Campaign on the Campaign Plan Forecast (Input Summary), the forecast values from the forecast tabs are copied to each of the Result tabs. In this case, you will probably not need to add new records for most of your data, because the forecast value is already added. To add the actual amount spent for each forecasted input, type the values in the Actual columns on each tab. If required, you can also add new Costs in the Cost Results view that were not included in the original forecast. For new cost records, select the cost type (Per Campaign, Per Inbound Contact, or Per Outbound Contact). The forecast columns will equal zero.

Refreshing Values for Campaign Result Inputs

Several of the fields in the Results view can be automatically updated from the real data in the transaction database. The following is a list of fields that can be refreshed:

- **Count.** The count of contacts or prospects in the campaign.
- **Segment Count.** The count of contacts in the campaign from each Segment.
- **List Count.** The count of contacts in the campaign from each List.
- **# Responses.** The count of response records associated with that campaign.

To update these values with the most recent information, click the Refresh Values button in the Results Summary form and then refresh the view to display the new values. After these fields are updated, you can recalculate the entire financial model by clicking the Recalculate button in the Results list.

The campaign results summary will also be recalculated anytime the marketing plan is recalculated that includes the campaign plan.

About Timelines

Timelines are available for program and campaign plans and individual programs and campaigns. Timelines provide calendar view of scheduled and recurring campaigns and programs, in a Gantt chart format. The chart is divided into weeks and months. Start field and End field values determine the placement of the timeline bars.

Types of Timelines

The Program Plans timeline. This timeline chart shows planned, active, and completed program plans. It is immediately visible when logging onto the Siebel Marketing home page. Alternately, you can navigate to the Programs screen and choose Timeline from the Show drop-down list.

The Campaign Plans timeline. This timeline shows planned, active and completed campaign plans. To see the campaign plans timeline, navigate to the Campaigns screen and choose Timeline from the Show drop-down list.

The Status timeline. This timeline shows each program or campaign. To see the Status timeline, select a campaign plan in the All Campaign Plans list or a program plan in the All Program Plans list. Then click the Status view tab and choose Timeline from the Show drop-down list.

The Status Timeline view is helpful when you want to verify the status of a specific campaign in a multistage recurring campaign.

Using Timelines

Timelines help you determine that scheduling is appropriate and on track for planned marketing efforts.

Understanding Color-Coded Status Bars

Timeline bars are color-coded to help you identify the status of programs and campaigns. You can place the cursor over a timeline bar to display more details.

Program plan and campaign plan timelines use the following status colors:

- Active: Green
- Planned: Yellow
- Completed: Gray

Status (programs and campaigns) timelines use the following status colors:

- Error: Red
- Manual: Light Blue
- Active: Green
- Pending: Yellow
- Finished: Gray

Navigating To and From Timelines

The following list contains helpful information about navigating timelines:

- In the Programs screen's Timeline view, you can navigate in the following ways:
 - Click the timeline bar to see the Status Timeline view for a program.
 - Drill down on the program plan name to see the Program Flow.
- In the Programs screen's All or My Program Plans view, you can navigate in the following ways:
 - Drill down on the program plan name to see the Program Flow.
 - Select a program plan, click the Status view tab, choose timeline from the Status list's show drop-down list, and drill down on the program name to access details for the program plan.

- In the Campaigns screen's Timeline view, you can navigate in the following ways:
 - Click the campaign timeline bar to display the status timeline for the campaign. In the Status timeline you can drill down on a campaign name to access views (such as Offers and Activities) that are associated with the campaign.
 - Drill down on the campaign plan name to display offers associated with the campaign plan.
- In the Campaigns screen's All Campaign Plans view, you can navigate in the following ways:
 - Drill down on the name of a campaign plan and see offers associated with the campaign plan.
 - Select a campaign plan, click the Status view tab, and a list of campaigns for the campaign plan appears. In the Status list you can drill down on a campaign name to access views (such as Offers and Activities) that are associated with the campaign.

Creating and Using Activity Plans

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

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

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

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

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

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

Creating Activity Templates

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

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

To create an activity plan template

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

To create activities for the template

- 1** From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
- 2** In the Activity Plan Templates list, select a template.
- 3** Click the Activity Template Details view tab.
- 4** In the Activity Template Details list, create a new record.
- 5** Complete the necessary fields for each activity assigned to the template.

- 6 From the drop-down list, choose an activity type.

NOTE: Repeat [Step 2](#) through [Step 6](#) to add activities to the template.

- 7 Save the activity.

Associating Activity Plans with Programs and Campaigns

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

NOTE: Siebel Communications Server includes several predefined recipient groups. A recipient group is a group of people who are to receive particular communications. DBM Campaign Recipient is among the predefined recipient groups, with the underlying Siebel business object (DBM Campaign) and business component (Campaign Recipient). For more information on Recipient Groups for outbound communications, see *Siebel Communications Server Administration Guide*.

The Activity Plans view consists of:

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

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

- 1 From the application-level menu, choose View > Site Map > Campaigns or Programs screen.
- 2 In the My Campaign Plans or My Program Plans list, select the campaign or program.

- 3** Click the Activity Plans view tab.
- 4** In the Activity Plans list, create a new record.
A new row appears in the list, and the Recurring field displays a check mark.
- 5** Complete the necessary fields.
 - a** Click the Template select button.
 - b** In the Pick Template dialog box, choose a predefined template from the list and click OK.
 - c** Edit the existing description if desired, or type a description of the plan.
 - d** Select Suppress Calendar to populate the check box if you do not want these activities added to your calendar view.
 - e** Clear Recurring if the activity should be not be written to the campaign record for every occurrence of the campaign or program.

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

Using the Campaign or Program Explorer

Use the Campaign or Program Explorer views to monitor concurrent marketing programs and campaigns.

The Program Explorer view uses a tree pane to display the structure of the program plan, campaign plan, stage plan, and campaigns, with details of the selected object displayed at right. Expand the folders in the tree pane to display additional details. Campaigns Explorer offers similar functionality.

Click name hyperlinks in the component's list to navigate to detail screens.

To use the Explorer view

- 1** From the application-level menu, choose View > Site Map > Campaigns or Programs screen.
- 2** From the Show drop-down list, choose Explorer.

A split view appears, with a tree list of program or campaign components in the left pane, and details of the selected component in the right pane.
- 3** To navigate to the program or campaign component, click the component name in the tree pane and drill down on the component's name in the tabbed list.

Associating Documents with Programs and Campaigns

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

To attach documents to programs and campaigns

- 1** From the application-level menu, choose View > Site Map > Campaigns or Programs screen.
- 2** In the My Program Plans or My Campaign Plans list, select the program or campaign and click the Documents view tab.
- 3** In the Documents list, create a new record.
- 4** In the Attachment Name field, click the select button.
- 5** In the Add Attachment dialog box click Browse to locate the file, or type a URL.
- 6** In the Add Attachment dialog box, click Add.
- 7** In the Comments field, add information that identifies the file's contents.
- 8** Select the Update File check box to set this preference if you want changes to the original file to be included in the attached file.

To access the attached document

- In the Documents list, drill down on the Name hyperlink to view document details.

The program snapshot is a temporary binary file containing the customer-level data elements for a marketing program stage. Data in a snapshot file is extracted based on the elements needed for the segment criteria, output list fields, source code format and campaign load mapping that is associated with the stage. This information is extracted once, allowing the Marketing server to populate segments with counts and launch a campaign, without having to return to the original data sources to obtain additional information. After generating a snapshot file, you can modify segment criteria (if you do not introduce new elements) and regenerate the gross and net counts without having to requery the data sources and rebuild the result set.

A snapshot is similar to a logical spreadsheet in which the rows (for example, contacts) are determined by the filter that is applied and columns are determined by a union of segment criteria, output file layouts, source code formats and campaign load mapping fields. Filters are applied to the data before the snapshot file is built. Therefore, changing the filter criteria requires that you generate a new snapshot because new rows may need to be added.

The Marketing Server uses a snapshot to determine which customers qualify for each segment and deduplicate any overlapping customers between segments. For example, if your criteria include measures based on income, you might create low, medium and high buckets for ranges of income. The snapshot will contain a list of contacts that satisfy each segment's criteria, indicating the bucket for which each contact qualifies.

When you allocate segments to a campaign offer, Siebel Marketing counts the contacts that meet the criteria and displays the totals to help you allocate segment counts to offers. In the example, if you anticipated mailing an offer to 50,000 contacts in the high income segment and the snapshot shows that only 20,000 contacts qualify in the high bucket, you might want to adjust the salary ranges in the segment criteria and then update the counts.

The following list contains general guidelines for generating and using snapshot files:

- If the data in the data sources change, the updated data is not reflected in the snapshot unless you regenerate the snapshot.
- Changing segment or output file layouts definitions does not require snapshot regeneration if the information was captured in the original snapshot.
- A snapshot file is associated with a program stage and cannot be shared across different stages without additional onsite configuration.
- Use filters to help keep snapshot files as small as possible.
- Applying a constraint to a table can also limit data. A constraint (SQL expression) creates a restricted view of the table. If you add a constraint to the table record, it is applied every time the table is accessed. For more information, see the constraint description in [“To map a table” on page 82](#).

To generate and maintain snapshot files, perform the following tasks:

- [Generating a Snapshot File on page 435](#)
- [Stopping a Snapshot File Generation on page 439](#)
- [Modifying the Contents of a Snapshot File on page 441](#)
- [Deleting a Snapshot File on page 443](#)

Generating a Snapshot File

In Siebel Marketing, the first time you generate a snapshot or the first time data retrieval occurs, the following snapshot directories are created:

- \\filesystem\marketing\snapshots.
- \\filesystem\marketing\EAI.
- \\filesystem\marketing\Lists.

The first time you generate a snapshot file for a stage, a temporary snapshot file is created in the \\filesystem\marketing\snapshots directory. Each time you regenerate a snapshot for that stage, the data in that stage's snapshot file is overwritten. Snapshot files for all stages accumulate in the snapshots directory and can be deleted, if necessary.

When you generate a snapshot, any constraint on that table is applied, then filters, and then segment criteria. Snapshot files contain the information needed to bring in contact data from an external data source. Therefore, they are only created when you request a snapshot for a campaign that contains a segment. If you only want data that exists in an internal list, no snapshot file is needed and none is created. In addition, because there is no segment, you do not need to allocate segment counts to campaign offers. Generating a snapshot for a stage that has a list and no segment creates a campaign but no snapshot file. For example, when you generate a snapshot for a program that contains a single stage, a single list, and a single campaign, the following occurs:

- If this is the first time you have generated a snapshot, no snapshot directory is created.
- No snapshot file is created.
- No component request is submitted.
- A campaign is created.

A snapshot file can be generated automatically during the launch of a scheduled program or requested manually in the Program Flow workspace or using menus in the Program Explorer.

To generate and maintain a snapshot file, perform the following tasks:

- [Generating a Snapshot File Automatically](#)
- [Generating a Snapshot File Manually](#)
- [Checking the Status of a Snapshot Task on page 437](#)
- [Troubleshooting a Failed Snapshot Task on page 438](#)

Generating a Snapshot File Automatically

An automatic snapshot build occurs during the launch of a scheduled program. When a program is scheduled, the Program Execution workflow process initiates the stage, snapshot generation, list generation (load campaign), and campaign launch. For more information on automatic snapshot generation, see [“Using the Schedule Calendar View” on page 511](#). For more information about workflow processes and the Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Generating a Snapshot File Manually

Make sure that required tasks are complete for the stage including, specifying the output file layout, source code format, and campaign load mappings, adding the segments, and adding the campaign.

To manually generate a snapshot

- 1** From the application-level menu, choose View > Site Map > Programs screen.
- 2** In the Program Plans list, select the program plan.
- 3** Click the Program Flow view tab.
- 4** In the Program Flow workspace, select the Stage object, right-click, and choose Generate Snapshot from the menu.
- 5** In the Manual Execution - Generate Snapshot dialog box, click OK.

This dialog box will contain no records.
- 6** In the Submit Start Date field, change the submit date, if desired, and click Submit.

Checking the Status of a Snapshot Task

Generating a snapshot starts a snapshot task. You use the Server Administration screen and views to check for task completion or to view error messages using the Task Information Log if the server task fails. For more information, see [“Troubleshooting a Failed Snapshot Task” on page 438](#).

To check the status of a snapshot task, you need to know the stage plan name. To obtain the stage plan name, navigate to the Programs screen and then click the Program Flow or the Stages view tab).

To check the status of a snapshot task

- 1 From the application-level menu, choose View > Site Map > Server Administration > Components.
- 2 In the Server Components list, select the Marketing Server component.
- 3 In the Component Tasks list, check the values in the fields shown in the following table:

Field Name	Description
Task	Task number identifier.
Task State	Running. The task is in progress. Completed. The server job is done. Exited. An error was encountered.
Status	If the task is running or has completed, the stage name appears. For example, Siebel."Customers"."City" If the task has exited, you will see a message (for example, SME-00045: Task failed). To identify the stage and obtain details, see the task information log.
Start Time/ End Time	Automatically populated with the date and time the task was started and completed.

- 4 To review the Task Info Log, in the Component Tasks list, drill down on the task number hyperlink in the Task field.

The Tasks list contains a summary of the task activity. The Task Information Log list displays the events associated with that task. The first record contains the stage name in the following format:

Task Name: [stage name]

Troubleshooting a Failed Snapshot Task

The the Task Information Log file for snapshot generation can be found in the Siebel Server log directory. Check the log file named MktgSrvr_XXX.log in siebsrvr\log to review error messages.

For the Marketing Server, the default log level for the event of type General Events is 3. Log level 3 is a good level for all components. You can change the level of detail in the log file (trace) before starting a snapshot task by changing the log level. To change the log detail level, use the Server Administration screen's Components view. In the Component Event Configuration subview, locate Marketing Server in the Server Components list and set the log level for General Events to a number greater than one.

Stopping a Snapshot File Generation

You might need to stop a snapshot after you submit the generation request. For example, while checking the status of a snapshot task, you notice that the extract is accessing the incorrect table. You can stop a snapshot generation in the following ways:

- **Stopping a snapshot in Pending status.** Use this method if the status of the snapshot is Pending. To stop the snapshot in the Programs screen, you need to know the stage name. This cancels the snapshot process.
- **Stopping a snapshot in Active status.** Use this method if the status of the snapshot is Active. To stop the snapshot task on the Marketing Server, you need to know the Siebel Server name and the start time for the snapshot task. This shuts down the Marketing Server task.

To stop a snapshot task that is in Pending status

- 1** From the application-level menu, choose View > Site Map > Programs > My Programs.
- 2** Click the Status view tab.
- 3** If the status is Pending, in the Status list, drill down on the stage in the Name field.
- 4** In the Stages list, select the stage for which the snapshot is generating and click Stop.

This cancels the snapshot.

To stop a snapshot task that is in Active status

- 1** From the application-level menu, choose View > Site Map > Server Administration > Servers.
- 2** In the Servers list, select your Siebel Server and click the Server Tasks view tab.

- 3** In the Server Tasks list, select the Marketing Server task for the snapshot you want to stop.

TIP: The stage name is in the Status field and the start time is in the Start Time field.

- 4** In the Server Tasks list, click the menu button and choose Stop Task.

This shuts down the selected Marketing Server task. If you regenerate this snapshot, a new task ID will be assigned.

Modifying the Contents of a Snapshot File

Each program stage has its own snapshot. You view the data elements of the stage's snapshot in the Snapshot Contents view tab. The Snapshot Contents list provides the details of each data element in the snapshot. These include measures, buckets, attribute hierarchy and level, and fields that you specify for inclusion using segment criteria, output file layouts, and so on.

Advanced users might need to add or change snapshot contents. You can modify snapshot contents in the following ways:

- [Adding Data Elements to a Snapshot File](#)
- [Modifying the Stage Plan Details of a Snapshot File on page 442](#)

Adding Data Elements to a Snapshot File

You can add data elements such as measures to perform calculations that are not included in the segment or to extract information that may be needed later.

NOTE: You must define levels for all attributes and buckets that you use in your snapshot prior to generating it, even if all of the attribute levels are not used in the specific snapshot. If you do not define all these levels, you might experience various errors.

The time it takes to generate a snapshot depends on the number of specified data elements being extracted from the database. Therefore, you should carefully consider which elements you add to the snapshot list. Add elements only when the probability is high that inclusion of the extra information will boost counts and when adding elements avoids your having to generate the snapshot.

To add data elements to a snapshot

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Program Plans list, select the program and click the Stages view tab.
- 3** In the Stages list, drill down on the Stage Plan Name hyperlink.

- 4** Click the Snapshot Contents view tab and review the Snapshot Contents list.
- 5** Add records to a snapshot.
 - a** Create a new record.
 - b** In the new record, click the appropriate select buttons for Measure, Bucket, Hierarchy Level, or Field.
 - c** In the Pick dialog box, select the element from the list and click OK.

A check mark appears in the User Added field.

Modifying the Stage Plan Details of a Snapshot File

If you alter the definition of segments, output file layouts, source code format, or campaign load mapping, clicking Refresh updates the snapshot contents. If you add or delete filters, segments, output file layouts, or table constraints, you need to generate a new snapshot from the Program Flow workspace. The Snapshot Contents list refreshes automatically.

To modify the stage plan details of a snapshot

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Program Plans list, select the program and click the Stages view tab.
- 3** In the Stages list, drill down on the Stage Plan Name hyperlink.
- 4** In the Stage Plan Details form, complete the necessary fields such as Source Code Format and Campaign Load Mapping.
- 5** Click the Snapshot Contents view tab and review the Snapshot Contents list.
- 6** If the changes do not appear, click Refresh.

Deleting a Snapshot File

If you have to create more space on your file server, you might be able to delete old snapshot files. If there are no processes (for example, Load Campaign, Preview List or Update Counts) planned for the future or actively running against a snapshot file, you may delete it. Other than tasks such as these, which rely on information contained within a snapshot, snapshot files do not have dependencies on other processes or object definitions (such as Attribute or Measure definitions).

After you delete a snapshot file, attempting to run any task associated with that snapshot will cause the task to exit (fail). For example, if you delete a snapshot file for a campaign and then try to update the counts for that campaign, the Update Counts task will exit and log an error.

If this occurs, you should verify that the snapshot file exists. If it does not exist, regenerate the snapshot file and then process the tasks. If you accidentally delete a file that you need to use, you can recreate the snapshot by running the Generate Snapshot task again.

Use the following best practices to determine if you can delete a snapshot file:

- Delete a snapshot file only when no campaigns are being loaded. This will make sure that you do not cause campaign load errors by deleting a snapshot against which a campaign load is actively running.
- Verify that there are no other processes (for example, Update Counts or Preview List) currently running against the snapshot file you want to delete.
- Determine if any processes will require this snapshot file in the near future.
- You might want to use the age of the snapshot file to determine if it can be deleted. For example, you could delete snapshots that were generated more than thirty days ago.

To delete a snapshot file

- 1 Navigate to the snapshot directory in your Siebel File System.

Deleting a Snapshot File

- 2 Delete the files according to the guidelines in this section. By default, the snapshots directory is `\\[siebelfilesystem]\marketing\snapshots`.

In the directory path, [siebelfilesystem] represents your Siebel File System directory name.

Allocating Segment Counts to Campaigns

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After you generate a snapshot, you can use the Allocation view to assign segment counts to specific campaigns. You can assign members of one segment to many campaigns, or members of many segments to one campaign.

Siebel Marketing allows some flexibility in allocating segment net counts to campaigns. If you generate counts by manually starting a snapshot from the Program Flow view, you can manually allocate the counts by adding values for Allocation and % Allocation fields in the Allocation form. You use Forecast Allocation if your program is set for automatic execution using Schedule. Forecast mode allocation is performed as part of the Program Execution workflow process. You use forecast allocation for automatic execution because once the snapshot is generated as part of the workflow process, you cannot change manual allocation numbers before list generation begins.

Deduplication of contacts is automatically handled during snapshot generation, making sure that contacts meeting criteria for more than one segment will not receive more than one offer in the same program stage.

If you have multiple segments, you can set the priority for each segment in the Allocation views. Duplicate contacts are then removed from the lower priority segments. Setting segment priority can be performed before a snapshot is generated, or following the snapshot generation. As a default, if you have more than one segment, each segment's priority is set to 1. If you set the priority for each segment before snapshot generation, then no additional action is necessary. If you have more than one segment and change the priority of each segment after snapshot generation, you must refresh the displayed counts using the Update Counts functionality.

If you manually generate a snapshot and segment counts are available, the Allocation view allows you to distribute segments to campaigns in a number of ways:

- Allocating a specific percentage of the count for each campaign.
- Allocating an even percent of the count across all campaigns.
- Allocating the counts with a specific percent for one or more campaigns and distributing an even percentage of the remainder across the unallocated campaigns.
- Allocation by priority.

For example, during basic allocation, you can allocate 50 percent of the contacts in Segment A to receive Campaign 1, and 50 percent of the contacts in Segment A to receive Campaign 2.

Using the campaign Waves and List Distribution views, segment counts can be allocated to a campaign with several vendors handling the distribution. For more information about campaign waves and vendors, see [“Creating Vendor-Specific Lists” on page 458](#).

The marketing server allocates based on specified percentages. If these numbers are not integers, the count for allocation is rounded down and the remaining members are distributed to the campaigns. The Allocation view, however, displays the rounded-down count.

If a snapshot will be generated during automatic program execution, Forecast Allocation allows you to specify the percentage of contacts anticipated for each campaign, and, if desired, the maximum count allowed for each campaign in the absence of any real data.

These percentage counts can then be used when determining vendor-specific distribution lists. Forecasting is most often used when designing follow-up stages to a program.

NOTE: Switching from basic allocation with counts to Forecast Allocation clears previous counts and percentages.

Before allocating segments to campaigns, you must perform the following tasks using the Program Flow and All Campaign Plans or My Campaign Plans views:

- Define each campaign plan.
- Assign segments to a program stage.
- Assign campaigns to the segment.
- Generate a snapshot (unless program execution is scheduled).

NOTE: In the Program Flow view, if you associate a campaign to a segment and then add another campaign, the second campaign is linked directly to the stage on the Program Flow workspace, until you complete allocation.

Using the Allocation View

Allocation controls are accessible from the Stage Details view. Clicking the Allocation view tab displays the list of segments associated with the marketing program and the Allocation Detail list, which displays campaigns associated with the program. The active program is identified in the thread bar. To change the program and associated stage, choose All Program Plans or My Program Plans from the Show drop-down list.

- **Stage Detail.** This editable form provides the details of the stage associated with the program and identifies key components such as the source code format, output file layout, campaign load mapping, filters, and so on. If you modify stage details in this form, make sure you save your changes.
- **Allocation and Segments.** This list displays segments associated with the program. For segment details, click the segment name link to open the Edit Segment view.
- **Allocation Details.** This list displays campaigns assigned to the program stage. Type a percentage in the % Allocation field, and save the record to automatically populate the Total Count and Allocation fields with counts for the campaign.

Allocating a Segment to a Campaign

Use the following procedure to allocate segment counts among campaigns when a snapshot has been generated.

To allocate a segment to a campaign

- 1** From the application-level menu, choose View > Site Map > Programs screen.
- 2** In the Program Plans list, select the program targeted for allocation and click the Stages view tab.
- 3** In the Stages list, click the Stage Plan Name hyperlink.

- 4 In the Stage Plan Details form, complete the fields. Save the record to commit your changes.

If you plan to schedule your program for automatic execution, you will need to use Forecast Allocation. Select the Forecast Mode check box to enable Forecast Allocation fields in the Allocation Details list. Selection of Forecast Mode disables the Allocation and %Allocation fields. For more information, see [“Forecasting Allocation” on page 451](#).

NOTE: When you use Forecast Mode for allocation, the allocation counts do not update on the allocation screen. They remain at zero.

- 5 In the Allocation list of segments, adjust the numbers in the priority field to set the priority for each segment used in the program. To view details of a segment, drill down on the segment name link to open the Edit Segment view.

A contact can qualify for more than one segment. If your program contains multiple segments, set a priority number, with 1 being the highest, to make sure that a contact that qualifies for every segment is counted in the one with the highest priority. If every segment has the same priority number, counts are proportionally distributed between the segments.

If you change the priority of a segment, click the menu button in the Stages form, and choose Update Counts to recalculate Net Count. When this process is complete, the gross and net counts are updated according to the new priorities.

- **Gross (count).** The Gross column indicates how many contacts qualify for each segment. A contact may qualify for multiple segments (for example, “Gold Customers,” “Longevity 16-19,” and “All Customers”) but Siebel Marketing assigns it to only one segment.
- **Net.** The Net count shows the number of contacts Siebel Marketing assigned to each segment, based on the segment’s priority (deduplication). Siebel Marketing does not allow you to allocate more contacts for a segment than that value. For example, if the Net column shows 24,980 contacts for a segment, the contacts for campaigns assigned to that segment cannot exceed that value (unless you raise the priority of the segment and recalculate counts).

If the Gross and Net columns do not have numbers in them, you must recalculate the counts by clicking Update Counts. Before doing so, prioritize the segments. For more information see [Updating Counts and Clear Allocation Functions on page 453](#).

6 The Allocation and Allocation Details lists display segments and campaigns associated with the stage. Select a segment, and then a campaign to allocate Net Counts from the segment to the campaign. Use *one* of the following methods:

- In the % Allocation field, type the percentage of counts allocated to each campaign. The Total Count and Allocation fields are automatically updated with contact numbers when you save the record.
- Type a number in the Allocation field.

The Total Count and % Allocation numbers automatically update when you save the record.

Using Other Allocation Methods

You can also allocate segments in two other ways.

To allocate segments

- **Even % for All Campaigns.** In the Allocation list of segments, click the menu button and choose this option to distribute the net counts from the selected segment evenly across each campaign in the stage.
- **Even % for Unallocated Campaigns.** In the Allocation list of segments, click the menu button and choose this option to evenly distribute any unallocated net counts from the selected segment to campaigns that have not received counts.

Forecasting Allocation

Forecast Allocation is used when the program is scheduled for automatic execution using the Program Execution workflow process.

Switching to Forecast mode after traditional allocation counts have been returned clears those counts from the view. To return to basic allocation, clear the Forecast Mode check box in the Stage Detail form.

Forecast mode provides two controls for determining the number of contacts for each segment-campaign combination: Forecast Allocation and Forecast % Allocation.

- Use the Forecast % Allocation field to distribute a percentage of a segment's count to a campaign.

For example, you might want 75% of a segment count to receive one campaign and the remaining 25% to receive a different campaign.

In handling the response to a previous stage, you might create two segments: one for contacts who responded to the campaign, and one for contacts who did not respond. If you have two campaigns, a Welcome campaign for those who respond, and a campaign with a better offer for those who do not, you might allocate 100% of the responders for the Welcome campaign (0% of that segment would get the better offer). Then, you might set up 100% of those who do not respond to get the better campaign offer (0% of this group would get the Welcome campaign).

- Use the Forecast Allocation (Max) field to set a limit on the quantity of contacts for each segment-campaign combination. For example, if you want a mailing of 500,000 for one campaign, you might split that quantity between three segments.

- Combine the Forecast % and Forecast Allocation controls to specify an allocation percentage not to exceed a predetermined number. Siebel Marketing allocates based on the smaller number between a forecasted count and a % allocation.

For example, you can specify a Forecast % allocation of 80%, with a maximum Forecast Allocation of 280,000. When the snapshot for that stage is generated, Siebel Marketing determines how many counts should be in each segment. For example, if the segment has 500,000, then 80% of that is 400,000, which is larger than the capped Forecast Allocation of 280,000. Siebel Marketing would allocate 280,000 contacts to the segment-campaign combination.

If the segment had 300,000 contacts, 80% of that is 240,000, which is less than the capped Forecast Allocation value. Siebel Marketing would allocate 240,000 contacts to the segment-campaign combination.

Using Forecast Mode

The following procedure describes how to use Forecast Mode for allocation.

To use Forecast Mode

- 1** From the application-level menu, choose View > Site Map > Programs screen.
- 2** In the Programs list, select the program targeted for allocation and click the Stages view tab.
- 3** In the Stages list, drill down on the Stage record hyperlink.
- 4** In the Stage Plan Details form, select the Forecast Mode box and save the record.
- 5** In the Allocation segments list, prioritize the segments associated with the program stage.

To change the priority of a segment, change the value in the Priority field.
- 6** In the Segments list, select a segment and select a campaign in the Allocation Details list.
- 7** In the Allocation Details list, type a Forecast Allocation, or a Forecast % Allocation, or both, depending on your allocation strategy.

To use only the Forecast Allocation, or the Forecast % Allocation, type a value in one of the fields and leave the other blank.

Repeat [Step 6](#) through [Step 7](#), selecting additional segments and campaigns and adding the forecast allocation.

When the snapshot is generated, the Gross and Net Counts fields are populated in the Segments list. The Gross count is the total count of those who met the segment criteria. The Net Count is the count after deduplication has been performed.

Updating Counts and Clear Allocation Functions

If you change the priority of a segment, change a segment definition in a way that does not affect the snapshot definition, or use a different allocation method, refresh the displayed counts. To refresh the counts, in the Stage Detail form, click the menu button and choose Update Counts.

To remove displayed allocation counts in the Allocation Details list, first select a segment and a campaign. Then, click the menu button in the Allocation Details list and choose Clear Allocation. Each allocation of a segment's counts to a campaign must be cleared individually.

Allocating Segment Counts to Campaigns

Forecasting Allocation

If your marketing program consists of a one-time campaign and offer, and you are reasonably sure of the response, you probably do not need to define multiple waves. Siebel Marketing automatically provides a 100 percent fully allocated wave (with a wave code of A and a lag of 0) when a campaign is created.

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

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

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

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

Waves can be used only with campaigns that are launched through Siebel Marketing. Typically, these are email campaigns or campaigns that send a list to an outside vendor. Wave functionality does not apply to campaigns processed internally such as those through Siebel Call Center or Siebel Sales.

Setting Up Waves

Use the Campaigns screen's Waves view tab to define distribution waves or time periods for the specified campaign. You can use the List Distribution list to specify a percentage of contacts in each wave that will be sent to each vendor, as well as the output file layout and the method for distributing the list.

Before creating a second wave, decrease the number in the % field of the first wave, which, by default, is 100%. The percent number for all waves cannot exceed 100.

To set up multiple waves

- 1 From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2 In the Campaign Plans list, select the campaign.
- 3 Click the Waves view tab.
- 4 In the Waves list, create a new record.
- 5 Complete the necessary fields, using [Table 69](#) as a guide and save the wave record.

Table 69. Fields in the Campaign Waves Form

Field	Comment
%	The default percent is 100 for a single wave. If you are planning multiple waves, first reduce the percentage number in the first wave and type the percentage of contacts that will be included in the second wave. The total percent for all waves cannot exceed 100%.
Count	This field shows the corresponding number of contacts to be included in the wave. The number in this field is automatically calculated when you save the record. It is possible for the displayed count to be one less than the actual count in the wave, due to rounding functionality.
Description	Describe the characteristics of the wave.

Table 69. Fields in the Campaign Waves Form

Field	Comment
Lag (Days)	<p>The default is 0. Type the number of days the wave is delayed after loading a campaign. The maximum lag for all the waves cannot be greater than number of days between the start date and end date of the campaign.</p> <p>The wave is launched when the server processes the Load Campaign request.</p> <p>This server process can be automatic, using a scheduled program launch or can be manually started using the right-click menu in the Program Flow workspace.</p>
Wave Code	<p>Type a wave code, up to 10 characters. You cannot save the record without a wave code. The wave code appears as part of your program's source code if you have set up the source code format to include it. The wave code for the default wave is A.</p>

Creating Vendor-Specific Lists

In addition to splitting target contacts in your distribution list by wave, you can also split the contacts in each wave by vendor.

Before you set up vendor distribution, make sure you have defined an output file layout, vendor profiles, and distribution method profiles (if you are using email or FTP to deliver the list to the vendor). The output file layout must be specified in the Stage Details form. For more information, see [“Working With Output File Layouts” on page 170](#), [“Defining Distribution Profiles for Vendors” on page 180](#), and [“Using Delivery Profiles - Email, eNewsletter, and Fax” on page 277](#).

For example, you create three waves for a selected campaign. You set up the list for the first wave, with a count of 500,000 (50 percent of the total), to be split equally between two vendors (each with approximately 250,000 names). If each wave’s contacts is split between two vendors, a total of six lists will be generated.

You can also split the distribution list by list measures. To be used, List measures must be included in the snapshot.

If you are splitting by list measures, Siebel Marketing creates a separate file for each unique value that it finds. For example, if you select CUSTOMER_STATE as the list measure, Siebel Marketing creates a separate file for each state it finds.

To set up vendor-specific lists

- 1** From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2** In the Campaign Plans list, select the campaign and click the Waves view tab.
- 3** In the Waves list, select the wave.
- 4** In the List Distribution list, create a new record.

- 5 Complete the necessary fields for each vendor, using [Table 70](#) as a guide, and save the record.

Table 70. Fields, List Distribution Form

Field	Comment
%	Type the percentage of contacts that will be distributed to this vendor.
Distribution Method	This read-only field displays the defined distribution method associated with the vendor. For more information on defining distribution methods, see “Setting Up Vendor Profiles” on page 177 .
File Format	Choose the File Format from the list. The options are ASCII-Comma Separated, ASCII-Fixed Length, and EBCDIC-Fixed Length. EBCDIC stands for Extended Binary Coded Decimal Interchange Code. This standard code uses 8 bits to represent each of up to 256 alphanumeric characters.
Header	This check box sets the header flag for the output list. If the flag for a header was set in the Output File Layouts view, this column contains a check mark. A header includes the following information in the following order: <ul style="list-style-type: none"> ■ Stage name. ■ Campaign source code. ■ Vendor name. ■ Wave source code. ■ List format ID. ■ Location of the output list (path and timestamp). ■ Record length (the sum of the width of the components in the output file layout). ■ Column headers.
Output File Layout	Choose the output file layout from the list. To be available for selection, the output file layout must be associated with the program stage that the campaign references.
Measure Name	If you are splitting the list by a measure, click the Measure name select button. In the Measures dialog box, choose the measure from the list and click OK. The measure must be included in the output file layout associated with the stage.

Table 70. Fields, List Distribution Form

Field	Comment
Seed Flag	<p>The Seed Flag (that indicates whether a seed list will be automatically merged with the distribution list) is set to No as a default, until the output file layout is selected. The seed list is associated with the generated list in the Output File Layouts view in the Marketing Administration screen.</p> <p>If you did not associate a seed list with the list in the Output File Layout view, the field value will remain as No.</p> <p>If a seed list is associated with the Output File Layout, and the seed flag is not selected, the seeds will not be added to the generated list.</p>
Vendor	<p>Choose the vendor from the list of predefined vendors. For more information on setting up a vendor profile, see “Setting Up Vendor Profiles” on page 177.</p>

Previewing and Generating Lists 19

After a snapshot is generated, you can preview a sample of the list to determine if the output file layout is what you want, and then generate the actual distribution list that will be sent to vendors.

NOTE: If your program stage does not include any segments, Preview List will not work. When you generate a snapshot, a snapshot file is only created if a campaign contains a segment. When a campaign has a list (and no segment) in the program flow, generating a snapshot creates a campaign and no snapshot file. For more information, see [“Generating a Snapshot File” on page 435](#).

Lists generated from your snapshot data contain names, addresses, and other information about individuals who will receive a particular campaign offer. After a list has been generated, the records in it will not change even when the contacts and prospects who meet the segmentation criteria change.

Lists can be generated manually using a Program Flow workspace menu command (Load Campaign) or automatically scheduled as part of a program launch using the Schedule view. When you load a campaign, Siebel Marketing generates vendor and eAI list files, and associates imported lists of contacts and prospects with the campaign. The eAI list files are used to populate the campaign table S_CAMP_CON in the Marketing Repository. S_CAMP_CON contains the history of who was contacted in which campaign.

NOTE: Because lists are based on the content of the snapshot file, changes made to the campaign contacts and prospects after the campaign is loaded will not be reflected in any output lists.

For more information on mapping to external data sources (eAI files), see [Chapter 4, “External Data Mapping.”](#)

Previewing a List

Use the procedure that follows to create a sample list that you can preview. The sample includes a maximum of 500 records and a proportional number of seeds. A sample list contains the following information:

- The identifier (name) of the preview file that is saved in the file system directory.
- Example: P-31L200B 0001, P is the prefix for a previewed list.
- The wave code identifies the wave that has a generated list associated with it.
- The vendor assigned to receive the generated list.
- The list format assigned to the campaign list.
- The split value, if the list has been split by a measure.
- The last time list values were modified.

Before you can preview a list, you must specify a vendor for list distribution using the Campaigns screen's Waves view tab, and the List Distribution list. If Siebel Call Center is the list recipient, rather than a vendor, Preview List is unavailable.

CAUTION: If the RequestServer parameter is not configured correctly in the client.cfg file, an error occurs and you will see the following error message: *Internal: Communication protocol error while instantiating new task.*

To preview a list

- 1 From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2 In the Program Plans list, select the Program, and click the Stages view tab.
- 3 In the Stages list, drill down on the appropriate Stage Plan Name hyperlink.
- 4 Click the Preview List view tab.
- 5 In the Preview List list, select the campaign list record.

- 6 Scroll down to the Output Lists list and click Preview Sample.

The Siebel Marketing Server extracts a sample of the list, and applies the list format. A record displays in the Output Lists list when the list preview is generated. However, you must refresh the view before the record displays. To refresh the view, leave the view and then return to it.

NOTE: If you generate the preview list again, the previous preview record will be replaced by a new record.

- 7 In the Output Lists list, click the Name hyperlink.

A window appears containing columns headed by elements included in the list format, and corresponding data related to the contact.

Waves, Distribution Lists, and List Previews

When you set up campaign waves, you first define a wave. Then, if the wave involves providing a list of contacts to a vendor, you provide the vendor information for each wave in the List Distribution list.

If you do not specify a vendor for a wave, Siebel Marketing assumes you want to launch the campaign through the Siebel Campaign Execution Channel (Call Center, email, and so on) and does not generate a Preview List of contacts from that wave.

For example, your campaign has 420 contacts that will receive the offer in two distribution waves. Wave A will distribute the offer to 50 percent (210) of the contacts, and Wave B will distribute the offer to the remaining 50 percent (210).

However, a vendor has only been identified in the List Distribution list for Wave B. When you request a List Preview, the List Preview window displays a preview of the list of 210 contacts that will be sent for Wave B.

Previewing Lists That Will be Split by Measure

If you have defined a list distribution that will be split by a measure, Preview Lists will provide a sample of each split list. The Export Lists view also displays the split value. For more information on splitting a list by measure, see [“Working With Output File Layouts” on page 170](#).

Manually Loading a Campaign (Generating a List)

The following procedure explains how to manually generate a list from the Program Flow view. When you manually load a campaign, the scheduled task will not appear in the program's Schedule calendar view. For more information, see [“Using the Schedule Calendar View” on page 511](#).

For information about loading a campaign (generating a list) automatically, see [Chapter 21, “Launching Programs and Campaigns.”](#)

To generate a list

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Program Plans list, select the program.
- 3** Click the Program Flow view tab.

The Program Flow workspace appears, containing stage, segment, and campaign objects.

- 4** In the Program Flow workspace, select the campaign plan object, right-click, and choose Load Campaign from the menu.
- 5** In the Manual Execution - Load Campaign dialog box, select the campaign name. If there are no campaign names, click Submit.

Loading a campaign plan creates the campaign record and links it to the selected stage occurrence.

NOTE: To generate the list at a later time, adjust the displayed date and time in the Manual Execution - Load Campaign dialog box.

- 6** Click Submit to queue the server task.

To check the status of the server task

1 From the application-level menu, choose View > Site Map > Server Administration > Components.

2 Locate the Marketing Server task state.

The task state should be running, and the status field should contain the stage identifier and Counter List.

3 When list generation completes, the status field should read Completed.

Understanding the Load Campaign Workflow Process

Siebel Business Process Designer shows the process flow. In the Business Process Administration screen, select the Campaign Load workflow process and click the Process Designer view tab.

When you manually load a campaign, or as part of an automatic program execution, the following events occur:

- A campaign record is created and associated information such as offers, teams, organizations, expenses, and so on is copied from the campaign plan. If an error occurs during the campaign load process, the status field for the campaign record shows Error and the error message appears in the Status field.
- A distribution list of contacts is generated by the Siebel Marketing Server.
- Data is imported from an external data source according to the external contact mapping designed using the Campaign Load Mapping view and eAI technology.
- Internal or purchased list contacts are assigned to campaigns for internal loading.
- If the program has been launched automatically, campaign launch occurs, and the campaign record is marked as Finished.
- The Campaign Launch workflow process creates the WfProcMgr_identifier.log file containing detailed information about the CommOutboundMgr requests submitted for vendor lists and offers to campaign recipients. Each submitted request includes a SRM ID and a description.

For more information on workflow processes and the Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Viewing Exported Lists

Use the Exported Lists view to display lists generated for vendors by campaign.

The Exported List view provides the name of the exported list file, the number of records in the list, the designated distribution wave, the vendor receiving the list, the list format, seed count (if seeds have been included), and the list split by measure value. The exported list file is located in the \\filesystem\Marketing\Lists directory.

To view exported lists

- 1** From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2** In the Campaign Plans list, select a campaign plan and click the Status view tab.
- 3** In the Status list, locate a campaign and drill down on the campaign name.
- 4** Click the Exported Lists view tab.
- 5** In the Exported Lists list, you can display other views using the following steps:
 - a** To display the Vendors view with details, drill down on the Vendor name.
 - b** To display the Output File Layout view with details, drill down on the List Format name.

List Management 20

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

NOTE: The Siebel Campaigns module can be added to any base application, including Siebel Sales, Siebel Call Center, Siebel PRM.

List Management allows you to create and manage lists of contacts and prospects within Siebel applications for use in marketing campaigns. A list in Siebel Marketing is a grouping of contact or prospect records in the Siebel database.

Contacts are customers already in the Siebel database. Prospects are potential customers that have yet to be screened, qualified, and promoted to contacts. By using this distinction, List Management allows you to eliminate prospects that do not qualify for promotion to contacts.

For example, you rent a magazine subscriber list containing 1,000 names and addresses. You want to contact these people, but because the list is rented, you may not add the records into your Siebel database as contacts unless they become customers generating revenue. You must be able to remove the names from your database when you return the list. Siebel List Management allows you to identify these names and addresses as prospects until they can be promoted to contacts. For information about promoting prospects to contacts, see *Siebel Call Center User Guide*.

To create, manage and maintain lists, perform the following tasks:

- [“Importing and Managing External Lists” on page 469](#). List Management allows you to import any external file of customer names and their associated contact and profile information.

- [“Creating and Managing Internal Lists” on page 485](#). You can use List Management to create and maintain lists created from records that already exist in your Siebel database.
- [“Promoting Prospects” on page 490](#).
- [“Viewing and Maintaining Lists” on page 495](#).
- [“Integrating List Management with D&B” on page 499](#). For customers who have licensed Siebel Dun & Bradstreet Integration Solution for Siebel Sales or another Siebel application, List Management allows you to use lists of prospects generated from the D&B source data in marketing campaigns.

Importing and Managing External Lists

External lists are created by importing an external file into your Siebel application using the List Import utility. Imported lists can come from any source, as long as the list can be saved in one of the supported file formats, including Comma Separated, Tab Delimited, and Fixed Width. Common examples of list sources include rented or purchased lists from marketing bureaus, registration lists from trade shows or events, or output lists from other applications.

When you integrate Siebel Marketing or Siebel Campaigns with Siebel Data Quality (optional module), incoming records can be cleansed and matched against all existing contacts and prospects in the database. This helps prevent creation of duplicate records for incoming prospects that are already contacts.

For information about Siebel Data Quality, see *Siebel Data Quality Administration Guide*.

To import and manage external lists, perform the following tasks:

- [Prerequisites for Importing External Lists](#)
- [Importing External Lists on page 472](#)
- [Launching Import Requests and Tracking the Import Status on page 476](#)
- [Importing Campaign and Response Data on page 477](#)
- [Maintaining Attributes for List Records on page 479](#)
- [Mapping Fields on page 480](#)
- [Using List Import Formats on page 481](#)
- [Editing the List Import Format Settings on page 482](#)
- [Understanding Import Status and Error Messages on page 483](#)

Prerequisites for Importing External Lists

Before importing a list, you need to perform the following tasks:

- Verify status of server components and tasks.

- Verify data quality settings
- Validating the structure of incoming data.

Verifying Status of Server Components and Tasks

Before importing a list, you need to verify that server components are enabled and that server tasks are running.

To enable server components and run tasks, you can use two views on the Server Administration screen: Components and Tasks. For more information, see the *Siebel Server Administration Guide*.

Make sure that the following server components are enabled and the following server tasks are running:

- List Import Service Manager: Enabled.

Clicking Launch Import in the List Import view tab of the List Management screen submits the import request. The actual import is performed by the List Manager server component on the Siebel Server.

- Server Request Processor: Running.
- Server Request Manager: Enabled or running.

To import a list, you must be connected to the Siebel Server. If the Siebel client cannot detect a running Siebel Server at the time you launch the import, you will receive a warning message. You can continue to submit the import request if you are sure that a Siebel Server will be available to handle the request later.

For the request to be queued, you must have a Siebel Gateway Server running in the background. The request will be routed through the gateway server to a Siebel Server which has the List Import Service Manager server component enabled. If you do not have a gateway server running, you will receive an error message saying “Unable to connect to gateway server.”

Verifying Data Quality Settings

When you use the optional Data Quality module, you should verify your settings for the following server components before importing files:

- Data Quality Manager.

- List Import Service Manager.
- The object manager for the application in which your users promote prospects. For example, if you promote prospects using Call Center, you need to enable the Call Center Object Manager.

For instructions, see [“Determining Component Group Status” on page 36](#). If you need to enable a server component, see [“Enabling and Synchronizing Component Groups” on page 37](#). For more information about data quality configuration, see *Siebel Data Quality Administration Guide*.

- 1 Verify that these server components are set to Enabled.
- 2 Verify the component parameters for these server components are set for deduplication and data cleansing.
 - If you want to enable Data Matching, use the Components view in the Server Administration screen and query for each of these server components. Click the Component Parameters view tab and query for the DeDuplication parameters. The DeDuplication Enable Flag should be set to TRUE.
 - If you want to enable Data Cleansing during import, query for the Data Cleansing parameters. The Data Cleansing Enable Flag should be set to TRUE.
- 3 Verify the matching threshold for List Import. The Match Threshold setting in the Data Quality Settings view of the Data Administration screen determines if an incoming name is considered a match with existing data. To specify a different threshold for List Import than the rest of the Data Quality module, navigate to the Components view of the Server Administration screen and select the List Import Service Manager. Click Component Parameters and query for Dedup Threshold. Set the value to the match score threshold that you want to apply to the List Import utility.

CAUTION: Reboot Siebel Server before launching any import tasks so that new parameter values take effect.

- 4 Make sure that you set the Data Quality Settings in the Data Administration screen. You should generate and refresh the match keys for the existing contact and prospect data before importing any files.

Validating the Structure of the Incoming Data

Some columns for a prospect correspond to an LOV or MLOV field in the application. Be sure that your incoming data for these columns only use values from the LOV or MLOV. Any nonmatching values will automatically be set to NULL in the new prospect record.

The date format is set by the system settings for the machine on which the Siebel Server is running. For date fields, you should make sure you use the correct date format that corresponds to the locale settings for your Siebel environment.

Importing External Lists

Lists that you import must be in text (.txt) format. When you import a list, List Management performs the following tasks:

- Loads the list names into the Prospects table as individual records.
- Allows you to set the import mode so that matches between incoming names and existing records can be handled according to your requirements.
- Allows you to save and reuse the file structure you develop during the import process by mapping the columns of the file.
- Controls the matching and address cleansing settings applied by Siebel Data Quality (optional module).

When the import is finished, the imported list and its associated contacts and prospects display in the List Contacts and Prospects form.

NOTE: Imported records remain in the EIM_PRSP_CON interface table, unless you delete them. This causes the table size to increase every time you import a list. You might need to delete these records periodically to improve performance. To delete them, use standard SQL truncate or delete commands when no list import task or EIM task for this interface table is running. For example, `DELETE FROM <table_owner>.EIM_PRSP_CON where IF_ROW_BATCH_NUM > 10000000.`

Before you can import an external list, you need to perform the following tasks:

- [Creating a Record for Importing an External List on page 473](#)

- [Selecting the List Import Mode on page 474](#)
- [Mapping External List Columns to Database Columns on page 476](#)

Creating a Record for Importing an External List

Before you import an external list, you must create a record in your Siebel application that describes the list. This record tells the list import utility what file to import.

To create a record for importing an external list

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.
- 2 In the Lists list, create a new record and complete the fields.
Some fields are described in [Table 71](#).
- 3 Save the record.

Table 71. Fields Used to Create a List Record

Field	Comments
File Type	List Import automatically determines the format of the attached text file. If you use the Other delimited option, you are limited to 1 character. If you attempt to add > 1 character, the value will be truncated. Values are: <ul style="list-style-type: none"> ■ Fixed Width ■ Comma Delimited. If the first row of data in the file contains a comma in any of the field values, it is recommended that you use tab delimited format to make sure that the correct file format is detected. ■ Tab Delimited
List Name	Required. This field is automatically generated when you add the record but you can modify the name.
List Type	Automatic. The possible values are Imported, Internal and D&B. If the file type is incorrectly detected during attachment, you can change it.
Source	The company from which the list was purchased. The company must be an account record in the Siebel database.

Selecting the List Import Mode

If you use the Siebel Data Quality optional module, you need to specify how you want duplicates handled before importing a list. If Data Quality is not enabled, new prospect records will be created for all incoming data no matter what mode you select. For more information, see *Siebel Data Quality Administration Guide*. You can choose one of the following modes:

- **Skip Incoming Duplicates Mode.** In this mode, if a match is detected by the Data Quality business service, any incoming records matching existing contacts or prospects will not be added as new records in the database. Instead, the matching record which already exists in the database will be associated with the list. Each skipped record is recorded in the List Import log file for reference.

If the incoming record matches more than one existing record, all the existing matches will be added to the list and the duplicates will be noted in the List Import log file.

- **Update Existing Duplicates Mode.** In this mode, if a match is detected by Data Quality, any incoming records can overwrite the existing match in the database. The columns that are allowed to be overwritten are set by the administrator for the List Import Format used by the file. To set which fields will be updated by an incoming record, navigate to the List Import Formats view in the List Management screen and select the Allow Field Updates check box. For reference, the List Import log file records all records that are updated as well as the old and new values for any updated fields.

If you use Update Existing Duplicates as a list import mode and an imported field value does not match any value on the bounded LOV, then the application will not change the field on the existing prospect record (the original value is preserved).

NOTE: Update Existing Duplicates Mode only updates prospect records. It will not update contact records.

- **Resolve Incoming Duplicates Mode.** In this mode, matches are detected but the incoming record is added to the database without changing or overwriting the preexisting record. This allows the administrator to resolve any matches later on a case-by-case basis or by using the Siebel Data Quality module. To resolve duplicates, you can use the Duplicate Prospect Resolution view tab in the Data Quality view of the Data Administration screen. In Resolve Mode, all matches are recorded in the List Import log file.

To select an import mode

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.
- 2 In the Lists list, select your list.
Some fields are described in [Table 72](#).
- 3 Click the List Import view tab.
- 4 In the List Import Mode drop-down list, select the import mode that you wish to apply.

For more details, see [“Selecting the List Import Mode” on page 474](#).

- 5 Save the record.

Table 72. Fields Used for List Import view

Field	Comments
Additional Actions	Assign to Campaigns, Responses, or Campaigns and Responses. Used whenever the import file contains campaign history or response data about contacts and prospects. For more information, see “Importing Campaign and Response Data” on page 477 .
Clean	A check box for which the default is off.
List Import Format	Indicates the saved column sequence for the file. Formats can be reused across lists. For more information, see “Using List Import Formats” on page 481 .
List Import Mode	For descriptions, see “Selecting the List Import Mode” on page 474 .

Mapping External List Columns to Database Columns

Every column in the file you want to import must be mapped to an existing column in the prospects table in the Siebel Database or to an attribute created for this purpose. If you import response or campaign data, you can also map to response and campaign fields. For information about mapping attributes, see [“Adding Additional Attributes to a List” on page 480](#).

CAUTION: Make sure that you map every column before launching the import.

To map list columns to database columns in the prospect table

- 1** From the application-level menu, choose View > Site Map > List Management > Lists.
- 2** In the Lists list, select your list.
- 3** Click the List Import view tab.
- 4** Scroll down to the List Import Format list and map every column to an existing database column in the prospect table or to an attribute created for this purpose.
- 5** In the List Import Format list, save the format in one of the following ways:
 - a** The first time you save a format, click Save as New.

This allows you to retain the original format and save the modified format separately. All saved formats appear in the List Management screen’s List Imports Formats view tab.
 - b** Click Save to overwrite the original format.

Use this save option if you make changes to the mappings and want to preserve them.

Launching Import Requests and Tracking the Import Status

After creating a list record, identifying the import mode, and mapping list columns to database columns, you can import the list and then track the request’s status.

To launch a list import request

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.
- 2 In the Lists list, select the list you want to import.
- 3 Click the List Import view tab.
- 4 In the List Import form, click Launch Import.

To track the status of an import request

After you submit the import request, the status field on the List Import list contains a value of In Progress. You can refresh this view to track the status of your request. When the import is finished, the status field contains a value of Successfully Completed.

NOTE: You can review the List Import task status in the Components view in the Server Administration screen. In the Component Tasks list, select tasks for the List Import Service Manager. Alternatively, you can review List Import log files stored in the Siebel file system.

Importing Campaign and Response Data

List Import can be used to import campaign and Response Data about contacts and prospects. For example, your company might run a campaign against a target list of contacts, but collect the responses in an external system or through an outside service company. You can import the response results from these sources and attribute the responses to the original campaign.

The List Import view provides the following additional actions that you can use to include response and campaign data in the file:

- **Assign to Responses.** This action will create response records for all the contacts or prospects in the list. The action will not add, delete or modify the set of contacts and prospects already associated with the campaign.
- **Assign to Campaigns.** This action will add the contacts and prospects in the import file to the campaign included in the file. This action will not create any response data.

- **Assign to Campaigns/Responses.** This action will take contacts and prospects records from the import file, add them to the campaign, and create responses for them.

Campaign and response data will not be created unless you select one of these additional actions, even if you mapped response or campaign fields. If you do not select an additional action, the import utility ignores response and campaign columns and only creates a list of contacts and prospects.

Mapping Response and Campaign Fields

The List Import view includes the following response and campaign fields for mapping import data:

Response fields. Fields are Response Description (required), Response Type (required), Response Method, Response Status, Response Date, Response Score, Offer Name (required), Offer Code, and Offer Language.

Campaign fields. Fields are Campaign Name (required) and Campaign Source Code.

When mapping, response and campaign fields, be sure to map all the fields required to create a response in the application. The import provides some default values if the user does not include all the required fields.

- If you do not specify Offer Name, the response defaults to the primary offer for the campaign.
- If you do not specify Response Type, the type defaults to Unclassified Response.
- If you do not specify Response Description, the type defaults to the user and time that the record was imported.

If you enable the response business service that performs automatic lookups for Campaign Source Code and Offer Code, you can map the Campaign Source Code and Offer Code fields as an alternative to Campaign Name and Offer Name. In this case, the import utility performs the lookup and default to the related Campaign Name and Offer Name automatically. For more information, see [“Using Response Management” on page 357](#).

NOTE: The Campaign Source Code field in the List Import mappings indicates the source code value assigned individually to each Campaign Contact and Prospect. It does not refer to the Source Code field in the Campaign record (the field displayed on the Campaign form).

Maintaining Attributes for List Records

Prospects have a predefined set of information fields standard in the application. These are the standard types of information about your prospects that normally include address, phone number, email address, and so on. These values are defined in Siebel Tools under the Prospect Business Component.

If the list you want to import has attributes not contained in the standard Siebel prospect table, you can create additional attributes in order to capture the data. Once created, additional attributes appear on the list of available columns that can be mapped in the List Import view.

An additional attribute can contain any type of information, as long as it can be contained in a single field and can relate directly to the prospect record. For example, additional attributes might include hobbies, special contact information (for example, pager #), product interests, survey responses, or demographic attributes.

Creating Additional Attributes for List Records

In order to make an additional attribute available during list mapping, you must first make sure your desired attribute exists and then associate the attribute with the specific list.

To create additional attributes

- 1 From the application-level menu, choose View > Site Map > List Management > Additional Attributes.
- 2 In the Additional Attributes list, create a new record.
- 3 In the Additional Attribute field, type the name of the new attribute.
This is where you create the overall attribute type such as Hobby or Pager #.
- 4 Type a description for the additional attribute, if needed.

Adding Additional Attributes to a List

After you create the additional attributes needed to capture all the data in the list you want to import, you must add them to your specific prospect list and map them to one of the List Import columns.

To add additional attributes to a list

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.
- 2 In the Lists list, query to find the list.
- 3 Click the List Additional Attributes view tab.
- 4 In the List Additional Attributes list, create a new record.
- 5 Complete the fields and then click OK to add the attribute to the list.

Mapping Fields

After you import a list, you must map the fields in the imported list to the fields in the Prospect Business Component. When you do this, the values in the list fields are transferred accurately into the correct fields in the prospect records.

When there is a dedicated column in the prospect table, you should map fields in the imported list to existing fields in the prospects record. Try to avoid mapping fields to additional attribute columns in the database extension table.

To map fields when importing a list

- 1 Determine if an Additional Attribute exists for each special column in the import file that does not map to a Prospect field.
- 2 Create additional attributes, if required.
- 3 Associate the attributes with the list using the List Additional Attributes tab.
- 4 Navigate to the List Import tab. At the top of each column in the external list, select the appropriate field or attribute to which the column should be mapped.
- 5 Click Save as New to save the List Import Format.
- 6 At the top of each column in the external list, select the appropriate prospects record attribute to which the column should be mapped.
- 7 Create additional attributes for columns in your list which have no corresponding prospect field.

Using List Import Formats

Whenever you import a file, you must first save the List Import Format—that is, the sequence of columns that correspond to your file. You can modify and reuse these List Import Formats to import similar files in the future.

To create a List Import Format, simply map the columns in the List Import list and click Save as New in the List Import list. For more information, This saves the List Format and gives it a name that consists of the List Name followed by the saved date/time stamp. For example, My Target List 09/1/2001 12:30:15pm. You can rename the list by navigating to the List Import Formats view and editing the record in the list.

To modify your List Import Format, change any of the columns mappings in the List Import list and click Save. This overwrites the previous format sequence. If you wish to save the column sequence as a new format instead, click Save as New. Both your new and old versions of the Import Format will be available to you in the List Import Formats list.

To apply an existing List Import Format to your list

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.

- 2 In the Lists list, run a query for the list you created.
- 3 Select the list and click the List Import view tab.

NOTE: Make sure the list is of type Imported and has a file attached. If no file is attached, you will receive an error message.

- 4 In the List Import Formats field, click the select button.
- 5 In the List Import Formats dialog box, select the format you wish to use. If necessary, perform a query to locate the format.

NOTE: You may not be able to apply an existing format to a fixed width file if the data was originally created for comma separated or tab delimited file. For .csv or tab delimited files, the column width value defaults to 20, and this may not match the width of the fixed width file that is being used.

Editing the List Import Format Settings

You can administer the precise settings associated with your List Import Format. If the Import Format is to be used in Update Mode, you can specify which columns are allowed to be overwritten in the database. You can see which columns are set to be overwritten by looking at the Allow Field Updates column in the lower list. If the column is checked, that field will be overwritten in any existing prospect record that matches the incoming record. By default, all columns are unchecked, so that no existing information can be overwritten without the administrator's consent.

For files with a fixed width file type, the server will automatically detect the column width and display the width in the List Import Formats view. To see the column width settings, from the Show drop-down list, select List Import Formats and in the List Import Formats list, select the list that relates to your list. If the List Import Format was originally created from a comma separated or tab delimited file, the value will default to 20, although the width will not have any effect during the import task.

NOTE: Columns mapped to Additional Attributes cannot be updated in Update Mode. If you check Allow Field Updates for this column in the List Import Formats view, the system will ignore the setting.

List Import can load a text file in one of three types: comma separated, tab delimited, or fixed width. For files with a fixed-width data type, you can specify the width of each column. The default width is 20. In the bottom list, you can see the column sequence that you have defined in the List Import list. Type the width in the Width field.

Understanding Import Status and Error Messages

When you launch an import task, the List Import list will display the status of the task. The status may show any of the following messages: Submitted Import Request, In Progress, Successfully Complete, Error, or Completed with Errors.

You can view the detailed results of the List Import task by reviewing the log file from the Siebel Server. The log file contains the following information:

- The status of the file import task (in progress, completed, error)
- The number of incoming records
- The number of records imported
- Notification of any record that experienced an error
- Notification of any record that detected a duplicate contact or prospect
- Notification of any record that was updated (update mode only)

- Notification of any response record or associated campaign that experienced an error

To view the log file for an import task

- 1** From the application-level menu, choose View > Site Map > Server Administration > Components.
- 2** In the Component list, query for List Import Service Manager in the Name field.
- 3** Scroll down to the Component Tasks view tab.

You will see component tasks for the import. There may be more than one task for the import job based on the Max Tasks parameter for the server component.
- 4** In the Component Tasks list, drill down on the Task field hyperlink to view the Task Information Log.

NOTE: To review the List Import log file stored in the Siebel file system, click the List Import view tab.

Creating and Managing Internal Lists

List Management allows you to create lists of contact and prospect records stored within your Siebel applications. Internal lists are created within the List Management module by querying existing contact or prospect records in the database. Once you have created these lists, you can reuse the list any number of times for campaigns. Lists are used by Siebel Marketing and Siebel Campaigns.

To create and manage internal lists, perform the following tasks:

- [Creating Internal Lists](#)
- [Adding to Internal Lists on page 487](#)
- [Creating Lists of Prospects Using Additional Attributes on page 487](#)
- [Promoting a Prospect to a Contact on page 490](#)
- [Promoting a Prospect's Response to an Opportunity on page 492](#)
- [Removing Prospects from Lists on page 497](#)
- [Removing Contacts from Lists on page 498](#)
- [Viewing Lists of Contacts or Prospects on page 495](#)
- [Deactivating Lists on page 497](#)
- [Deleting Lists on page 497](#)

Creating Internal Lists

The contacts or prospects you target for each campaign will vary depending on the campaign objective. For example, you might want to select all the contacts who have a certain job title or live in a specific ZIP or Postal code. In another campaign, you might want to combine sets of contacts or prospects that were selected by several different criteria into a single list.

You create an internal list of contacts or prospects in the List Management screen using the Contacts or Prospects view. You can also use these views to add contacts or prospects to existing lists.

NOTE: To create an internal list, your employee login must have a responsibility associated with it that includes the List Management views.

You can reuse lists in any number of campaigns or marketing programs.

To create an internal list of contacts or prospects

- 1** From the application-level menu, choose View > Site Map > List Management > Contacts or Prospects.
- 2** In the Contacts or Prospects list, select the individuals that you would like to include or perform a query to find this information.
- 3** After you receive the results of your query, you can select any number of the records for inclusion in the list.

TIP: To select the entire result of your query, click the menu button and select Select All. To remove specific records from the highlighted list, hold down the CTRL key and click the record you wish to exclude.

- 4** With the desired records highlighted, click New Internal List.

This will save a new list and default the list name to your login ID plus the date time stamp (for example, JSMITH 31/12/2001 5:00 pm).

- 5** To see the new list, from the Show drop-down list, select Lists.

NOTE: The list type is defaulted to Internal. You can rename the list to give it a more appropriate reference name at any time.

Adding to Internal Lists

Adding to an existing internal list is similar to creating a new internal list. You can use Add to List to attach prospect to a list of type Internal, D&B, or Imported. You can attach prospects from the All Prospects list or the Prospects by Attribute list.

To add contacts or prospects to an internal list

- 1** From the application-level menu, choose View > Site Map > List Management > Contacts or Prospects.
- 2** In the Contacts or Prospects list, select the individuals that you would like to include or perform a query to find this information.

Once you receive the results of your query, you can select any number of the records for inclusion in the list.

- 3** With the selected records highlighted, click Add to List.
- 4** In the Pick List dialog box, select the appropriate list and click OK.
- 5** To verify that the new records have been added to the list, from the Show drop-down list, select Lists.
- 6** Select the appropriate list, and then click the List Contacts and Prospects view tab to verify that your selected contacts have been added.

Creating Lists of Prospects Using Additional Attributes

You can create lists of prospects by querying the additional attribute data for all prospects. For example, you might create an additional attribute for hobby and then record these values for many of your prospects. For a campaign, you might want to create a list of prospects with certain hobbies, such as sailing or painting.

You can create a list of prospects by using the Prospects by Attribute list. In this list, the New Internal List and Add to List functions are also available. Simply query the list of all prospects using the appropriate attribute and attribute value. Then highlight the desired records and either create a new list or add to an existing list.

Due to the many-to-many relationship between prospects and attributes, you cannot have multiple combinations of attributes and values in a single query. If you wish to create of a list that combines queries, for example Hobby = Skiing AND Preferred Language = Spanish, perform separate queries and use the Add to List function to combine the results.

To create an internal list of prospects using attributes

- 1** From the application-level menu, choose View > Site Map > List Management > Prospects by Attribute.
- 2** In the Prospects by Attribute list, select the prospects that you would like to include in your internal list or perform a query, if necessary.

After you receive the results of your query, you can select any number of the records for inclusion in the list.

- 3** With the records highlighted, click New Internal List.

This saves a new list. The list name defaults to your login ID plus the date time stamp (for example, "JSMITH 31/12/2001 5:00 pm").

- 4** To see the new list, from the Show drop-down list, select Lists and find the default name on the list.

To add to an internal list using prospect attributes

- 1** From the application-level menu, choose View > Site Map > List Management > Prospects by Attribute.
- 2** In the Prospects by Attribute list, select the prospects that you would like to include in your internal list or perform a query if necessary.

Once you receive the results of your query, you can select any number of the records for inclusion in the list.

- 3** With your desired records highlighted, click Add to List.
- 4** In the Pick List dialog box, select the appropriate list and click OK.
- 5** To verify that the new prospects have been added to the list, from the Show drop-down list, select Lists.
- 6** Select the list to which prospects have been added.

- 7 Click the List Contacts and Prospects view tab to see your selected prospects.

Promoting Prospects

Prospects are prospective contacts, people who have the potential to become customers or to be involved in a business activity in some other way. Prospects are candidates for promotion to a contact, an account, or an opportunity. In addition, you can configure the promotion behavior by modifying the promotion map in Siebel Tools.

To promote prospects, perform the following tasks:

- [Promoting a Prospect to a Contact](#)
- [Promoting a Prospect's Response to an Opportunity on page 492](#)
- [Modifying the Promotion Map on page 493](#)

Promoting a Prospect to a Contact

When a prospect satisfies a set of screening criteria, he or she can be promoted to become a contact. The new contact record contains the same name and address information as the prospect record. The additional attribute data associated with the prospect is automatically promoted to categories and category values for the new contact.

When a prospect is promoted, the application checks for the following items:

- List Management confirms whether Data Quality deduplication is enabled. If so, the promotion will match the prospect against all existing contacts. If a match is found, a pop-up window appears showing all the matching contacts. The user can then pick or ignore the matches and proceed with the promotion.
 - If the user chooses an existing contact from the pop-up window, the prospect record will be removed and its associations with any campaigns, lists, or responses will be linked to the selected contact.
 - If the user ignores all the matches in the Pop-up Window, the promotion continues as if no match was detected.
- If Data Quality finds no matching contact or Data Quality is not enabled, the promotion checks if the combination of the Account Name and Account site fields match an existing account record, and one of the following occurs.

- If the combination of the Account Name and Account Site fields match an existing account record, one of the following occurs:
 - If the account name is empty but an account site is specified, an account will be created using the prospects last name as the Account Name value.
 - If the account name exists but the account site is empty, the promotion compares with existing Accounts that have the same Account Name and Account Site. If an identical account exists, the promotion will link the contact to the existing account. For the prospect address fields, either an update or an insert on the Account Address will be performed, based on the Address Name (the user key for Business Address). If there is not a match with an existing account, a new account will be created and the prospect personal address becomes the account address.
 - If no account location or account name is specified, an account will not be created or associated with the promoted prospect. The prospect personal address becomes the contact personal address.

Promoting Multiple Prospects

You can promote multiple prospects using the Promote Many button in some views in the List Management screen. This promotes any prospects for which Data Quality does not find any matches. Prospects that have at least one matching contact will not be promoted when you click Promote Many. If you do not enable Data Quality, selected prospects will be promoted to contacts.

NOTE: When a prospect is promoted, a contact record is created with matching field information and the prospect is removed from the list of all prospects.

To promote a prospect using the Prospects More Info view

- 1 From the application-level menu, choose View > Site Map > List Management > Prospects.
- 2 Use one of the following methods to promote prospects:
 - In the Prospects list, select a prospect record and click Promote.
 - To promote multiple prospects, select the prospect records that you want to promote and click Promote Many.

To promote a prospect using the List Contacts and Prospects view

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.
- 2 Click the List Contacts and Prospects view tab.
- 3 Use one of the following methods to promote prospects:
 - In the Contacts and Prospects list, select a prospect record and click Promote.
 - To promote multiple prospects, select the prospect records that you want to promote and click Promote Many.

To promote a prospect using the Prospects by Attribute view

- 1 From the application-level menu, choose View > Site Map > List Management > Prospects by Attribute.
- 2 In the Prospects by Attribute list, select a prospect record and click Promote.

To promote a prospect to a Campaigns opportunity

- 1 From the application-level menu, choose View > Site Map > Campaigns > My Campaigns.
- 2 In the Campaigns list, select a campaign.
- 3 Click the Overview view tab.
- 4 In the Overview list, select a prospect record and click Create Opportunity.

Promoting a Prospect's Response to an Opportunity

A prospect that responds to a campaign offer can be promoted by promoting the response to an opportunity in the Responses screen. For more information, see [“Promoting a Response to an Opportunity” on page 362.](#)

Modifying the Promotion Map

List Management provides a default path for information to move from the prospect record to the contact record during promotion. Prebuilt maps specify where in the contact record prospect fields should be copied when a prospect is promoted. List Management provides three prebuilt maps for moving prospect information during promotion. Refer to [Table 73](#).

Table 73. Prospect Information

Map Name	Information Promoted	Source Business Component	Destination Business Component
LM Contact Map	Contact related information such as First Name, Email Address, and Job Title.	List Mgmt Prospective Contact	Contact
LM Account Map	Account related information such as Annual Revenue and Line of Business.	List Mgmt Prospective Contact	List Mgmt Account
LM Business Address Map	Business Address information such as City, Country, and Postal Code.	List Mgmt Prospective Contact	Business Address

Using Siebel Tools, you can redirect any of these prospect fields to a field associated with another Business Component. For example, you may decide that you do not want to use the Alias field for the prospect and would like it to hold some other information such as a Back Office Account ID. You may also want to promote that ID to populate a specific field on the contact record, possibly an extension column added to your implementation. To view or change the promotion map, in Siebel Tools, navigate to Business Components > List Mgmt Prospective Contact > Business Component User Properties.

You can see the destination business component by looking under Business Component User Properties for the List Mgmt Prospective Contact and searching for the Map Name in the Name column. The path for the map will be displayed as Destination Business Component: Source Business Component. For example, Contact: List Mgmt Prospective Contact.

In this case, all three default maps use the List Mgmt Prospective Contact business component as the source.

To modify the promotion map, you can change a user property in the map to promote the information to a different field in the Destination Business Component for the map.

Alternatively, if you wish to promote user properties to a destination business component other than the three default maps, you might create a new map for those user properties.

Modifying Map Entries

To insert or modify a map entry, first determine which map to use for a given set of source and destination fields. Then add an entry using the following syntax:

```
Name Column: [MAP NAME]: [DESTINATION FIELD]
```

```
Value Column: [SOURCE FIELD]
```

- **Map Name.** The name of the map specified under the corresponding row in the Business Component User Properties.
- **Destination Field.** Field in the Destination Business Component to receive source data. The Destination Business Component is map specific, but configurable.
- **Source Field.** Field in the Source Business Component from which to extract data. Source Business Component is map specific, but configurable.

Each map only works with a specific source and destination Business Component. However, users can make copies of the Business Components and rename them.

To modify the source and destination Business Components of these mappings, the user must modify the following Business Component User Prop:

```
Name Column: [Map Name]
```

```
Value Column: [Destination Business Component]:[Source Business Component]
```

Viewing and Maintaining Lists

A list in Siebel Marketing is a group of contact or prospect records in the Siebel database. The list file name is assigned by Siebel Marketing in the following format:

{P or L}/[campaign source code][wave code]_[unique identifier].txt

NOTE: P stands for Preview and L stands for List.

If there is a need to influence the list's file name, you can change the Campaign Source Code by modifying the Source Code Field in the Campaigns screen's All Campaigns across Organizations view or change the campaign's Wave Code in the Campaigns screen's Waves view tab.

List Management contains several features for helping you manage your list data.

- [Viewing Lists of Contacts or Prospects](#)
- [Deactivating Lists on page 497](#)
- [Deleting Lists on page 497](#)
- [Removing Prospects from Lists on page 497](#)
- [Removing Contacts from Lists on page 498](#)

Viewing Lists of Contacts or Prospects

You can view the list members and details about them in several ways. If you know the name of the list, you can start at the Lists view. If you want to see what other lists a contact or prospect may be on, you can also start at the Contacts or Prospects List view.

To view a contact or prospect list from the Lists view

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.

- 2 In the Lists list, select the list record and click the List Contacts and Prospects view tab.

The List Member view shows all of the contacts or prospects on the list you selected. If the Contact column is checked, the person is a contact. In addition, the person's name appears either in the Contact Last Name or Prospect Last Name column to further identify if the person is a contact or prospect.

- 3 Click the last name hyperlink, and one of the following occurs:
 - If you clicked a Contact name, the Contact Detail view appears, with the Activity view tab selected.
 - If you clicked a Prospect name, the Prospective Contact Market Segment view appears, with the Prospect Additional Attributes view tab selected.

To view contact or prospect information from the Contacts or Prospects List view

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.
- 2 From the Show drop-down list, select Contacts or Prospects.

Depending on which you chose, the Prospect List view or Contact List view appears.
- 3 Select the record of the Contact or Prospect you are interested in.
- 4 Click the last name hyperlink, and one of the following occurs:
 - If you clicked a Contact name, the Contact Detail view appears, with the Activity view tab selected.
 - If you clicked a Prospect name, the Prospective Contact Market Segment view appears, with the Prospect Additional Attributes view tab selected.

Deactivating Lists

Many times lists are acquired from outside sources such as other companies, Web sites, and events such as seminars and trade shows. Because this data typically represents prospective customers who are not active customers, you may wish to deactivate any remaining prospects who have not been promoted to contacts. Additionally, lists can be generated by different users for a specific campaign or business situation, so you may want to keep lists active only for a specified period of time.

NOTE: To deactivate a list, change the values in the Status and Expiration Dates fields. navigate to the List Management screen and select the Lists view. In the Lists list, select the list you want to deactivate. In the Lists form, change the status to Inactive or set the expiration date. The expiration date is an information-only field and does not affect your use of the list.

Deleting Lists

To delete a list, navigate to the Lists view of the List Management screen and select your list from the Lists list. Click the menu button and select Delete Record. This will delete the list as well as the association with any contact or prospect records.

NOTE: When you delete a list, this does not delete the contact or prospect records themselves. This is because those names may also be used on other lists at the same time.

Removing Prospects from Lists

A prospect cannot be removed from a list using the List Contacts and Prospects view, because the prospect may appear on more than one list. You have more control over individual prospect lists when you remove the association between the prospect record and its list. If you remove all list associations for a prospect, the prospect record is deleted.

To remove a Prospect from a list

- 1** From the application-level menu, choose View > Site Map > List Management > Lists.
- 2** In the Lists list, select the list and click the List Contacts and Prospects view tab.
- 3** In the List Contacts and Prospects list, select the record you wish to remove and drill down on the first or last name of the prospect.
- 4** Click the Prospect Lists tab.
- 5** In the Prospect Lists list, select and delete the list or lists from which you wish to remove the prospect.

If you select and delete all of the lists, the prospect record is also deleted.

Removing Contacts from Lists

Contacts can be removed from all lists, but the Contact record remains in the database.

To remove a Contact from a list

- 1** From the application-level menu, choose View > Site Map > List Management > Lists.
- 2** In the Lists list, select the list and click the List Contacts and Prospects view tab.
- 3** In the List Contacts and Prospects list, delete the record you wish to remove from the list.

Integrating List Management with D&B

List Management can be used in conjunction with Siebel Dun & Bradstreet Integration Solution to generate lists of prospects from the D&B dataset. Within Siebel Dun & Bradstreet Integration Solution, the user can perform a query on D&B accounts and generate a list of prospects from the results of the query. These prospects can then be targeted in a campaign and promoted to active contacts.

List Management uses the D&B D-U-N-S number to provide data consistency throughout this process. The D-U-N-S number is associated with all prospects derived from the D&B data. After a D&B prospect is promoted to a contact, the D-U-N-S number is used by the D&B update routine to continually refresh the data for those new contacts and their associated account information. To use List Management with Siebel Dun & Bradstreet Integration Solution, perform the following tasks:

- [Viewing Account Data for a D&B Prospect](#)
- [Promoting a D&B Prospect on page 500](#)

Viewing Account Data for a D&B Prospect

The account related to a D&B prospect may already exist as a Siebel account. You can use the following procedure to view account information after you promote an account from a D&B account to a Siebel account.

To view the account information for a D&B prospect

- 1 From the application-level menu, choose View > Site Map > List Management > Lists.
- 2 In the Lists list, locate and drill down on the D&B list name.
- 3 In the List Contacts and Prospects list, drill down on the name in the Prospect Last Name field.

NOTE: Make sure you select the Prospect Last Name and not the Contact Last Name.

- 4 Click the More Info view tab.

- 5 In the Prospects list, drill down on the Matched Account Name hyperlink.

Promoting a D&B Prospect

When you promote a D&B prospect to a contact, promotion checks to see if a Siebel Account with the same D-U-N-S number exists and the following actions occur:

- If a Siebel account exists with that D-U-N-S number, the promotion proceeds according to the standard promotion process in [“Promoting a Prospect to a Contact” on page 490](#). After the promotion, any other prospects from that same D&B account are removed from the list.
- If there is no Siebel account with that D-U-N-S number, the application invokes the D&B account promotion, which then promotes the account and all its associated contacts, industry information, and other information. For more information, see the chapter about D&B in *Applications Administration Guide*.

NOTE: List Management will not promote a prospect with an invalid D-U-N-S number. A D-U-N-S number is considered invalid if it is not contained in the D&B Accounts table.

Launching Programs and Campaigns 21

When you launch a campaign, the Server Request Broker starts the Campaign Launch workflow process. This process automatically sends contact list files to specified vendors, most commonly using FTP (file transfer protocol), and offers are sent to targeted recipients.

You can launch a marketing program in the following two ways:

- **Launching Programs Manually.** You can launch a marketing program manually using the Program Flow or Program Explorer views. For more information about manual execution, see [“Launching Campaigns Manually” on page 505](#).
- **Launching Programs Automatically.** You can launch a marketing program automatically and schedule recurring programs using the Schedule view. For more information about automatic execution, see [“Using the Schedule Calendar View” on page 511](#).

Email, eNewsletter, and fax campaigns use Siebel Server’s Communications Manager component, which is started automatically when the Siebel Server starts. Communications Manager is a request-mode server component. It relies on the services of the Server Request Processor and Server Request Broker server components. Each of the three components must be running on the Siebel Server for communication requests to be dispatched successfully.

NOTE: On the Marketing Server component, a parameter called Wave Batch Size determines the number of subwaves created. Each subwave creates a new request or thread, so it is important to factor in the multithreading capabilities of your email server when you set this parameter. If your email server limits the number of threads, the Wave Batch Size parameter should reflect that limitation.

Siebel Marketing supports Universal Email Delivery (MIME Alternate), which provides the ability to include multiple email formats in the same launch of an email campaign. For email or eNewsletter offers, the Siebel Communication Manager distributes outbound email using a multithreading process. The Server Request Broker supports load balancing of outbound email across multiple Siebel Servers when launching campaigns targeting thousands of online contacts, as shown [Figure 7](#).

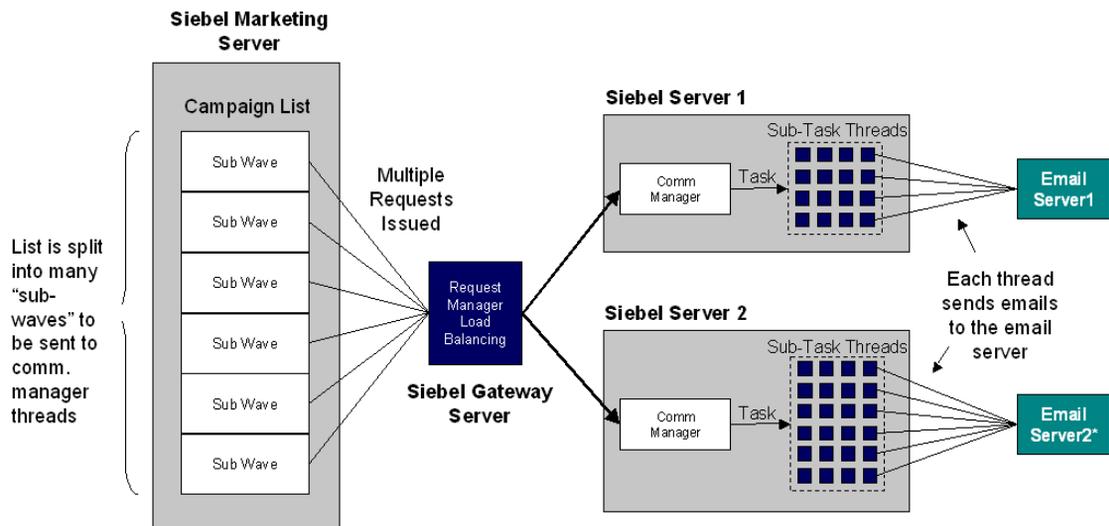


Figure 7. Load Balancing of Outbound Email

Prerequisites for Launching Campaigns Manually

Before launching a campaign manually, make sure you have performed the following tasks:

- [“Adding a Position to the Marketing Administrators Access Group” on page 46](#)
The position of the person who launches the campaign must be a member of the Marketing Administrators access group. If the position is not part of this access group, the launch buttons will be unavailable.

NOTE: This also applies to a partner using the partner portal.

- Create the marketing program in the All Program Plans view. For more information, see [Chapter 13, “Designing Marketing Program Plans.”](#)

NOTE: To successfully launch a campaign manually, you must set the end date of the stage and the End Date of the program in the Schedule view tab.

- In the Program Flow view, associate stages, segments, campaigns, and internal lists to the program.
- Using the right-click menu in the Program Flow view, generate a snapshot with counts.

NOTE: When you generate a snapshot, a snapshot file is only created if a campaign contains a segment. When a campaign has a list (and no segment) in the program flow, generating a snapshot creates a campaign and no snapshot file. For more information, see [“Generating a Snapshot File” on page 435](#). You can launch this campaign in the same ways that you launch any other campaign.

- In the Allocation view, allocate segment counts to campaigns.
- In the Campaign Waves view, set up waves and distribution to vendors.
- In the Program Flow view, use the right-click menu to load the campaign. This generates the vendor lists and adds the contacts to the Siebel Contacts and Campaign History tables for response tracking.

- If you are sending offers that use a distribution profile, you test the campaign to make sure using that the profile is set up correctly, and that offer is sent with expected results. For more information on testing campaigns, see [“About Testing Campaigns and Offers”](#) on page 353.

Launching Campaigns Manually

You may choose to manually launch a campaign for a one-time occurrence of a program and campaign. You can manually launch a campaign using the Launch Campaign command from the Program Flow view's right-click menu or from the Program Explorer menus. Automatic launch is always available as an option for a nonrecurring program.

After performing tasks in [“Prerequisites for Launching Campaigns Manually,”](#) you are ready to launch the campaign from the Program Flow view.

Launching a campaign calls the Campaign Launch workflow process. After launching a campaign, you can check the results by looking at history records—Program, Stage, and Campaigns. For more information, see [“Tracking Program, Stage, and Campaign History”](#) on page 515.

To manually launch campaigns

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Programs list, select the program and click the Program Flow view tab.
- 3** In the Program Flow view, select the campaign object in the workspace, right-click, and choose Launch Campaign from the menu.
- 4** In the Launch Campaign dialog box, select the campaign and click Submit.

Checking Campaign Launch Status

Navigate to the Server Components Requests screen to check the status of the campaign launch. If campaign launch fails, you can view an error log using the Server Administration screen's Server Tasks view.

To monitor campaign launch status

- 1** From the application-level menu, choose View > Site Map > Server Administration > Enterprise Operations > Component Requests.
- 2** In the Component Requests list, locate the component/job for the campaign launch.

The job for Campaign Launch is Workflow Process Manager.

- 3** In the Status field, review the status of the component request.

If campaign launch is successful, Success appears in the Status field. If a problem occurred, Error appears in the Status field, and additional information about the error appears in the Completion Information field.

If the campaign's Status field does not show Completed, refresh the list to track changes in status.

To view the task log

- 1** From the application-level menu, choose View > Site Map > Server Administration > Tasks.
- 2** In the Tasks list, locate the component and task.
- 3** Click the Task Info log view tab.

Stopping and Resuming or Restarting a Email Campaign

An email campaign can be stopped (suspended) and then resumed or restarted. To perform these actions, you need to enable email recipient logging using the Enable Campaign progress tracking check box in the Campaigns Screen. When you enable campaign progress tracking, the Done check box is checked in the Campaign Contacts/Prospects view for all contacts and prospects if the system tried to send an email offer. For example, if a recipient's email address is invalid, the offer would not be received but the Done check box would be checked.

After you enable campaign progress tracking, you can launch the email campaign. After launch, one or more requests are created and submitted to Communications Server. The number submitted depends on the number of people allocated to each wave and the system settings in Communications Server and your email server.

To stop and resume or restart a campaign

- 1** From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2** Click the Status view tab.
- 3** In the Status list, drill down on the Campaign Name hyperlink for the campaign you want to monitor.

- 4 Click the Email Status tab and click the appropriate button.

When you click the Stop, Resume, or Restart buttons, a confirmation dialog box appears. If you click OK, another message appears explaining what actions were taken. If you click Cancel, the system will not stop, resume, or restart the selected campaign.

Button	Description
Stop	Click Stop to suspend the email campaign. This action cancels pending requests on the Communications Server that have not been executed. An email campaign can have many requests that are pending or in progress in the Communications Server. If all the requests are executing when you click Stop, the email campaign cannot be stopped.
Resume	Click Resume to sent email requests that were not sent (cancelled) when you clicked Stop. Communication Server requests that were cancelled will be cleared and replaced by a new request. When you click Resume, only contacts and prospects without a check in their Done check box will be sent the email offer. You cannot resume a queued request without stopping it first.
Restart	Click Restart to contact all contacts and prospects in the Campaign again, even if they were sent the email before you clicked Stop. When you click Restart, the Campaign's contact history is overwritten and will reflect the result of the latest launch. You cannot restart a queued request without stopping it first.

The following scenarios describe changing campaign wave information after launching a campaign:

- Scenario—Changing Lag Days

Campaign X has five contacts, one wave (wave A) containing all contacts in the campaign, and no lag time. When you load and then launch the campaign, all 5 offers are sent. Then, you change the wave definition as follows:

- Wave A. Do not change lag days and reduce the included contacts to 50%.

- Wave B. You add a second wave (wave B) with 2 days lag time and containing 50% of the contacts.

When you click Restart, all five offers are sent a second time. The new wave information is ignored because it only takes effect the next time you load the campaign.

NOTE: Clicking Stop in this scenario would have no impact because Campaign X fully executed all offers.

- Scenario—Stopping and Restarting When Requests are Queued

Campaign Y has five contacts and two waves (waves A and B). Wave A has no lag days, a Wave Code of A, and 50% of the contacts. Wave B has one lag day, a Wave Code of B, and 50% of the contacts.

When you load and then launch the campaign, three offers are sent (Wave A) and two offers are queued for Day 1 (Wave B). Then, you change the wave definition as follows:

- Wave A. Do not change lag days. Change the Wave Code to A1 and increase the included contacts to 80%.
- Wave B. Change lag days to 0, Wave Code to B1, and reduce the included contacts to 20%.

When you stop and then restart the campaign, all five offers are sent because the system recognizes the new lag day value and Wave Codes but ignores the wave %. Wave % won't take affect until the next time you load the campaign. You can see the new codes in the Contacts/Prospects and Email Status views tabs.

Monitoring the Status of an Email Campaign

After campaign launch, you can monitor the campaign status. Each request in the Email Status list shows the number of recipients to whom the email has been sent in the Status Message column.

- 1** From the application-level menu, choose View > Site Map > Campaigns > My Campaign Plans.
- 2** Click the Status view tab.
- 3** In the Status list, drill down on the Campaign Name hyperlink for the campaign you want to monitor.
- 4** Click the Email Status tab.
- 5** In the Email Status list, click Query and then click Go.

You do not need to type criteria. When you leave all fields blank, the list reappears with all fields updated.

Using the Schedule Calendar View

When you complete a program design using Program Flow, you can schedule the program for automatic execution using the Schedule calendar view. During automatic program execution, a snapshot is generated and then the Campaign Load and Campaign Launch workflow processes run. When the first occurrence of a program plan is completed in a multistage program, program execution reschedules itself for the second occurrence. For more information about workflow processes, see *Siebel Business Process Designer Administration Guide*.

The Schedule view displays the details of the selected program in the Program form at the top and a calendar at the bottom.

Scheduling a Program Execution

Use the following procedure to schedule marketing programs for automatic execution.

To schedule a program execution

- 1** From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2** In the Program Plans list, select the program and click the Schedule view tab.
- 3** In the Calendar view, click the calendar icon within the day that the program will start.
- 4** In the calendar form, complete the fields using the following table as a guide.

Field	Comment
Type	Required. The Type field displays Marketing Program as the default. If Marketing Program does not appear in the field, select it from the list.
Planned Start	The default value in this field is the program start date. Click the calendar select button, use calendar controls to set the start date and time for program execution.

Field	Comment
Planned Completion	The default value in this field is the program's end date. Click the calendar select button, use the calendar controls to set the date and time.
Description	This field automatically displays the previously added program description. Type additional information if desired.
Until	If the program is repeating, click the calendar select button, use the calendar controls to select a date.
Frequency	If the program is repeating, choose the repeat cycle from the list. Options are Daily, Weekly, Monthly, Quarterly, Yearly.
Comment	Type additional information about the program schedule, if desired.

- 5 Click Save This One when you are ready to save the schedule.

The program name and launch time appear in the Schedule calendar. The calendar also reflects any recurrence of the program.

- 6 In the Program form, click Activate Schedule to queue the program for execution.

Click OK in the message dialog box to confirm the start date and time. This submits a server request to run the Program Execution workflow process on the first calendar occurrence.

CAUTION: Do not schedule concurrent program executions. If you click the Activate Schedule button twice, and ignore the caution message about double-scheduling a program, two server process requests will be generated, resulting in snapshot conflicts.

To edit the schedule

- 1 From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2 In the Program Plans list, select the program and click the Schedule view tab.
- 3 In the Schedule's calendar, drill down on the program name link.

- 4 In the Schedule form, make changes and click Save This One.
- 5 Click Activate Schedule.

NOTE: To perform this task, you must be assigned to the Marketing Administration access group. If you are not part of this access group, the Activate Schedule button will be unavailable.

To delete a schedule

- 1 From the application-level menu, choose View > Site Map > Programs > My Program Plans.
- 2 In the Program Plans list, select the program and click the Schedule view tab.
- 3 In the Schedule's calendar, drill down on the program name link to open the Schedule form.
- 4 Click the menu button and choose Delete This One.

If the program repeats over time, you will be asked if you want to delete a single instance or every repeating instance.

- 5 Choose the appropriate answer and click OK.

In recurring programs, if an occurrence is deleted, subsequent occurrences are deleted.

Understanding the Campaign Launch Workflow Process

When you launch a campaign, the Campaign Launch workflow process initiates. For more information about workflow processes, see *Siebel Business Process Designer Administration Guide*.

The exported list file is sent to each vendor in the List Distribution list of the Waves view, using distribution adapters and profile information. For example:

- **Email.** The exported list file is emailed to the vendor's primary contact.
- **FTP.** Each vendor has a profile specifying the host name, user name and password. The exported list file is sent using File Transfer Protocol to the vendor's FTP server.

Launching Programs and Campaigns

Using the Schedule Calendar View

For each wave, the server receives a request to send each valid offer in the campaign on the day the program is executed, adding to that date any lag days defined in the wave. Only those contacts or prospects assigned to a particular wave will receive the offer.

Tracking Program, Stage, and Campaign History

You can track the execution history of programs, stages, and campaigns. Using the Status view, you view the status of a newly executed program and, if necessary, you can reschedule (relaunch) a program stage. This relaunches a stage that failed.

When you select Reschedule, the second stage executes, including subsequent stages and recurrences.

NOTE: If the program has multiple recurrences, be careful not to reschedule any that are already on the calendar and have not failed. Reschedule can only be used for single and multistage programs that are automatically executed.

You can find status history in two ways:

- **Programs screen.** Select the program in the My Program Plans list and click the Status view tab for information about the program occurrences.
- **Campaigns screen.** Select the campaign in the My Campaign Plans list and click the Status view tab for information about campaigns.

Each time Siebel Marketing launches a marketing program, it creates program and stage records and schedules the first stage for execution using the Server Component Request. The stage occurrence has an execution status field and a Server Component Request ID. that you can click to drill down to the Server Component Request record, which displays the status of the request. Depending on whether manual execution is performed (right-click from the Program Flow view), or automatic execution (Activate Schedule from the Schedule view), the Request ID reflects the different requests—either a request for the marketing server to generate a snapshot, or run the Program Execution Workflow process.

Program stages contain campaigns. When a campaign in the stage is loaded, Siebel Marketing creates a Campaign record. Contacts and prospects are associated with these campaign records rather than the actual campaign definitions.

Because contacts and prospects are associated with the campaign, this is an important record. The campaign identifier (along with the stage ID) is added in the campaign history table (S_CAMP_CON), which contains the names of those who qualified for the campaign, and is used when managing responses.

Thus, the campaign ID, not the campaign, identifies contacts and prospects that have qualified for a campaign. For example, when you load a campaign, the process creates the campaign record, generates vendor list files, then flags qualified contacts in S_CAMP_CON with the campaign and stage identifiers.

Handling Errors on the Campaign Record

If an error occurs during the execution of a program's stage, the stage's Status field is updated with the error message. The same error appears in the program's occurrence record, indicating that a stage within the program failed. In the event of any error, the program's occurrence stops. If a nonprimary stage for a program errors out, it will not affect the next occurrence. For example, if stage 2 of occurrence 1 fails, stage 1 and stage 2 of the second run of the program will not be stopped.

If an error occurs during the campaign load process, the campaign's status fields are updated with the error message and the system passes the error message to the stage's status and to the program status.

Programs with errors can be rescheduled from the Stages view (accessed by drilling down on the name in the Status view tab of the Program Plans view). For example, if a stage fails, the stage will have a status of Error. By choosing the Reschedule button from this view, you can submit a request to rerun the failed stage occurrence.

Selecting an Occurrence

When you load or launch a campaign plan or program plan, you must know which campaign or program to select in the dialog box, especially if your marketing program is multistage and recurring. In most cases, the occurrence you want will be the most recent occurrence record. But in some cases, you will need to find the correct record in the dialog box list of program and campaign occurrences.

Table 74 shows a sample multistage program in which stages are set to occur every 45 days and occurrences are associated with the stage.

Table 74. Multistage Program with Occurrences

Occurrence	1/01	1/15	2/01	2/15	3/01	3/15	4/01
Program 1	Stage 1			Stage 2			
Program 2			Stage 1			Stage 2	
Program 3					Stage 1		

- In program 1, an offer is sent to contacts—new customers—who qualify for a campaign. During Stage 2, those that responded are sent a Welcome package.
- In program 2, a repeat cycle, an offer is sent to new customers who are different from those in Program 1, but Stage 1 of program 2 is set to begin before Stage 2 of program 1.

Which program record do you choose if Stage 2 in program 2 produces an error message and needs to be relaunched?

When in doubt, choose the parent occurrence. In this case it is Stage 1 of program 1. In most cases, it will be the latest program or stage occurrence in the dialog box, but, as shown in the example in Table 74, the occurrence you need may be located further down the list.

If you have a multistage, recurring program and you are not sure you will be able to find the parent stage occurrence when you load a campaign, navigate to the stage occurrence record and rename it to something you will recognize, such as Execute Stage 1.

Launching Programs and Campaigns

Tracking Program, Stage, and Campaign History

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