



## **eaMarket™ User's Guide**

**eaMarket™ is a member of the eaSuite™ product line**

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edocs, Inc., Two Apple Hill, 598 Worcester Road, Natick, MA 01760

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# Preface



eaMarket is the personalization management solution that enables companies to increase revenue and improve customer satisfaction by weaving personalized marketing and customer service messages throughout the online account management experience.

The online statement is the best platform to create recurring one-to-one relationships with your customers, as it provides personal, time-sensitive and financially relevant information. Transactional account data – such as purchase history, investment activity and service and usage charges – allows you to gain the most insight into your customers and optimally personalize your marketing campaigns. With eaMarket, you can deploy targeted marketing and customer service messages based on the customer's dynamic account and transaction data.

Online marketing demands real actions in real time. eaMarket allows your marketing team to design, schedule, evaluate, and manage the entire process from anywhere on your network – all from a browser-based user interface that operates without heavy involvement from your IT department.

Move beyond your competition. Use eaMarket to send your customers personalized e-serts™ instead of envelopes full of one-size-fits-all inserts. Increase cross-sell and up-sell offer acceptance rates with personalized messages that are based on your customer's actual account activity.

With eaMarket, you can deliver the right message to the right customer at the right time.

## About Customer Self Service and eaSuite™

### eaSuite

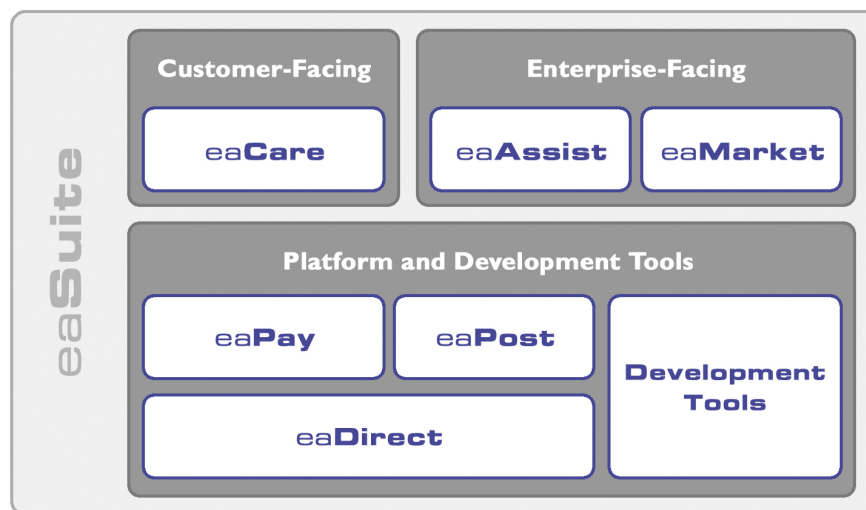
edocs has developed the industry's most comprehensive software and services for deploying Customer Self-Service solutions. eaSuite™ combines electronic presentment and payment (EPP), order management, knowledge management, personalization and application integration technologies to create an integrated, natural starting point for all customer service issues. eaSuite's unique architecture leverages and preserves existing infrastructure and data, and offers unparalleled scalability for the most demanding applications. With deployments across the healthcare, financial services, energy, retail, and communications industries, and the public sector, eaSuite powers some of the world's largest and most demanding customer self-service applications. eaSuite is a standards-based, feature rich, and highly scalable platform, that delivers the lowest total cost of ownership of any self-service solution available.

eaSuite is designed to support how organizations approach designing and deploying Customer Self-Service applications:

**Customer-Facing Solutions** present customers with the sophisticated functionality to meet customers' self-service needs. eaSuite offers a full set of capabilities to enable the range of business and consumer customer service activities, along with the flexibility to completely customize the solution to meet vertical industry and specific company requirements.

**Enterprise-Facing Solutions** empower employees within an organization and external partners to leverage the edocs platform to facilitate self-service and to support assisted service. Customer service representatives (CSRs), sales agents, account managers, marketing managers, broker-dealers and channel partners all play a role in delivering customer service, creating content, accessing information and performing activities for the benefit of customers.

**Platform and Development Tools** are designed to meet the rigorous infrastructure demands of the most technologically advanced organizations. These components of the eaSuite power edocs solutions with the functionality and development tools necessary to make account data available, and to create the customer- and enterprise-facing applications that enable customer self-service.



### eaAssist

eaAssist™ reduces interaction costs and increases customer satisfaction by enabling enterprise agents – customer service representatives (CSRs), sales agents, broker-dealers and others – to efficiently access critical account data and service-related information to effectively service customers. Through its browser interface designed especially for the enterprise agent, eaAssist enables agents to take advantage of customer-facing online capabilities to provide better service by more efficiently resolving customer account inquiries at the point of customer contact.

### eaDirect

eaDirect™ is the core infrastructure of enterprise Customer Self-Service solutions for organizations large and small with special emphasis on meeting the needs of organizations with large numbers of customers, high data volumes and extensive integration with systems and business processes across the enterprise. Organizations use eaDirect with its data access layer, composition engine, and security, enrollment and logging framework to power complex Customer Self-Service applications.

### **eaPay**

eaPay™ is the electronic payment solution that decreases payment processing costs, accelerates receivables and improves operational efficiency. eaPay is a complete payment scheduling and warehousing system with real-time and batch connections to payment gateways for Automated Clearing House (ACH) and credit card payments, and payments via various payment processing service providers.

### **eaPost**

eaPost® is the account content distribution system that handles all the complexities of enrollment, authentication and secure distribution of summary account information to any endpoint, while also bringing customers back the organization's Website to manage and control their self-service experience.

### **Development Tools**

eaSuite Development Tools™ are visual development applications that provide intuitive graphical user interface (GUI) environments for designing and developing Customer Self-Service solutions. The Development Tools encompass data management, workflow authoring, rules management and accounts receivable integration, as well as a full Software Developers Kit for custom application development.

## **About This Guide**

This guide describes the eaMarket product and how to use eaMarket to create, manage and deploy promotions. Its intended audience is the marketing personnel of a company that has or will deploy eaMarket.

## **Related Documentation**

Online Help for command center functions, and a PDF version of this guide are also available.



Online	How to Access
Help	Select Help from eaMarket command center screens.
A PDF of this guide	A PDF of this guide is available on the eaMarket product CD-ROM.

This guide is part of the eaMarket documentation set. For more information about implementing your eaMarket application, see one of the following guides:

Print Document	Description
<i>eaMarket Production Guide</i>	Describes the eaMarket application, its components, and how to utilize its functionality.
<i>eaMarket Installation and Configuration Guide</i>	Explains how to install and configure eaMarket..
<i>eaDirect Production Guide</i>	Contains instructions for creating applications and jobs, publishing design files, and managing the production environment. It also provides sample enrollment procedures for enabling customers to view and pay bills online, as well as perform a number of other online-bill payment transactions.

## If You Need Help

Technical support is available to customers who have valid maintenance and support contracts with edocs. Technical support engineers can help you install, configure, and maintain your edocs application.

To reach the U.S. Service Center, located in Natick, MA (Monday through Friday 8:00am to 8:00pm EST):

- Telephone: 508.652.8400
- Toll Free: 877.336.3362

## Preface

- E-support: support.edocs.com (This requires a one-time online registration)
- E-mail: [support@edocs.com](mailto:support@edocs.com)

When you report a problem, please be prepared to provide us the following information:

- What is your name and role in your organization?
- What is your company's name?
- What is your phone number and best times to call you?
- What is your e-mail address?
- In which edocs product did a problem occur?
- What is your Operating System version?
- What were you doing when the problem occurred?
- How did the system respond to the error?
- If the system generated a screen message, please send us that screen message.
- If the system wrote information to a log file, please send us that log file.

If the system crashed or hung, please tell us.

## Overview of eaMarket

eaMarket brings statement-related ads online to allow for faster changes and targeted marketing. It allows advertisers and marketers to remotely build, schedule, manage, and evaluate the effectiveness of personalized campaigns without the assistance of IT. With eaMarket, you can deliver the right message to the right customer at the right time.

You create the right message by providing eaMarket with graphic, HTML, or other file content based on marketing promotions or customer service notifications. Your content is then stored and published from a hierarchical content management system.

You can make sure to reach the right customers by building unique customer profiles based on recurring account and transaction information. These customer profiles, called business conditions, permit eaMarket to segment customers based on the current month's statement.

To ensure that you deliver your message at the right time, you and your team approve and manage the deployment schedule for each promotion. A seamless approval workflow process enables content and promotions to be reviewed by one or more levels of authority within your organization prior to deployment.

Then leverage the eaMarket Dash Board to continuously track all active promotions and their effectiveness. Critical on-line marketing metrics can be viewed to evaluate historical campaign effectiveness over any specified period.

## Promotion Lifecycle

The eaMarket process revolves around the creation and management of *campaigns*. A campaign represents a collection of promotions over a period of time.

### Build Promotions

The first step in the campaign process is building the promotions associated with a campaign to personalize web content. This includes the creation of content, such as a banner ad or customer service alert that will be associated with deployed promotions.

Often a campaign consists of several promotions. For example, a marketing department may want to run a campaign that offers certain customers an opportunity to upgrade to “preferred customer” status. That campaign may include banner ads to frequent customers, notices about preferred customer benefits woven into the text of a billing statement, and special messages appearing for customers who are nearly eligible for preferred status.

A campaign may include nearly identical promotions designed to compete with each other, in order to determine which “call to action” is more effective. For example, one promotion may offer 10% off and another 20% off. Or one promotion could have a green background while the other has a blue background. Promotions with the same content and schedule may target different customer profiles.

### Schedule and Manage Promotions

The next step in the campaign process is scheduling and managing those promotions. Promotions may remain the same or be slightly altered through several statement publishing cycles. Authors enter promotions into the eaMarket system, supplying details such as schedule, associated content and target customer profile (business condition) and then submit these promotions for review in an established online workflow approval process. Once a promotion has been completely approved by all parties, it is scheduled for deployment to customer statements.

Each “electronic publishing” of a customer’s statement, as performed by the eaDirect indexing job, incorporates into its online account statement the most recently available and relevant messages as specified by eaMarket. Customers then have the opportunity to click on messages which interest them for more information about the promotion, leading them to other sections of the website.

## Evaluate Campaign Effectiveness

The third step in the campaign process is evaluating the effectiveness of each promotion, and by definition evaluating the campaign as well. eaMarket provides graphical analysis of click-through, impressions, and conversion rates through both real-time monitoring of promotions in deployment as well as post-deployment evaluation. eaMarket can compare similar promotions side by side to help a marketing department determine which messages are more effective. Perhaps the green background has a higher conversion rate than the blue one. Perhaps more people were eligible for an offer in September than that same offer in October. Whatever the case, it is the real-time monitoring and post-deployment evaluation of these promotions which provides the vital feedback for optimizing messages and refining an ongoing campaign. For more information, see *Performance*.

## eaMarket Components

There are several things to plan for and create before you start using eaMarket:

- Business conditions and sections must be present in the applications on the eaDirect server(s) to which you plan to add promotions.
- You must create eaMarket groups and users, based on your organizational requirements. The *eaMarket Production Guide* explains how to create groups and users in eaMarket.
- Content for promotions must be created, approved by the organization, and then deployed and scheduled.

This chapter provides a brief overview of eaMarket and its components.

## Content Management

eaMarket stores content in a hierarchical system. Data stores are at the top of the hierarchy followed by libraries and categories. This system is similar to directories, except that a library cannot contain a sub-library and a category cannot contain a sub-category. The levels of storage are as follows:

Level	Name	Description
1	Data Store	Physical location where content is stored in a database. There can be more than one data store, and it can be in the local database or an interface to an external database. Data stores are configured on the <i>Administration&gt;Data Stores</i> screen.
2	Library	A data store can have one or more libraries, which helps to categorize the data similar to folder in a file system. Libraries are configured on the <i>Administration&gt;Library Settings</i> screen.
3	Category	Categories subdivide a library. You create categories by opening an existing library. Each library has a separate set of categories that cannot be shared between libraries.

Plan your Content in two dimensions – library and categories. For example, you might have the following:

<b>Libraries</b>	<b>Categories</b>
Ads	New offers Asian Offers 3 X 5
Messages (to targeted customers)	
Surveys (URLs)	

Refer to the *eaMarket Production Guide* for information about creating and managing data stores and libraries.

## Groups

Each eaMarket user is assigned to one or more groups. Groups serve two purposes in eaMarket. First, they control which roles and privileges are associated with each eaMarket user. Secondly, the promotion approval process uses groups to control approval workflow.

Each user is assigned to a group with certain privileges.

The workflow functionality in eaMarket allows the user to bring online what was previously done offline: creating, reviewing, and approving promotions. eaMarket can define which group creates promotions, and which groups review and approve or disapprove them prior to their deployment. The workflow process depends on the setup of groups and their privileges.

For more information on the eaMarket workflow, refer to *Workflow*.

Refer to the *eaMarket Production Guide* for instructions about how to set up users and groups.

## Content Development

There are several factors to consider when developing content for eaMarket:

- color
- placement
- size

All of these factors depend on the eaDirect template or the look and feel of your eaDirect statements. This template can be changed outside eaDirect, but sections cannot be added except with the eaDirect Composer.



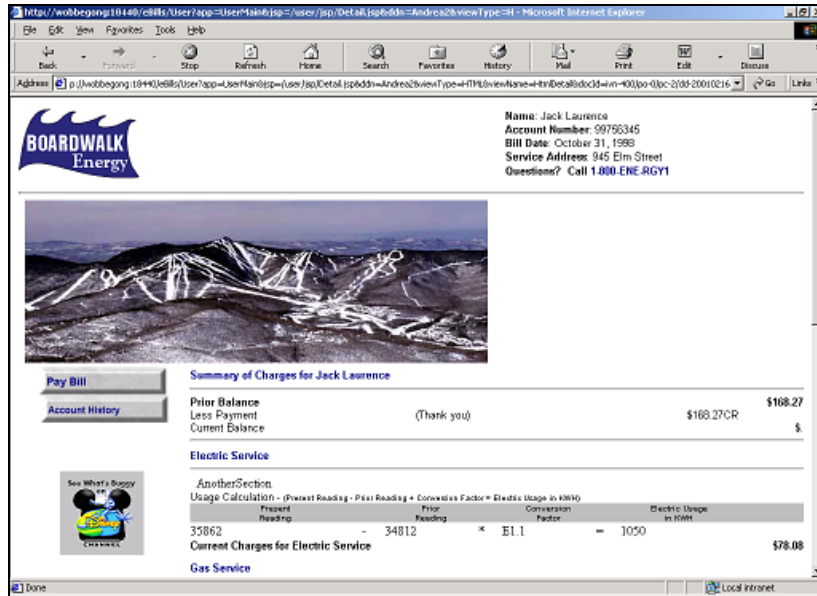
### Caution

Developing and editing eaDirect templates is an advanced skill. Most users require the assistance of the edocs Professional Services organization.

Before developing content, become familiar with your eaDirect template and note the following:

- The backdrop color of the template; this is the background color that your promotion is displayed on.
- The location of the sections, so you can choose where to place your promotions on the statement.
- The size of the section where the promotion is displayed. This is important because placing a promotion that is too large or too small for the section will shrink or stretch the page to accommodate it. For example, the picture below illustrates the effect of placing a promotion in the template that is too large for the section in which it was deployed.





## The eaMarket Interface

This section describes the default interface, the default screen, and briefly explains each button on the toolbar in the left navigation frame.

### Logging In

The eaMarket Administrator creates a user profile for you, and assigns you to one or more groups for promotion approval.

Follow the steps below to login to eaMarket.

1. Enter the URL to the eaMarket server in a browser. For example:  
`http://dusky:9081/eaMarket`



2. Enter your **User Name** and **Password**, then click **Login**. The password is case sensitive.

The **Promotion** screen displays.

## Promotion Screen

The initial screen is the **Promotion** screen, which is a unified front for the marketing executive to access functionality related to promotions and content management. It is the starting point for all navigation through the eaMarket application. The following image depicts an example promotion screen:

Content Search

Promotion Search

Promotion name starts with

From date

Author

To date

Description containing

Sort by

Name A - Z

Search

Reset

Add Promotion

Add Email Promotion

TASK L

View Details	Preview in Bill	View perfor	Title	Status	Author	Scheduled	End Date	
			BigSpender Upgrade	Reviewing	BARRY	2001-12-01	2002-02-01	✗
			EmailCableUpgrade	Created	ADMINISTRATOR	2001-11-15	2001-12-20	✗
			Upgrade to silver	Deployed	TMORGAN	2001-11-16	2002-03-01	✗

## eaMarket Menu





The navigation buttons are displayed on the left side of every eaMarket page, allowing quick access to the eaMarket functions. These buttons are present throughout your session with eaMarket.




- **Promotions** - Create, modify and delete promotions.
- **Content** - Add content for promotions, and manage content libraries.
- **Business Conditions** - Edit and create business conditions.
- **Schedule** - Manage the scheduling of promotions.
- **Performance** - Chart the effectiveness of promotions (Impressions and Clicks).
- **Workflow** - View the status and details of promotions.
- **Administration** - Manage your eaMarket resources. To learn more about eaMarket administration, see the *eaMarket Production Guide*.
- **Help** - Displays the online help.
- **Logout** - Log out of eaMarket.
- **Launch Dash Board** - Display real-time statistics, such as the most recent promotions, scheduled promotions, most watched promotions (highest Impressions) and most used promotions (highest Clicks).

## Status Area

Below the **Add Promotion/Add Email Promotion** area of the **Promotions** page is a status area for your promotions:

Add Promotion   Add Email Promotion								
View Content	Preview in Bill	View Performance	Title	Status	Author	Scheduled	End Date	
			BigSpenderUpgrade	Created	BARRY	2003-02-28	2003-03-02	



- **View Details** - Click the icon to view an image of the content attached to a promotion in a new window.
- **Preview in Bill** - Click the icon to view the content in the bill. This displays the bill with the promotion. Note that the preview shows an image of the bill with the promotion, but does not show any bill data.
- **View Performance** - Click the icon to view the performance of the promotion.
- **Title** - Title of the promotion. Clicking the promotion title takes you to the **Promotion Information** screen, where you can modify the promotion parameters.
- **Status** - Status of the promotion, which can be:
  - Created* – The promotion has been posted for workflow, but none of the reviewers have reviewed it.
  - Reviewing* – The promotion is still in the process of being reviewed.
  - Disapproved* – The promotion has been disapproved at least by one of the reviewers.
  - Deploy Ready* – The promotion has been reviewed successfully at all stages in workflow. Or, the promotion has no workflow associated with it, and is now ready to be deployed.

*Deployed* – The promotion has been deployed and is actively in use on the eaDirect system.

*Undeployed* – The promotion has expired and is now undeployed from the eaDirect system.

*Active* – The promotion is a house ad promotion, which can be used when another promotion expires in the same section as this promotion.

- The **Author**, **Scheduled** and **End Dates** describe who created the promotion and its schedule.
- **Delete the Promotion** - Click on the X to delete that promotion.

### Task List

To the right of the promotion information is a Task List. The Task List provides a summary section to help move promotions through the approval cycle.

TASK LIST
To Comment:
<a href="#">EmailCableUpgrade</a>

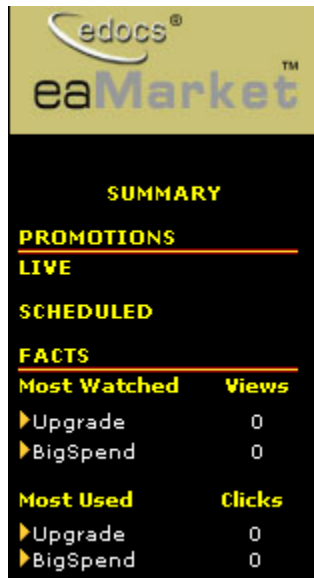
Promotions are listed under the following headings:

- **To Comment** – Promotions to comment on as the observer.
- **To Approve** – Promotions to be approved.
- **Approved** – Approved promotions.
- **Disapproved** – Disapproved promotions.
- **Commented** – Promotions which have comments.

Clicking on the promotion name displays the **Promotion Details** screen.

### Launch Dash Board

The Dash Board provides a summary of promotions.



The screenshot shows the edocs® eaMarket dashboard. At the top is the logo. Below it is a 'SUMMARY' section. Under 'PROMOTIONS', there are sections for 'LIVE' and 'SCHEDULED'. The 'FACTS' section contains two tables. The first table, 'Most Watched', shows 'Views' for 'Upgrade' and 'BigSpend', both at 0. The second table, 'Most Used', shows 'Clicks' for 'Upgrade' and 'BigSpend', both at 0.

SUMMARY	
PROMOTIONS	
LIVE	
SCHEDULED	
FACTS	
Most Watched	Views
▶ Upgrade	0
▶ BigSpend	0
Most Used	Clicks
▶ Upgrade	0
▶ BigSpend	0

Click on a promotion in the Dash Board to view the Performance Details of that promotion.





# Managing Promotions

# 3

## Promotions

A promotion is the Who, What, When, Where, and Why of a marketing promotion:

Element	eaMarket Field	Description
Who	Business Condition	A named group of characteristics that define your target market.
What	Content	The "what" to be shown for a promotion: GIF, JPEG, HTML and URLs.
When	Schedule	When the promotion will run: day, month and year. A Schedule contains a start and an end date.
Where	Section	Piece of screen "real estate" on the HTML template where content will be placed, and which can be associated with conditions. The contents of the section can be changed based on data.
Why	Approvers	The selected group(s) whose members will review and approve the promotion, and verify that this is the right promotion to run.

Before adding a new promotion, be sure that your eaMarket administrator has added a library, and that content has been added to a category in the library. The eaMarket administrator must also add an eaDirect server, and import an application before a promotion can be created.

For more information on adding libraries and eaDirect servers, see the *eaMarket Production Guide*.

Begin by selecting the eaDirect application and content library to use, then select the Who, What, When, Where, and Why.

## Adding a New Promotion

This section describes how to add a web promotion. Email promotions are described in the next section.

1. From the **Promotions** screen, click the **Add Promotion** link from above the list of scheduled promotions. The **Add a New Promotion** screen displays:

The screenshot shows a web interface titled "Add a New Promotion". It is divided into two steps:

- STEP 1: Select an eaDirect Application**
  - eaDirect Servers:** A dropdown menu with "nurse" selected.
  - Applications:** A dropdown menu with "nw" selected.
  - Views:** A dropdown menu with "HtmlDetail" selected, followed by an empty text input field.
- STEP 2: Select a Content Library to use**
  - Lib:** A dropdown menu with "Lib" selected.

At the bottom of the form are three buttons: "Continue", "Cancel", and "Help".

2. Click the drop down arrow adjacent to **eaDirect Servers** and select the eaDirect Server that has the applications for which you wish to deploy a promotion.

3. Select an **Application** from the list of applications available on the eaDirect server you just selected.
4. Select the **View** you wish to use for your promotion.
5. Select a **Content Library** to use, and click **Continue** to go to the **Promotion Information** screen. The next screen is long, and so each section is shown and discussed separately.

Promotion Information					
Promotion Name	:	BigSpender Upgrade	eaDirect Application	:	National
Description	:	Upgrade to gold level ser	Content Library	:	Cable
View Name	:	HtmlDetail			
Promotion Description					
In the BottomLeftNav(Default_Template) section, we will use the content Upgrade to gold with the promotion BigSpender Upgrade					

Enter a unique and meaningful name for the promotion in the **Promotion Name** text box. Next, enter a description for the promotion in the **Description** text box.

eaMarket fills in the **Application Name** and the **Content Library** for you. The next part of the screen is titled **Placing**.

**Placing**

**STEP 1** Select promotion type

☒ General  
☐ House Ad

**STEP 2** Select section

BottomLeftNav(Default\_Template)  
TopLeftNav(Default\_Template)

**STEP 3** Select Business Conditions

BigSpender

**Search**

**Contents from the original section in ALF**

IF BigSpender THEN INSERT eaMarketMnemonic\_1\_4

**Promotion - Step 1.** Choose whether the promotion is to be a general promotion or a house ad. Most promotions are classified as *General*, which means they are created and scheduled normally, applying to a selected section and business condition combination.

A *House Ad* promotion applies to a customer when that customer does not match any other business conditions associated with that section. Only one house ad promotion can be associated with a section. House ads are useful to ensure that valuable real estate in the online presentment of a statement is not left blank for customers who do not fall into one of your target segmentations. The house ad will get deployed when a promotion within the corresponding section is undeployed or deleted.

### Select the Who, What, When, Where and, Why

**Section - Step 2** lists the sections available in the application and view selected from the previous screen. Sections are created in eaDirect's Composer. If you need a section to be created that does not exist, contact your eaDirect Administrator. Selecting a section populates the list of business conditions associated with the statement template.

**Business Conditions - Step 3** lists the business conditions available in the selected application. Choose the business condition you wish to use to create this promotion. Clicking the **Search** button displays a Business Conditions Manager screen, where you can search for the right business condition, change business condition priorities, and include or remove global business conditions from a section.

**Manage Business Conditions**

Section Name : BottomLeftNav(Default\_Template)

**Existing Business Conditions :**

- FirstStmIndicator
- LastStmIndicator
- CurrencyCharges
- Central
- Western
- NegativeRed
- NegativefontRed

**Included Business Conditions :**

- BigSpender

**Business Condition Description**

OK Cancel Help

The right pane lists the currently active business conditions for the selected section. The left pane lists the business conditions defined for the selected application, which are not currently used in the selected section.

You can move a business condition from the **Existing Business Conditions** list to the **Included Business Conditions** list, or remove a business condition from the **Included Business Conditions** list by clicking the horizontal arrows.

A business condition which has a promotion assigned cannot be removed from the **Included Business Conditions** list unless the promotion is first deleted.

The **Included Business Conditions** for this section are listed in order of priority. You can select a particular business condition and increase or decrease its priority by moving it up or down in the list by clicking on the vertical arrows. When a user logs into the eaDirect system, the business conditions are checked in the assigned order of priority until a matching business condition is found.

A house ad business condition always remains at the lowest priority, because it's displayed for a user who does not match any other business condition assigned for that section.

The **Business Conditions Description** area displays the business condition description in a simple format.

Select the business condition to which this promotion should apply from the right pane (**Included Business Conditions**), assign the correct priority to it, and select **OK**.

After choosing a business condition and clicking **OK**, the **Add Promotion** main screen displays.



**4** Select the content to use for this promotion

Title	Type	Author	Description
 Upgrade to gold	TEXT	BARRY	Offer for gold service upgrade

Search

**Content** – In **Step 4**, choose the content that eaMarket will display in conjunction with the promotion. You must find the content you wish to use, and then select it. Find content by clicking the **Search** button:

Content Search

Library

Lib

Category

Content name starts with

Author (User)

Image size greater than

Kilo bytes and less than

Kilo bytes

Content type








ALL

File extension

Description containing


Search

Reset

	Title	Type	Author	Description	
<input type="radio"/>	Upgrade To Gold	GIF	BARRY	Gold Upgrade Content	
<input type="radio"/>	Upgrade Offer1	TEXT	BARRY	Offer1 Content	
<input type="radio"/>	Holiday Offer1	TEXT	BARRY		
<input type="radio"/>	Upgrade Offer2	OTHER	BARRY		
<input type="radio"/>	Holiday Offer2	TEXT	BARRY		
<input type="radio"/>	Special	HTML	BARRY		
<input type="radio"/>	Cable	TEXT	BARRY	Cable Content	

OK

Cancel

Click the radio button of the desired content, and click **OK** to return to the **Promotion Information** screen. If you need to add content, see *Adding New Content*. Click the Preview  button to preview content.

### Approvers - Step 5. Specify approvers for the promotion.

**STEP 5** Specify the approvers for this promotion


Stage	Status	Authorization Group
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Graphic Design
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	IT
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Marketing
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Sales
1	<input type="radio"/> For Review <input checked="" type="radio"/> FYI <input type="radio"/> Do Not Notify	SuperAdministrators
1	<input type="radio"/> For Review <input checked="" type="radio"/> FYI <input type="radio"/> Do Not Notify	VP of Marketing
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Webmaster

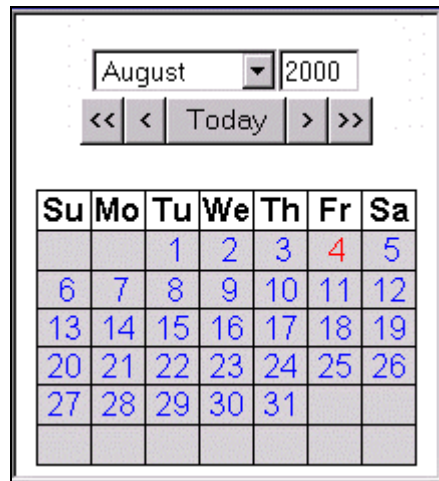
### Promotion Period - Step 6. Specify the start and end dates for your promotion.

**STEP 6** Select promotion period

Start Date : 2001-11-15      End Date : 2001-11-15









Click the Calendar  button to display a popup calendar:



The promotion period is scheduled by day, not time.

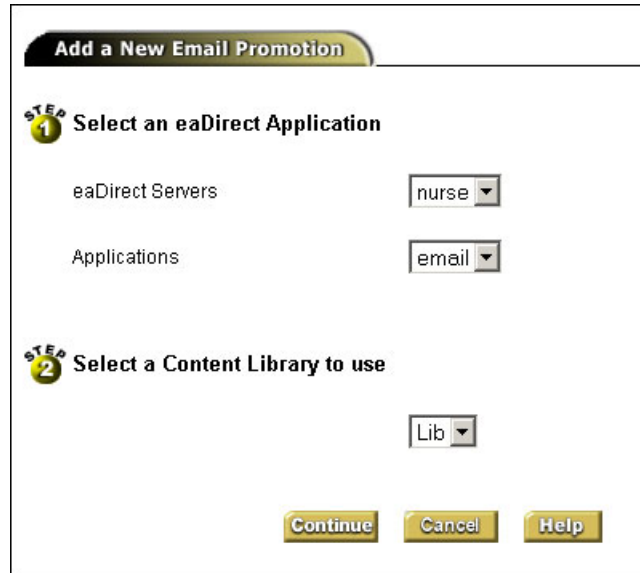
Click **Save Promotion**. The promotion information is displayed on the **Promotions** screen as shown below:

View Content	Preview in Bill	View Performance	Title	Status	Author	Scheduled	End Date	
			Gold Upgrade Offer	Created	ADMINISTRATOR	2003-03-04	2003-03-04	

Click the Preview  button to preview content attached to the promotion, or click the Preview in Bill  button to show a preview of the promotion. Note that previewing a promotion displays blank fields, since there is no account information to populate much of the previewed statement.

## Adding an Email Promotion

Click the **Add Email Promotion** link on the promotion at the top of the promotion list.

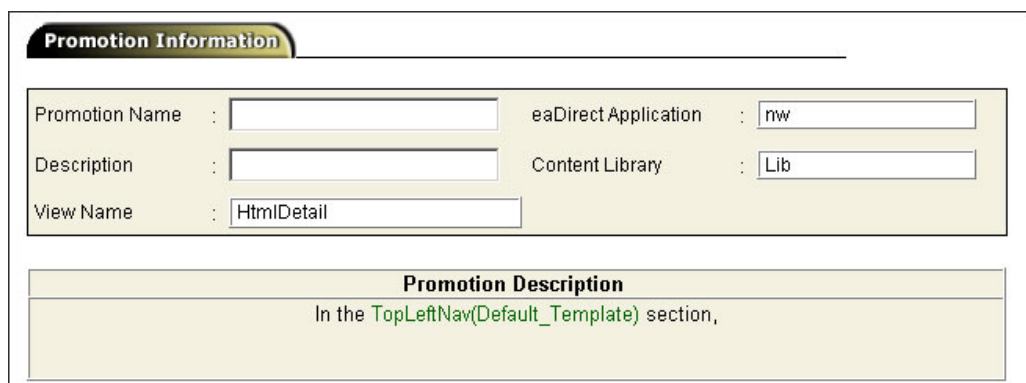


The screenshot shows a dialog box titled "Add a New Email Promotion". It contains two steps:

- STEP 1 Select an eaDirect Application**
  - eaDirect Servers: nurse
  - Applications: email
- STEP 2 Select a Content Library to use**
  - Lib

At the bottom are three buttons: **Continue**, **Cancel**, and **Help**.

After choosing the eaDirect server, application and content library, click on **Continue**. The next screen is long, and so each section is shown and discussed separately.



The screenshot shows a form titled "Promotion Information". It contains the following fields:

Promotion Name	:	<input type="text"/>	eaDirect Application	:	nw
Description	:	<input type="text"/>	Content Library	:	Lib
View Name	:	HtmlDetail			

Below the form is a section titled "Promotion Description" with the text: "In the TopLeftNav(Default\_Template) section,".

Add a unique and meaningful name and description for the new email promotion.

The screenshot shows a web interface titled "Placing" with a yellow header bar. Below the header, there are three steps for configuring a promotion:

- STEP 1 Select promotion type**: Two radio buttons are visible: "General" (selected) and "House Ad".
- STEP 2 Select section**: A list box contains two items: "BottomLeftNav(Default\_Template)" and "TopLeftNav(Default\_Template)".
- STEP 3 Select Business Conditions**: A list box contains one item: "BigSpender".

At the bottom right of the form is a yellow "Search" button. Below the form, there is a section titled "Contents from the original section in ALF" containing the text: "IF BigSpender THEN INSERT eaMarketMnemonic\_1\_4".

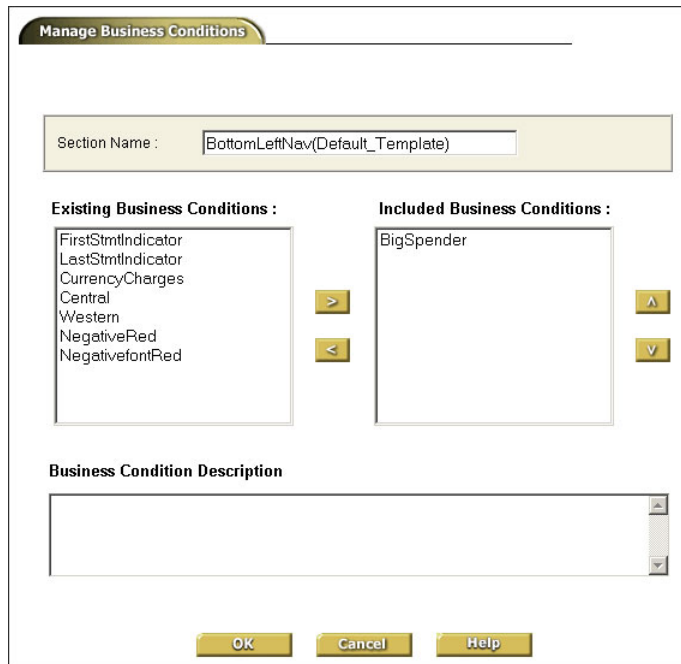
**Promotion Type - Step 1.** Most promotions are classified as *general*, which means they are created and scheduled normally, applying to a selected section and business condition combination.

A *House Ad* promotion applies to a customer when that customer does not match any other business conditions associated with that section. Only one house ad promotion can be associated per section. House ads are useful to ensure that valuable real estate in the online presentment of a statement is not left blank for customers who do not fall into one of your target segmentations. The house ad promotion will get deployed when a promotion within the corresponding section is undeployed or deleted.

**Section - Step 2** lists the sections available in the application and view that was selected from the previous screen.

**Business Condition - Step 3** lists the business conditions available in the selected application. Choose the business condition you wish to use to create this promotion. Clicking the **Search** button brings up a Manage Business Conditions screen, where you can search for the right business condition, change business condition priorities, and include or remove global business conditions from a section.

## Managing Promotions



The 'Manage Business Conditions' dialog box features a title bar with the text 'Manage Business Conditions'. Below the title bar is a 'Section Name' field containing 'BottomLeftNav(Default\_Template)'. The main area is divided into two sections: 'Existing Business Conditions' and 'Included Business Conditions'. The 'Existing Business Conditions' list includes 'FirstStmIndicator', 'LastStmIndicator', 'CurrencyCharges', 'Central', 'Western', 'NegativeRed', and 'NegativefontRed'. The 'Included Business Conditions' list contains 'BigSpender'. Between these lists are '>' and '<' buttons. To the right of the 'Included Business Conditions' list are '^' and 'v' buttons. Below these lists is a 'Business Condition Description' text area. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Manage Business Conditions

Section Name : BottomLeftNav(Default\_Template)

Existing Business Conditions :

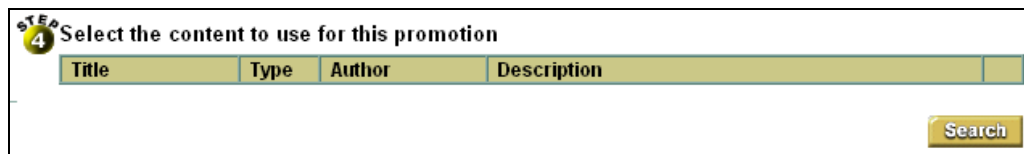
- FirstStmIndicator
- LastStmIndicator
- CurrencyCharges
- Central
- Western
- NegativeRed
- NegativefontRed

Included Business Conditions :

- BigSpender

Business Condition Description

OK Cancel Help



'Step 4: Select the content to use for this promotion' is a dialog box with a title bar. Below the title bar is a table with four columns: 'Title', 'Type', 'Author', and 'Description'. A 'Search' button is located at the bottom right of the dialog box.

Step 4 Select the content to use for this promotion

Title	Type	Author	Description
-------	------	--------	-------------

Search

**Content** – In **Step 4**, choose the content that eaMarket will display in conjunction with the promotion. Use *Search* to find the content, and then select the content to use:

Content Search

Library

Lib

Content type

ALL

Category

File extension

Content name starts with

Description containing

Author (User)

Image size greater than

Kilo bytes and less than

Kilo bytes

Search

Reset

	Title	Type	Author	Description	
<input type="radio"/>	Upgrade To Gold	GIF	BARRY	Gold Upgrade Content	
<input type="radio"/>	Upgrade Offer1	TEXT	BARRY	Offer1 Content	
<input type="radio"/>	Holiday Offer1	TEXT	BARRY		
<input type="radio"/>	Upgrade Offer2	OTHER	BARRY		
<input type="radio"/>	Holiday Offer2	TEXT	BARRY		
<input type="radio"/>	Special	HTML	BARRY		
<input type="radio"/>	Cable	TEXT	BARRY	Cable Content	

OK

Cancel

Click the radio button of the desired content, and click **OK** to return to the Promotion Information screen.

If you need to add content, refer to the *Adding New Content* section.

5

Specify the approvers for this promotion

Stage	Status	Authorization Group
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Graphic Design
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	IT
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Marketing
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Sales
1	<input type="radio"/> For Review <input checked="" type="radio"/> FYI <input type="radio"/> Do Not Notify	SuperAdministrators
1	<input type="radio"/> For Review <input checked="" type="radio"/> FYI <input type="radio"/> Do Not Notify	VP of Marketing
1	<input checked="" type="radio"/> For Review <input type="radio"/> FYI <input type="radio"/> Do Not Notify	Webmaster

**Approvers** - In **Step 5**, specify which groups need to see or approve this promotion, and in what order the groups should approve it. See the *Workflow* section for more information on the approval workflow process.

The workflow system processes this promotion starting with the group(s) with the lowest stage (usually 1) and perform the action specified in the **Status** column above. Notification emails are sent for review or FYI, or notification emails are skipped, depending on the **Status** selected for each group.

Once the promotion passes successfully through this stage, the next stage is processed, and the next, until the last group has either approved or disapproved the promotion. If at any level a promotion is disapproved, a notification email is sent to the creator of the promotion, and processing of that promotion is stopped.

If the eaMarket Administrator has assigned a **Default Approver** for the selected application, the promotion creator must include that group as an approver. Specifying a particular group to always be notified or be required to approve a promotion for a particular application helps you to enforce business rules. Default approvers will have a checkmark next to them on the **Step 5** screen.

**6 Select promotion period**

Start Date : 2001-11-15      End Date : 2001-11-15

Save Cancel Back Help

**Promotion Period** - In **Step 6**, select the time period that the promotion should run, and click on **Save**.



### Caution

Be sure to coordinate the promotion period with the eaDirect Production group, since the promotion period must coincide with the times when the eaDirect Indexer job runs.

Click **Save Promotion**. The promotion information is displayed on the promotions screen as shown below:

View Content	Preview in Bill	View Performance	Title	Status	Author	Scheduled	End Date	
			Gold Upgrade Offer	Created	ADMINISTRATOR	2003-03-04	2003-03-04	

Click the Preview button to preview content attached to the promotion, or click the Preview in Bill button to show a preview of the promotion. Note that previewing a promotion will display blank fields, since there is no account information to populate much of the previewed statement.

## Promotion Search

The criteria for a promotion search includes start of promotion name, author, and/or date range. The search can also be sorted alphabetically by name.

### To execute a promotion search:

1. From the **Content Manager** screen or the **Promotions** screen, click the **Promotion Search** tab. The **Promotion Search** dialog box displays:

Content Search
Promotion Search

Promotion name starts with

Author

Description containing

From date

To date

Sort by
Name A - Z

Search
Reset


Add Promotion
Add Email Promotion

TASK LIST

View Center	Preview in Bill	View Performance	Title	Status	Author	Scheduled	End Date
			test	Created	ADMINISTRATOR	2003-03-04	2003-03-04

Help



- To search by date range, click the calendar buttons  next to the **From date** and **To date** fields, which displays calendars that help select a date range.

November 2001

<< < Today > >>

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

- Click the **Sort by** drop down arrow to sort by name in either ascending or descending order.
- Enter your selection criteria, then click the **Search** button. eaMarket displays the results of your search.

Content Search
Promotion Search

Promotion name starts with
Author
Description containing

From date
To date
Sort by

Search
Reset

Add Promotion
Add Email Promotion

TASK LIST

View Content	Preview in Bill	View Performance	Title	Status	Author	Scheduled	End Date
			Cable	Created	ADMINISTRATOR	2003-03-04	2003-03-04

Help



## Content

Content can be defined as displayable objects that make up a promotion, such as text, images, or a URL.

Before adding new content, be sure that you have added a data store, library, and category (in **that** order), or that it has been done by the eaMarket System Administrator.

- **Data Store** - Database storage area for content. When needed, the eaMarket server connects to a data store to access stored content. An eaMarket server can use multiple data stores.
- **Library** - Created after the data store; there can be many libraries within a data store. Libraries are further defined by categories. eaMarket user groups are granted access to use the libraries.
- **Category** - Created after the library, there should be at least one category for each library within a data store. This further classifies the library's content, based on the type of content.

For more information on creating data stores, libraries, and categories see the *eaMarket Production Guide*.

## Content Manager

The Content Manager allows you to add, edit, delete and search your content using a variety of search criteria.

Content is defined as "what" is to be shown for a promotion. Typical examples of content include:

- Files, including graphics such as GIF or JPG files
- HTML code
- Text messages

### Content Manager Menu

The **Content Libraries** screen displays when you click on the **Content** button in the left navigation frame, which shows a search menu plus a list of available libraries. To locate content to work with, click on the **Open** button to see content in that library, or run a search.

Content Libraries

Content Search

Promotion Search

Library

Content type

ALL

Category

File extension

Content name starts with

Description containing

Author (User)

Image size greater than

Kilo bytes and less than

Kilo bytes

Search

Reset

Add Content

Library	Description	Data store	
Cable	Content related to cable promotions	Primary	Open
Telephony	Content related to telephony promotions	Primary	Open



If you enter content search parameters, and then decide to view the whole library by clicking on a library name, be aware that the parameters are still used.

## Content Search

1. From the **Promotions** or **Content** screens, click the **Content** button. The **Content Manager** screen displays:
2. Enter any of the parameters you wish to use to locate content, and click on the **Search** button.

Content Library

Content Search

Promotion Search

Library

Content type

ALL

Category

File extension

Content name starts with

up

Description containing

Author (User)

Image size greater than

Kilo bytes and less than

Kilo bytes

Search

Reset

Add New Content

Natural Language Viewer

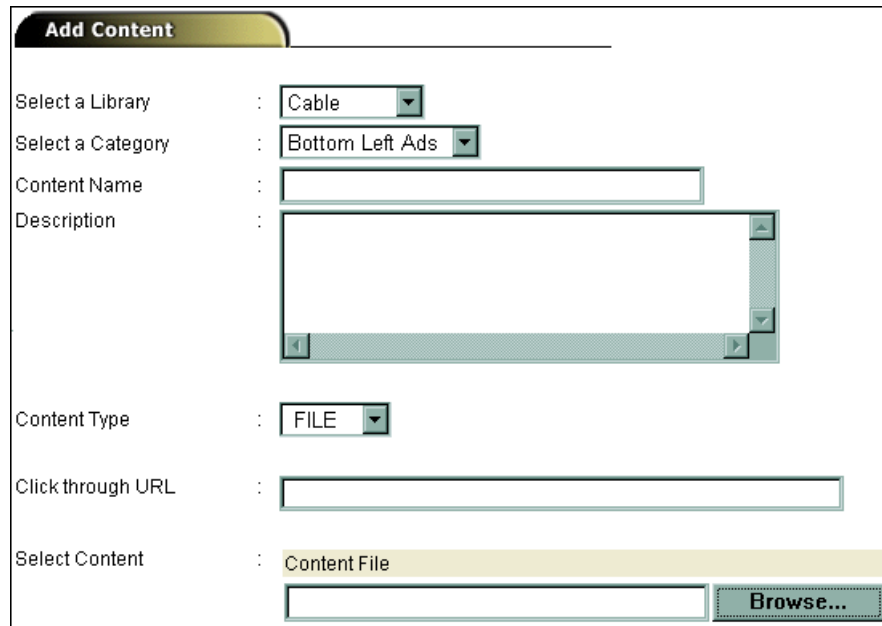
The search for content name with up has found 2 matching content(s)

Content Name	Type	Author	Description	
Upgrade to gold	JPEG	jfoley	Offer for gold service plan upgrade	✗
Updated cable service msg	TEXT	jfoley	Text message informing customers of recent service improvements.	✗

3. eaMarket lists the content that meets the specified search parameters.

## Adding New Content

1. From the Content screen, click **Add Content**. The Add Content screen displays:



The screenshot shows the 'Add Content' form with the following fields and options:

- Select a Library**: A dropdown menu with 'Cable' selected.
- Select a Category**: A dropdown menu with 'Bottom Left Ads' selected.
- Content Name**: A text input field.
- Description**: A large text area with scrollbars.
- Content Type**: A dropdown menu with 'FILE' selected.
- Click through URL**: A text input field.
- Select Content**: A section containing a text input field and a 'Browse...' button.

2. Select a library in which the content will be stored.
3. Select a category to further categorize the content.
4. Enter name to uniquely identify the content within a Library and a Category.
5. Enter Description information for later use and so that the content is easy to find in a search.
6. Select the type of content using the drop-down arrow next to Content Type: FILE, TEXT, and HTML.
7. Enter the promotion's corresponding URL. The **Click-through URL** is the site where you want to bring the end user when that person clicks on your promotion.

8. Click **Browse** to specify the path to the location of the actual content file on your system.

eaMarket does not allow you to select more than one file as content for a single promotion.

9. Click **save**. You will be returned to the **Content Libraries** screen:

Content Libraries

Content Search

Promotion Search

Library

Content type

ALL

Category

File extension

Content name starts with

Description containing

Author (User)

Image size greater than

Kilo bytes and less than

Kilo bytes

Search



Reset

Add Content

Library	Description	Data store	
Cable	Content related to cable promotions	Primary	Open
Telephony	Content related to telephony promotions	Primary	Open

## Editing Existing Content

For this example, the following image shows the *Cable* library from the library search result screen. The content that is part of the *Cable* library is displayed:

Add Content   Categories				
Natural Language Viewer				
The search for the library <b>Cable</b> has found 2 matching content(s)				
Content Name	Type	Author	Description	
 <a href="#">Upgrade to gold</a>	JPEG	jfoley	Offer for gold service plan upgrade	✗
 <a href="#">Updated cable service msg</a>	TEXT	jfoley	Text message informing customers of recent service improvements.	✗
Result Pages 1				

Selecting [Upgrade to gold](#) yields the following screen:

Edit Content	
Library Name	: Cable
Category Name	: Top Left ads
Name	: Upgrade to gold
Author (User)	: jfoley
Published Date	: 2001-11-13 14:58:09
Stage	: New
Description	: Offer for gold service plan upgrade
Content Type	: FILE
Click through URL	: http://www.edocs.com
Content File	: C:\Documents and Settings\jfoley\My Documents\My Graphics\promotions\upgrade to gold.jpg
	Change This To
	<input type="text"/> <input type="button" value="Browse..."/>



The first few fields show the **Library Name** that holds this content, the **Category Name** that this content belongs to, the **Name** of this content, and the **Author** of this content, who is a user of the eaMarket system created by the eaMarket Administrator.

You can change the **Description**, **Content Type**, the **Click through URL** (which is the URL to transfer the user to if this promotion is clicked), and you can change the file used to make up this content.



Before you edit the content make sure that it is not already associated with a promotion. You cannot edit content that is already associated with a promotion.

## Categories

Before storing content in a library, you must create at least one category in the library that you plan to use. Create categories by opening a library. Open a library on the **Content** screen by clicking on **Open** on the library that you wish to use:

Content Libraries

Content Search

Promotion Search

Library

Content type

ALL

Category

File extension

Content name starts with

Description containing

Author (User)

Image size greater than

Kilo bytes and less than

Kilo bytes

Search

Reset

Add Content

Library	Description	Data store	
Cable	Content related to cable promotions	Primary	Open
Telephony	Content related to telephony promotions	Primary	Open

The following screen shows the **Categories** screen that is displayed by opening the *Cable* library:

The screenshot shows a web interface titled "Categories". Below the title is a header bar that says "Categories in library Cable". Underneath is a table with three columns: "Name", "Description", and an empty column for actions. The table contains three rows of category data. Each row has a red 'X' icon in the action column, indicating that categories can be deleted. At the bottom right of the screen is a yellow "Add" button.

Name	Description	
<u>Bottom Left Ads</u>	Promotions for lower left section of nav bar	X
<u>Top Left ads</u>	Promotions for upper left section of nav bar	X
<u>Top Message</u>	Message appearing at top of bill	X

Add

You can edit an existing category, or add a new one. Editing the category *Top Message* displays the following screen:

The screenshot shows a web interface titled "Edit Category". It contains two text input fields: "Name" with the value "Top Message" and "Description" with the value "Message appearing at top of bill". At the bottom of the screen are three yellow buttons: "Save", "Cancel", and "Help".

Name: Top Message

Description: Message appearing at top of bill

Save Cancel Help

Add categories based on the type of content you plan to place in a library. Content may be categorized by size, background color, or business requirements.

# Managing Business Conditions

# 5

## Business Conditions

Business conditions are named conditions defined by the eaDirect Composer for a particular application. A business condition creates an easy-to-remember name for a common condition, and also allows the same condition to be reused. Business conditions are saved in the eaDirect application logic (ALF) files.

eaMarket allows a new business condition to be created either based on an existing business condition, or by combining two existing business conditions. eaDirect also allows limited modification of an existing business condition.

Business conditions can be deleted using eaMarket, but that **permanently removes the business condition** from both eaMarket and eaDirect. Therefore, removing a business condition should be performed with caution.

As an alternative to deletion, a business condition can be **de-selected** from the section it has been associated with by using the business condition search options. The business condition search option is available when adding a promotion. De-selecting a business condition is safer than deleting it, since de-selection does not remove that business condition from the system completely.

Business conditions that were created or modified using eaMarket are only applied to the eaDirect server when a promotion is deployed to that application and view. This feature limits the communication with the eaDirect server, but also requires planning to implement changes to business conditions.

Importing an eaDirect application to eaMarket retrieves all information about that eaDirect application from the eaDirect server into the eaMarket database. This includes views, sections, business conditions, templates and existing section-to-business condition relationships. Importing overwrites any existing application information currently in the eaMarket database.



**Caution**

Importing an application from the eaDirect server after modifying business conditions in that application with eaMarket overwrites those business condition edits and deletions.

See the *eaDirect User Guide* for more information about business conditions.

## Managing Business Conditions

1. Clicking the **Business Conditions** button on the left navigation frame displays the following screen:

**Manage Business Conditions**

**STEP 1 Select an eaDirect Server**

eaDirect Servers: dusky

**STEP 2 Select an eaDirect Application**

Applications: Cab

**STEP 3 Select an eaDirect View**

Views: HtmlDetail

Continue Cancel Help

2. Select a server, an application on that server, a view from that application, and click on the **Continue** button.

3. The next screen lists the business conditions in that view:

**Manage Business Conditions**

**List of Business Conditions:**

- FirstStmntIndicator
- LastStmntIndicator
- CurrencyCharges
- BigSpender
- Central
- Western
- NegativeRed
- NegativefontRed

**Business Condition Description:**

The Business Condition FirstStmntIndicator applies if the FirstStmntIndicator field does not equal NULL

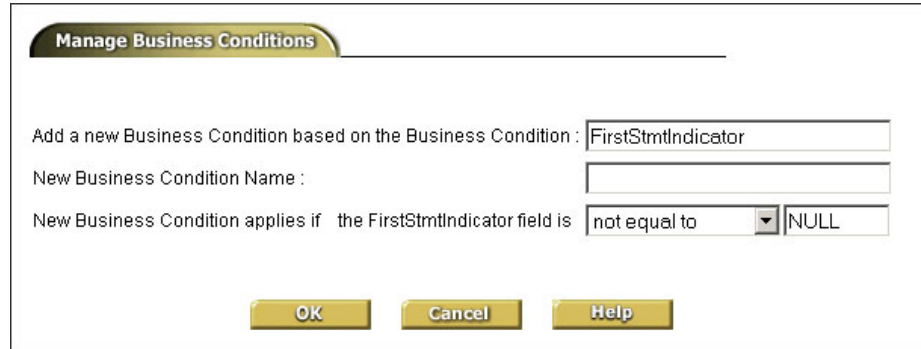
**Add** **Combine** **Edit** **Delete**

**Cancel** **Back** **Help**

4. Selecting a business condition causes a simple description of the condition to display in the **Business Condition Description** area. The next few sections describe how to use each button on this screen.

## Adding a New Business Condition

1. You can use an existing business condition to add a new business condition. Select a business condition to use as a template, then click on the **Add** button. A screen similar to the following appears:



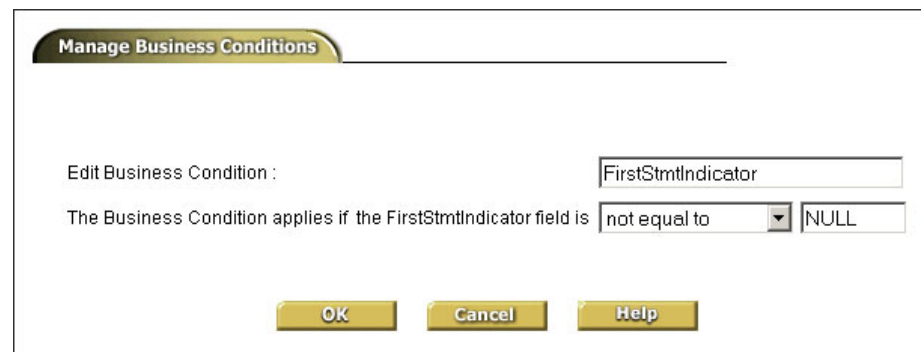
The screenshot shows a dialog box titled "Manage Business Conditions". It contains the following fields and controls:

- A label "Add a new Business Condition based on the Business Condition :" followed by a text input field containing "FirstStmntIndicator".
- A label "New Business Condition Name :" followed by an empty text input field.
- A label "New Business Condition applies if the FirstStmntIndicator field is" followed by a dropdown menu showing "not equal to" and a text input field containing "NULL".
- At the bottom, there are three buttons: "OK", "Cancel", and "Help".

2. You can modify the business condition parameters before saving the new business condition. You can change both the values to be compared or how the value is compared, but you cannot change which field the business condition uses to compare. For example, in the preceding screenshot, a new business condition is being created called *MediumSpender*, which applies if *CurrentCharges* is greater than or equal to 500.00.

## Editing an Existing Business Condition

1. If you click on the **Edit** button, you can edit the definition of the current business condition:



The screenshot shows the same "Manage Business Conditions" dialog box, but with the "Edit Business Condition" form active. It contains the following fields and controls:

- A label "Edit Business Condition :" followed by a text input field containing "FirstStmntIndicator".
- A label "The Business Condition applies if the FirstStmntIndicator field is" followed by a dropdown menu showing "not equal to" and a text input field containing "NULL".
- At the bottom, there are three buttons: "OK", "Cancel", and "Help".

Here you can change the definition of an existing business condition, which will be saved to the specified view of the application. You can either edit the value being compared (“200.00” in the above example), or how it is compared (greater than, less than or equal to, etc.).

## Combining Business Conditions to Create a New Business Condition

Select two business conditions and click on the **Combine** button. This example selected *Eastern* and *BigSpender* to create a new business condition, one that could be called *EastBigSpender*.

**Manage Business Conditions**

New Business Condition Name :

Add a new Business Condition based on the combination of the following two Business Conditions :

The Business Condition Applies If:  AND

## Deleting a Business Condition

If you click the **Delete** button in the Manage Business Conditions screen, you can delete a business condition definition from the application. Deleting a business condition removes it from the selected view. To disassociate a business condition from a section, manipulate the list of selected business conditions when adding a new promotion for that view.



### Caution

Deleting a business condition permanently removes it from eaMarket and eaDirect.

## Advanced Business Condition Management

In some cases, you may need to make more extensive changes to your business condition framework, such as changing or introducing new fields for comparisons. For these and other more advanced changes, work with your eaDirect administrative team. The eaDirect administrative team will help you define a new set of business conditions with the eaDirect Composer and import those business conditions into eaMarket.



### Workflow

Workflow monitors the status of promotion creation, review, and approval online. Workflow depends on the setup of groups and their privileges. Before you begin, work with your eaMarket system administrator to set up groups.

The workflow process begins with adding a promotion, then choosing the groups that will approve the promotion. Email is then sent to those groups indicating that they have a new promotion to approve. This notification includes a URL that takes the reviewer directly to the *Promotion Details* screen. If any reviewer disapproves, an email notification is immediately sent to the originator.

The originator should monitor the promotions to ensure that they are approved on time. The **Workflow** tab on the **Promotion Details** screen shows who has completed their review, and any comments they have entered. It is **critical** that all those designated to review the promotions do so **prior to** the deployment date, because the promotion will not be deployed unless all reviewers have approved the promotion.

The following business rules govern the approval process:

- If everyone approves before the deadline, the promotion is deployed.
- If anyone in the group disapproves for any reason, the promotion is not deployed.
- If any reviewer fails to respond before the promotion is scheduled to be deployed, the lack of response is considered a disapproval and thus the promotion is not deployed.

In some cases, promotion approvals must be routed through more than one approval stage. All reviewers at one stage must approve a promotion before eaMarket seeks the approval of the next stage. In this manner, higher-level reviewers do not have to approve a promotion until later in the process.

Your eaMarket administrator can define a default list of groups that must approve any promotion. The default list of groups may specify approval stages. In addition to the default list, the author of a promotion may choose to add other optional groups to stages of the default approval chain. eaMarket maintains a separate default approval list for each application imported from eaDirect.

During the workflow process, eaMarket can also notify groups when a promotion is under review without requiring their explicit approval to deploy the promotion. These groups are known as *observers*. Observers may offer comments on a promotion that may be viewed by all involved in the approval workflow, but eaMarket does not require observers to approve or disapprove the promotion's deployment.



**Tip**

Consider the following when assigning groups and deadlines to promotions:

Allow sufficient time for groups to review, as well as time for you to make updates based on their comments.

Volume – consider how many promotions are deployed and who is reviewing them. You may not want to send all promotions to all groups.

Schedule – consider how many promotions are due around the same time.

## Reviewing a Promotion

1. Click on the URL in your email notification to go to the promotion details screen.

Or

Click the  button from the menu on the left side:

2. The main **Workflow** screen displays:

Workflow

Promotion name starts with

From date

Author

To date

Library

Sort by

Name A - Z

Status

All

Search

Reset

Promotion Name	Status
<a href="#">BigSpender Upgrade</a>	Reviewing
<a href="#">Upgrade to silver</a>	Reviewing

3. You can either search for the promotion for which you wish to create a workflow, or click on a currently displayed **Promotion Name** to go to the promotion details screen.


Status can be:

- *Created* - The promotion has been created, and email may have been sent, but nobody has looked at it.
- *Reviewing* - The promotion is in the review process, but has not been looked at by all who are required to review it.
- *Approved* - The promotion has been reviewed and approved by all.
- *Disapproved* - The promotion has not been approved.
- *Deployed* - The promotion is active.

**Promotion Details**

**Natural Language Viewer**  
We will use the content Upgrade to gold with the promotion Upgrade to silver from 01 Dec 2001 to 01 Mar 2002

**Content**




Title	Upgrade to silver
Author	JED
Submitted Date	2001-11-13 15:56:27

[Preview in Bill](#)

**Approve** **Workflow**

Please Enter any Comments



Do you want to Approve?

[Approve](#)

[Disapprove](#)

4. Click the **Preview Bill** button to see what your bill will look like.
5. Click the **Approve** or **Disapprove** button, optionally entering comments about this promotion.



**Caution**


If you decide not to approve or disapprove once you get to this screen, please **do not** use the browser Back button to exit. Use one of the buttons on the eaMarket navigation panel. That will ensure proper tracking of the workflow in eaMarket.



Once you have submitted your comments and approved or disapproved the promotion, the approval process records your comments and continues with the other reviewers. Therefore, it is important for you to double-check your comments before submitting them, because you cannot edit them after approving or disapproving the promotion.

## Viewing Promotion Details And Status

1. Click on the **Workflow** tab, which displays a screen similar to the following:

Approve		Workflow			
Stage	User	Type	Status	Date	Comments
0	JED	Creator	Created	2001-11-13 15:56:27	
1	BARRY	Approver	Approved	2001-11-13 15:57:13	
2	BECCA	Approver	Posted	2001-11-13 15:56:27	
2	RWALL	Observer	Posted	2001-11-13 15:56:27	
2	MWATTS	Observer	Posted	2001-11-13 15:56:27	
3	TFORCIER	Approver	To be Posted	2001-11-13 15:56:27	
4	TMORGAN	Approver	To be Posted	2001-11-13 15:56:27	
4	JPATTERSON	Approver	To be Posted	2001-11-13 15:56:27	

2. If a reviewer added comments, a magnifying glass icon is displayed in the **Comments** column. Clicking on the icon displays the comments.



# Monitoring Promotions



After you launch a promotion, you will want to watch its performance over some period, and then make decisions based on that performance. eaMarket provides the following tools for monitoring the visibility and success of your promotion:

- Schedule
- Performance
- Dash Board

These tools help you answer questions such as:

- How did the performance of a promotion compare when placed in different sections?
- Was the promotion more successful on certain days of the week?
- Do different profile groups respond to certain sections better?



## Caution

You cannot make changes to a deployed promotion to effect an immediate change based on performance observations. If a deployed promotion is edited in any manner or the content changes, the promotion changes to the **created** stage, and will need approval again from the approvers.

## Schedule

By clicking on *Schedule*, you can view all of your promotions and their deployment schedules side by side.

**Schedule** provides a graphical representation of all your promotions' schedules for ease of viewing. Use this view when planning and forecasting or to check that your promotion schedules are accurately reflected in eaMarket.

**To view all promotion schedules:**

1. Click the **Schedule** button. The **Promotion Schedule** screen displays:

Promotion Schedule

for

or from :

to :

Show Schedule

Show Performance

Year	2001									
Month	11									12
Week	5	1	2							
Day of Month	30	1	2	3	4	5	6	7	8	
Promotions										
<a href="#">BigSpender Upgrade</a>										
<a href="#">Upgrade to silver</a>										

Currently Deployed Promotions

Other Promotions

Help




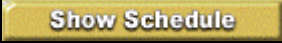

- Click the drop down arrow adjacent to **for**, and select the number of days.

The screenshot shows a web form titled "Promotion Schedule". It contains a section with a "for" label, a dropdown menu, and an "or" label. The dropdown menu is open, showing four options: "Last 5 days", "Last 30 days", "Next 5 days", and "Next 30 days". Below this section is a table with the following rows:

Year	
Month	
Week	
Day of Month	27   28
Promotions	

or

Click on the  button next to **from:** and **to:** text boxes to select a date range.

- Click  button to view a list of scheduled promotions.
- You can jump quickly to a side-by-side performance evaluation of the promotions that you've selected. Click the  button to view the scheduled promotions along with the number of clicks and impressions.

## Performance

Evaluating the performance of your promotions represents the third stage of the promotion life cycle process. It is from these pages that you can generate graphical analyses of promotions from a campaign when performing your post-deployment evaluations. By comparing promotions from different time periods, with different content, or targeting different customers, you can determine which promotions are more effective and fine-tune your marketing campaign's approach to converting a higher yield of customers to your promotional messages and offerings.

View the performance to get statistical data and graphical comparisons of the performance of your promotions. The performance measures provided are:

- **Impressions** – The number of times the promotion was viewed.
- **Clicks** – A subset of impressions and show the number of times the promotion was clicked.
- **Yield** – is the ratio of clicks to impressions. For example, 25 clicks and 100 impressions show a yield of 25%.

The **Performance** button displays a screen from which you can search for the promotions that you wish to compare:

Performance

for  or from : 2003-02-08 to : 2003-03-10

Show Schedule Show Performance

<input type="checkbox"/>	Promotion Name	Start Date	End Date	Clicks	Impressions	Section Name	Business Condition	Content Name
<input type="checkbox"/>	lga_test	2003-03-05	2003-03-05	0	0	TopLeftNav	Central	lga

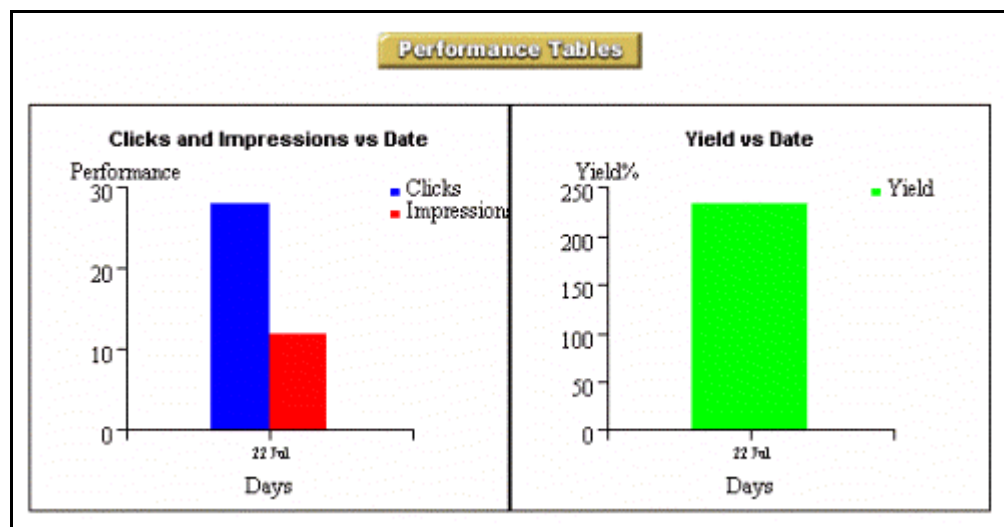
Click the particular type of Chart, to Compare the performance of selected promotions:

Line

Help

Enter the dates for which you wish to search for promotions. The **from:** drop-down list allows you to select a range of past or future days for scheduled promotions.

Select the promotions you wish to compare, and click the Show Performance button. A screen similar to the following will display:



## Dash Board

The Dash Board displays real-time statistical information about your promotions, including:

- List of live (deployed) promotions
- List of scheduled promotions
- Two most watched promotions (high Impressions)

- Two most used promotions (high Clicks)

Promotions displayed in the dash board have two categories:

- **Promotions**
- **Facts**

The *Promotions* category has two sub-categories:

- **Live** - Promotions which are deployed. By default, live promotions are displayed sorted alphabetically.
- **Scheduled** - Promotions which are to be deployed in the future. By default, promotions are displayed sorted alphabetically.

The *Facts* category has two sub-categories:

- **Most Watched** - By default, promotions will be displayed based on the number of Impressions recorded.
- **Most Used** - By default, promotions will be displayed based on the number of clicks recorded.

The Dash Board displays both deployed and live promotions. Any user with the **View Dash Board** privilege can view the Dash Board, and sees the number of promotions for that user. The Dash Board displays promotions from all eaMarket servers.

#### To launch the Dash Board:

1. Click the  button. The Dash Board screen displays:

edocs <sup>®</sup> eaMarket <sup>™</sup>	
SUMMARY	
PROMOTIONS	
LIVE	
SCHEDULED	
FACTS	
Most Watched	Views
▶ Upgrade	0
▶ BigSpend	0
Most Used	Clicks
▶ Upgrade	0
▶ BigSpend	0

- Click on the promotion name (under Most Watched or Most Used) to jump to that promotion's Performance Details page:

Performance Details

for

or from: 2001-12-01

to: 2002-03-01

Show Schedule


Show Performance

Upgrade to silver

Start Date: 2001-12-01

Status: Reviewing

Edit



Click Here to upgrade your purchasing power

Date	Click	Impressions	Yield
Click the particular type of Chart, to view the performance :			
 Bar	 Line		

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