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PeopleSoft Enterprise CRM 9.1 Event Management PeopleBook

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PeopleSoft Enterprise CRM 9.1 Event Management PeopleBook
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Contents

PeopleSoft Event Management Preface

This preface discusses:

- PeopleSoft CRM application fundamentals.
- PeopleSoft CRM automation and configuration tools.
- PeopleSoft CRM business object management.
- PeopleSoft CRM product and item management.
- PeopleTools PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews.

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook

PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management.

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools.

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration Tools.

  This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge Management.

  This part discusses the setup of Verity search.

- Business process management.

  This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

  - The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
  - The setup and execution of business projects.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics.

  This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

  This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

  This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

  This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

  This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook

PeopleSoft Enterprise CRM Product and Item Management

The *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft Enterprise CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.50 PeopleBooks.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Chapter 1

Getting Started With Event Management

This chapter provides an overview of PeopleSoft Enterprise Event Management and discusses:

- PeopleSoft Event Management business processes.
- PeopleSoft Event Management integrations.
- PeopleSoft Event Management implementation.

PeopleSoft Event Management Overview

PeopleSoft Event Management is a complete solution for planning and executing a wide range of virtual and in person events, from seminars, job fairs, open houses and conferences to webinars. In addition, PeopleSoft Event Management with Online Marketing provides a full featured self-service solution supporting online registration, venue capacity checking, wait listing, early bird pricing, and credit card integration.

PeopleSoft Event Management provides the following benefits:

- Manage event costs and ROI by reducing event support costs through automated approval workflow and online registration, wait listing and credit card payments.
- Provide real time updates of event information for accurate and timely responses: event statuses (registered, waitlisted, declined) are updated in real time from the self-service pages for accurate communication to event participants.
- Measure event success and drive follow up actions: maximize event success by leveraging OLM surveys for retention, automated lead creation for Recruiting and out-of-the-box metrics for event analysis.

PeopleSoft Event Management provides the tools you need to deliver successful events, from start to finish: Planning, Invitation and Registration, Execution, and Analysis and Follow-Up.

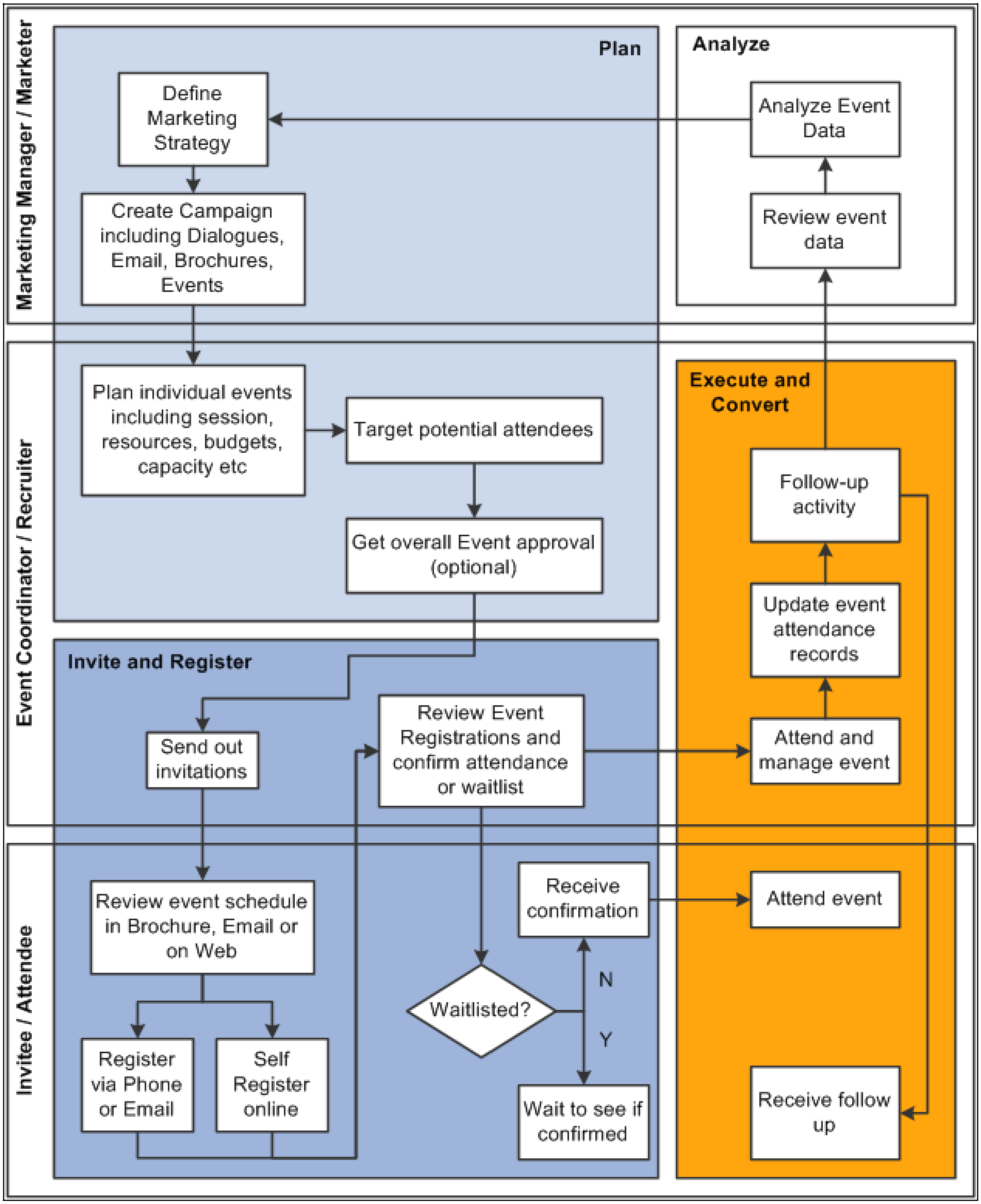
Event Management Business Process

The event management business process consists of four process steps:

- Plan.
- Invite and Register.
- Execute and Convert.

- Analyze.

The following graphic shows the event management business process, detailing the steps that occur during the planning phase, the invite and register phase, the execute and convert phase, and the analysis phase. The people and functions who perform each task are shown.



Event Management business process

The PeopleSoft Event Management PeopleBook is organized according to these business process steps.

Plan

In the Plan step, marketing managers and marketers formulate a plan to address the business opportunities and challenges that includes events. They determine the goals, collaborates with all the people and organizations that would be involved with the planning and execution of the event, and set up and manage the resources necessary to implement the event. These include setting budgets, obtaining approvals, defining event agendas, and organizing venues.

Begin by establishing the event basics like the event name; important dates like start, end and RSVP date; venue and capacity; event owner and whether the event is private or public.

An event can be a part of a larger marketing campaign. For example, a universitys undergraduate student recruiting campaign might include web advertisements, multiple open house events, and postcards. Event Management provides the ability to link the event to a marketing campaign, specifically a roll up program, so that the high level budgets, costs, and metrics can be rolled up from all related programs and events and be viewed for the overall campaign.

Additionally, marketers can link any number of events that are related to this event (for example, if an open house is repeated on different days in different locations). They can display the related events as part of the self-registration process so that participants can sign up for similar events if they are not able to register for their first choice.

The marketer can define financial data for the event including budgets, planned and actual costs and event registration fees, including date based pricing such as early bird pricing. During the online self-registration process, the current price for the event is determined in real time.

After they have defined the high level detail for an event (budget, venue, and so on), marketers can submit it for approval prior to defining the rest of the event details. They do this by setting the event status to *In Review.* Doing this triggers an email or worklist entry to the event approver, who reviews the event and then sets the status to *Approved.* Additional data that can be set up at the event level includes resources (such as projectors and speakers), tasks, costs, notes, and metrics.

Marketers can also define multiple sessions for events along with a capacity and number attended for each session. They can define specific costs, metrics, notes, team members, and resources at the session level, allowing for more detailed tracking of popular sessions.

Further, they can target events to a specific list of participants. Event Management provides the ability to segment prospect, customer, and employee data to build the right audience for the event. Marketers can build the participant list both from audiences and by manually adding participantsthe system automatically deduplicates the participants so that the event invitation is not sent to the same person twice.

Invite and Register

In the Invite and Register step, the event coordinator sends out the invitations using both inbound and outbound channels (such as phone, email, direct mail, call center, website, and fax). The Registration process step provides event coordinators and invitees the methods to capture registration information.

When sending the event invitation using email or the web, event coordinators can direct the recipient to an online registration page where he can register, decline, be waitlisted, or sign up for a future event. The online responses automatically update the registration status for the recipient within PeopleSoft Event Management, and the response date and time are updated to help determine whom to remove from the waitlist when space becomes available. In conjunction with Online Marketing, reminders can be sent to invitees using SMS and email.

During the registration process, Event Management determines the event price in real time and can take credit card payments (for event registration or donations) and display the payment transaction history.

Event coordinators can display related events as part of the self-registration process so that participants can sign up for similar events if they are not able to register for this particular event or if the capacity for this event is exceeded. As the responses are updated automatically, the coordinator can view in real time all the participants and their current response status for the event, as well as participant counts.

Note. In order to invite participants using email or to perform online registration, you must license PeopleSoft Online Marketing.

Execute and Convert

The Execute/Convert step provides event coordinators the ability to capture attendance and no-show information, self-service check-in (requires Online Marketing), and reports and lists of attendees for each event session.

After the event actually takes place, the attended or no-show field can be updated and any new prospects and leads can be added to the system. Event coordinators can convert event success to action, leveraging event participant lists for the automated creation of leads, telesales campaigns, and follow-up communications, as well as leveraging integrated surveying tools of Online Marketing to survey invitees and attendees to identify future event interest and improve events for the future.

Analyze

The Analyze and Measure step reports on the effectiveness of the event planning and execution process. Event Management provides a number of different metrics to help event coordinators analyze how successful the event was in terms of revenue (for a fundraising event), leads and opportunities generated (for a recruiting event), attendance rates (for a seminar), and more.

PeopleSoft Event Management Integrations

PeopleSoft Online Marketing integrates with PeopleSoft Online Marketing and PeopleSoft Marketing.

We discuss integration considerations in the implementation chapters of this PeopleBook.

Supplemental information about third-party application integrations is located on the My Oracle Support website.

PeopleSoft Marketing

PeopleSoft Event Management integrates with PeopleSoft Marketing: for example, Audience Builder and Campaign Management. Marketing is a prerequisite and required for using Event Management.

PeopleSoft Online Marketing

PeopleSoft Online Marketing enables the email and web communications required for inviting attendees to your event, as well as event reminder and follow-up communications and actions, and the online registration capabilities. Online Marketing is recommended to enable the full business process for Event Management.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "PeopleSoft Enterprise Online Marketing Preface."

PeopleSoft Event Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleSoft documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook,PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook,* and *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook* with information on where to find the most up-to-date version of each.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Setup Manager

Chapter 2

Planning Events

This chapter provides an overview of planning events, and includes the following sections:

- Setting Up the Event.
- Defining Sessions.
- Defining the Team.
- Defining Tasks.
- Defining Costs.
- Defining Participants.

Setting Up the Event

This section describes how to set up an event. It discusses the following topics:

- Creating a New Event.
- Defining the Event Details.
- Defining Event Financials.
- Cloning an Event.

Pages Used to Set Up Events

Page Name	*Definition Name*	*Navigation*	*Usage*
Marketing Programs	RA_PROGRAM_ADD	Marketing, Marketing Programs Click the Add Program button.	Add a new Marketing Program.
Event Detail	RAE_EVENT_DETAIL	Marketing, Marketing Programs Click the Add Program button at the bottom of the page.	Define event details.

Page Name	*Definition Name*	*Navigation*	*Usage*
Event Finances	RAE_EVENT_DETAIL	Click the Financial link on the Event Detail page.	Define financial information about the event.
Event - Sessions	RAE_EVENT_SESSIONS	Click the Sessions tab.	Define event sessions.
Event - Team	RAE_EVT_TEAM	Click the Team tab.	Define team members for the event.
Event - Resources	RAE_EVENT_RESOURC	Click the Resources tab.	Define resources for the event.
Task Details	RB_TSK	Click the Tasks tab, then click the name of a task.	Define tasks for the event.
Event - Costs	RAE_EVENT_COSTS	Click the Costs tab.	Define costs related to the event.
Event - Notes	RAE_EVENT_NOTES	Click the Notes tab.	Define notes related to the event.
Event - Participants	RAE_EVENT_REGISTR	Click the Participants tab.	Define information about event participants.

Understanding Event Setup

An Event is a type of Marketing Program that provides functionality specific to Event Management business processes. It is created using the Program Type Event, which appears in the Marketing Programs list along with the Campaign, Roll Up, and Dialog program types. The Event program type allows the event to be associated with a roll up program for rolling up budgets and costs to a higher level, along with other program types such as Campaign for a telesales or mass mailing program or Dialog for an online marketing program.

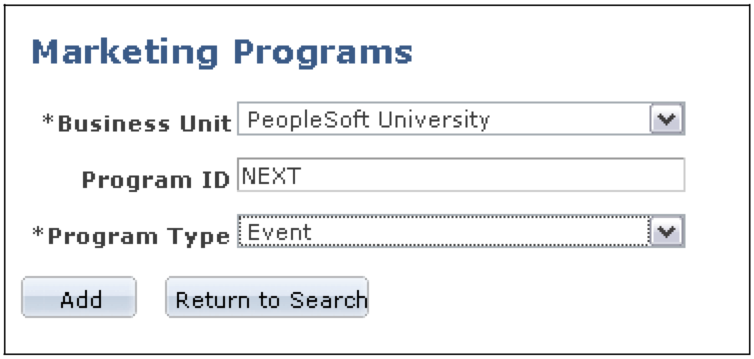
When you define an event, you define various information about it, including:

- Event details, such as start and end date, event capacity, venue, and other descriptive information about the event.
- Event financial information, including details about the event sponsor and budget, and a breakdown of the costs associated with the event.

After you have defined the overall information about the event itself, you can define the details of the event's individual sessions, the team members and roles associated with it, the tasks that must be completed, the associated costs, and the event participants.

Creating a New Event

Access the Marketing Programs page (Marketing, Marketing Programs, click the Add Program button).



Marketing Programs page

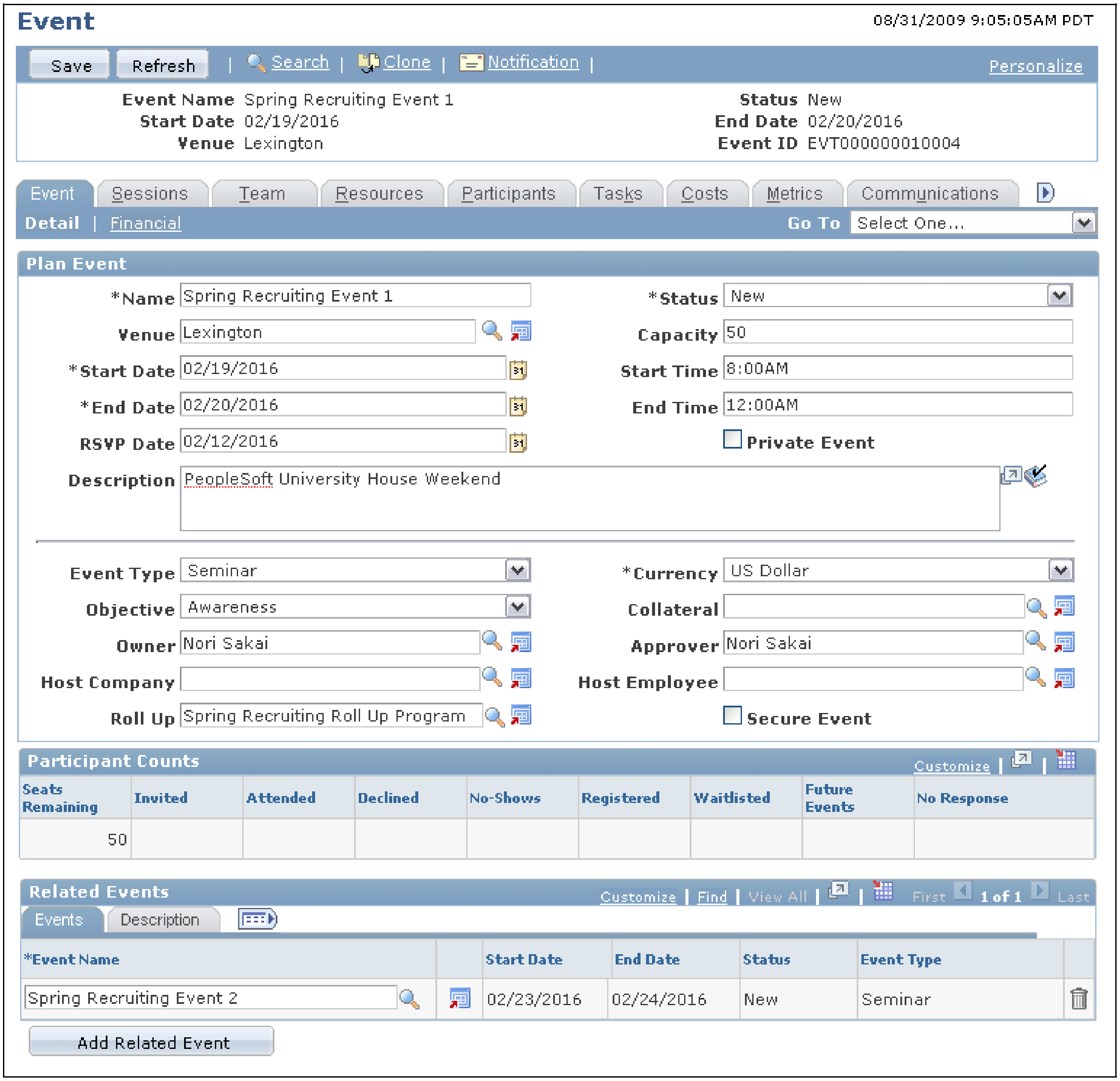
Business Unit Select the business unit for which you want to create the event.

Program ID By default, this value is NEXT for a new event. The event will be assigned the next available Program ID when you save.

Program Type Select *Event* from the list of available choices.

Defining the Event Details

Access the Event page (Marketing, Marketing Programs, select an Event from the list or create a new Event).



Plan Event page

Name Enter a name for the event. Event names must be unique within a business unit.

Status

Select a status from the list of choices. For a new event, the status is *New* by default. Other statuses include:

- *In Review*: The event has been submitted for approval.
- *Declined*: The event has not been approved.
- *Approved*: The event has been approved and is ready for execution.
- *Executing*: The event is currently being executed.
- *Completed*: The event is complete. When the event is in this status, all of its main fields are read-only.
- *Stop*: The event has been put on hold or canceled (you can use the Notes section to provide details).

Note. You can define your own Status values using the Status Rules page in PeopleSoft Marketing. Refer to the Marketing documentation for more information.

Venue

Click the icon to search and then select a venue from the available list.

Capacity

Enter the maximum number of attendees who can attend the event. This value is used to determine whether a person registering for the event will be waitlisted if the number registered exceeds the Capacity.

If the event's Capacity increases and there are waitlisted participants, a message displays to inform you that you should review the waitlisted participants. If the Capacity decreases and the number of registrants exceeds the new capacity, a message displays to inform you to review the participant list.

Start Date, Start Time

The time and date when the event begins.

End Date, End Time

The time and date when the event ends. The End Date cannot be earlier than the Start Date.

RSVP Date

The date by which prospective registrants must respond to the invitation. This date cannot be greater than the End Date value, but it can be later than the Start Date.

Private Event

Select this check box if the event is private. If the check box is not selected, then the event is public.

Event Type

Select an event type from the list of choices. The available choices are *Auction*, *Break*,*Benefit*,*Breakfast*,*Conference*,*Conference Call*,*Demonstration*,*Dinner*, *Drinks*,*Entertainment*,*Fundraiser*,*Keynote*,*Lecture*,*Lunch*,*Meeting*,*Panel*, *Presentation*,*Recreation*,*Seminar*,*Tradeshow*,*Workshop*, and *VIP Event.*

This value is for informational purposes only; the choice does not change what is displayed on the Event Definition pages.

Currency

Select the default currency for the event from the list of choices.

Objective

Select an objective for the event (such as Recruiting, Fundraising, and so on). Refer to the Marketing documentation for more detailed information about objectives.

Note. You can define your own objectives using the Marketing Objectives page in PeopleSoft Marketing. Refer to the Marketing documentation for more information.

Collateral

Click the icon and select marketing collateral to associate with the event, if relevant.

Owner

Click the icon and select an owner for the event from the available list. The default is the person who created the event. The event owner is leveraged in the event approval workflow process.

Approver

Click the icon and select the person who must approve the event. The event approver is leveraged in the event approval workflow process.

Host Company

Click the icon and select the name of the company that is hosting the event.

Host Employee

Click the icon and select the name of the employee who is hosting the event. The Host Employee does not have to be a member of the Host Company.

Roll Up (Campaign)

Select the name of the roll up to which this event is to be associated.

Secure Event

Select this check box to restrict access and visibility to the event. When an event is secured, users will be unable to access it unless they are a team member or part of a team role that has been associated with the event. Secure Event uses the same security framework used to secure online dialogs and audiences.

Participant Counts

This section displays information about the event's participants. It is read-only, and is updated when the main Event Detail page is updated. It includes:

- *Seats Remaining*: The event's Capacity minus the number registered.
- *Invited*: The total number of people invited to the event.
- *Registered*: The total number of invitees who have accepted the event invitation (that is, registered for the event). This total also includes anyone who has registered but was not invited.
- *Declined*: The total number of invitees who have declined the event.
- *Waitlisted*: The number of attendees who have agreed to be waitlisted for the event.
- *Attended*: The total number of people who actually attended the event (including those who were not invited but who showed up anyway).
- *No-Shows*: The number of people whose attendance is set to No on the participant list.
- *Future Events*: The number of invitees who have requested to be notified about future events.
- *No Response*: The number of invitees who did not respond to the invitation.

Related Events

This section contains references to events that are similar in nature to the current event. This enables the event marketer or support analyst to recommend future events to anyone who cannot attend the current event or who was placed on a waiting list. Related events can also be displayed on the online Event Registration page.

- *Event Name*: Click the icon to display a list of related events.
- *Start Date*: The start date of the selected event. This value is read-only.
- *End Date*: The end date of the selected event. This value is read-only.
- *Status*: The status of the selected event. This value is read-only.
- *Event Type*: The event type of the selected event. This value is read-only.
- *Description*: The description of the selected event. This value is read-only.

Event Workflow

The following table shows the workflow actions for events based on a change in the event status.

Event Status Change	*Action Name*	*Role Name*
Changed to In Review	Worklist to Approver	Approver
	Email to Approver	Approver

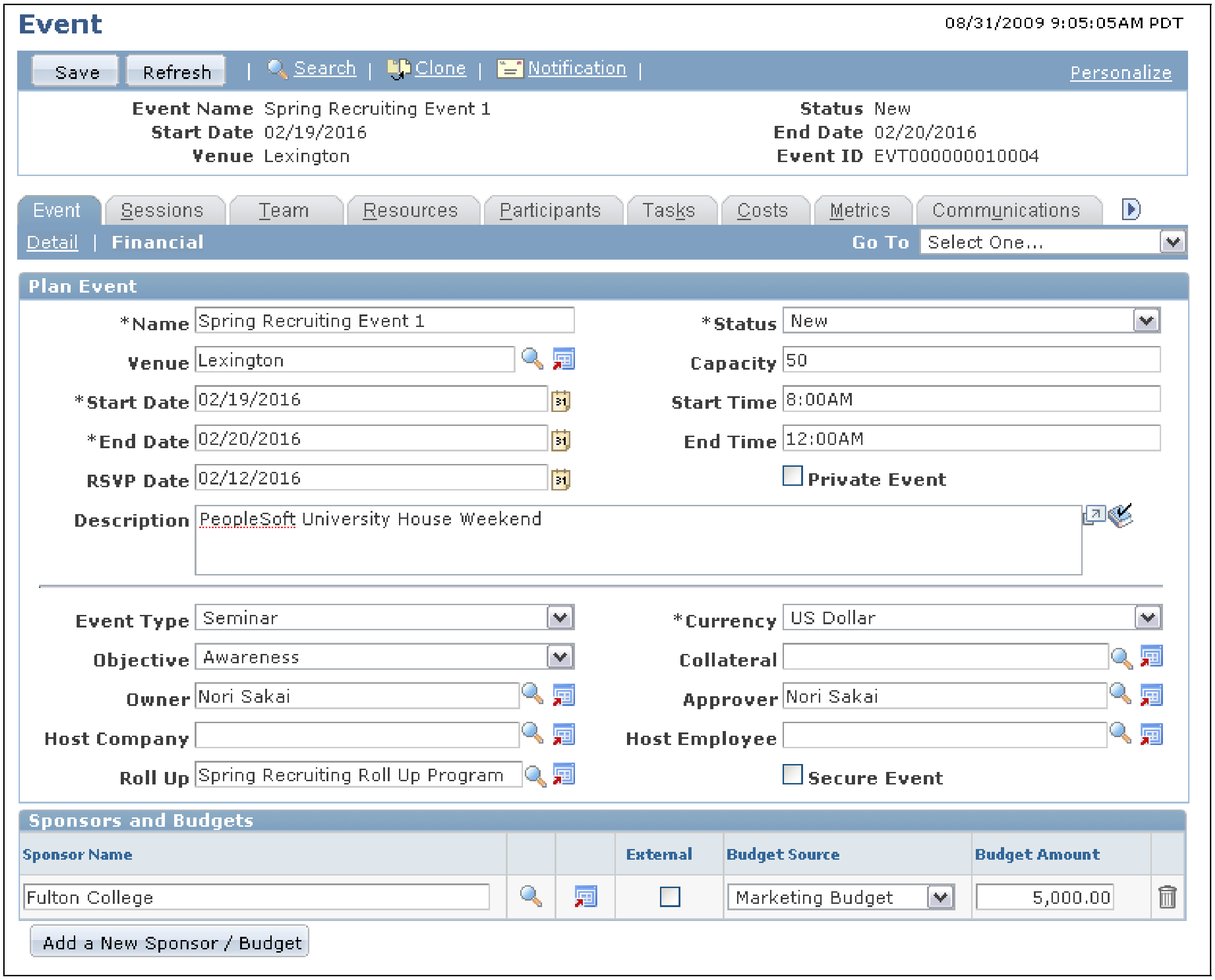
Event Status Change	***Action Name***	***Role Name***
Changed to Approved.	Worklist to Event Owner	Owner
	Email to Event Owner	Owner
Changed to Declined	Worklist to Event Owner	Owner
	Email to Event Owner	Owner
Changed to Stopped	Worklist to Event Owner	Owner
	Email to Event Owner	Owner

See Also

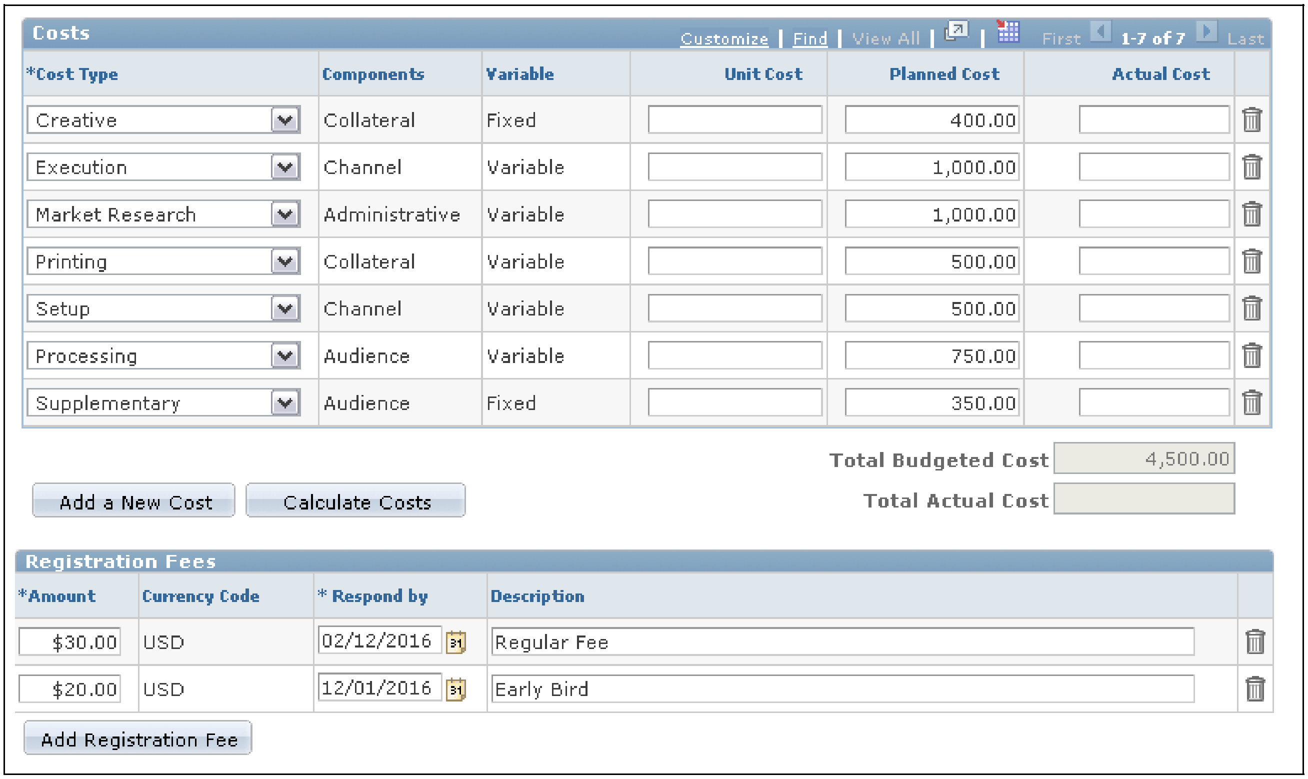
PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook, "PeopleSoft Enterprise Marketing Applications Preface"

Defining Event Finances

Access the Event Finances page (click the Financial link on the Events page).



Plan Event page, Financial section (1 of 2)



Costs — Customize | Find | View All | First 1-7 of 7 Last

*Cost Type	Components	Variable	Unit Cost	Planned Cost	Actual Cost
Creative	Collateral	Fixed		400.00	
Execution	Channel	Variable		1,000.00	
Market Research	Administrative	Variable		1,000.00	
Printing	Collateral	Variable		500.00	
Setup	Channel	Variable		500.00	
Processing	Audience	Variable		750.00	
Supplementary	Audience	Fixed		350.00	

Total Budgeted Cost 4,500.00

Add a New Cost | Calculate Costs | Total Actual Cost

Registration Fees

*Amount	Currency Code	* Respond by	Description
$30.00	USD	02/12/2016	Regular Fee
$20.00	USD	12/01/2016	Early Bird

Add Registration Fee

Plan Event page, Financial section (2 of 2)

Sponsors and Budgets

This section is a common sub page used by marketing campaigns, marketing roll ups, and the Dialog Designer if the dialog was created using the Marketing Programs page.

- *Sponsor Name*: Click the icon and select a sponsor from the list of available choices. Note that the sponsor name is required for all but one record in the listin other words, you can include one budget record that does not include a sponsor name, but all others must include one.
- *External*: Select this check box to allow external viewing, or leave it cleared to specify internal viewing only.
- *Budget Source*: Click the icon and select a budget source from the available list.
- *Budget Amount*: Enter a budget amount. Note that the amount entered is included with and edited against any budgeted amount specified for an associated roll up.

Record Program Costs

This section is a common sub page used by marketing campaigns, marketing roll ups, and the Dialog Designer if the dialog was created using the Marketing Programs page.

- *Cost Type*: Select a cost type from the list of choices.
- *Component*: This value is based on the Cost Type, and is read-only.
- *Variable*: This value is based on the Cost Type, and is read-only.
- *Currency*: The currency code that was specified in the Currency field in the Detail section.
- *Unit Cost*: Enter a unit cost for the budget item.
- *Planned Cost*: Enter the anticipated cost of the budget item. This amount cannot be a negative value.
- *Actual Cost*: Enter the actual cost of the budget item. This amount cannot be a negative value.
- *Totals*: The totals of all the Actual Cost values and the Planned Cost values.
- *Calculate*: Click this button to calculate the Totals fields.
- *Add a New Cost*: Click this button to add a new cost to the list.

Registration Fees

This section contains an amount and a respond-by date. Typically, an event includes a promotional or Early Bird fee in order to encourage invitees to sign up early for an event. If payment is received on or before the respond-by date, then the special fee takes effect. If the event start is after the last respond-by date, the system uses the most recent fee as the walk in fee.

- *Amount*: Enter the amount of the fee. The currency is determined by what was specified in the Currency Code field on the Event Detail page.
- *Currency*: This value is read-only and is taken from the Currency Code field on the Event Detail page.
- *Respond By*: The final date to which the fee in the Amount field applies.
- *Description*: *(Optional)* Enter any explanation you want to include pertaining to the fee.

Cloning an Event

When an event is cloned (using the Clone link in the Toolbar), the dates associated with the event are not cloned. These include dates relating to:

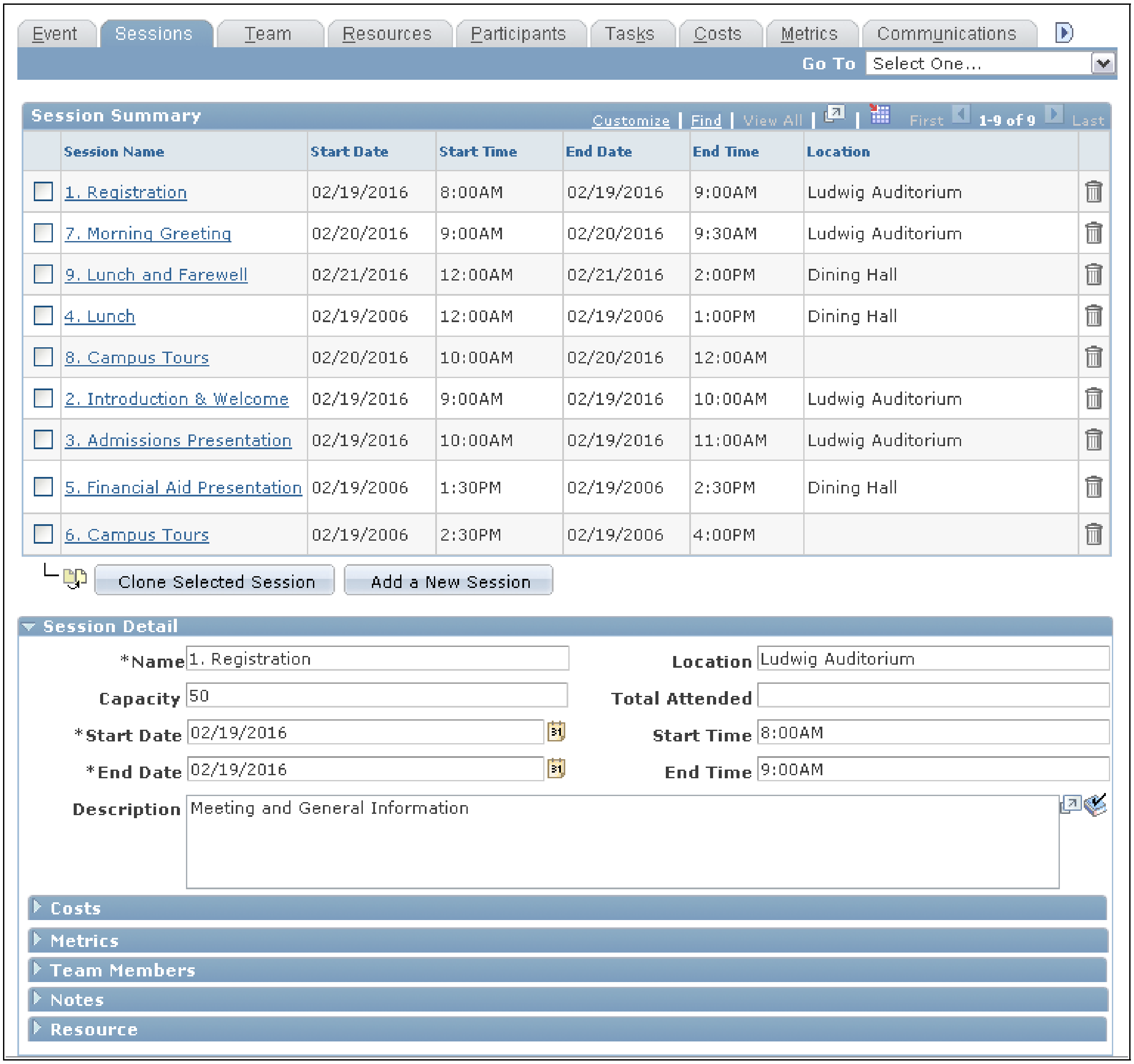
- Event.
- Session.

- Fees.

After the event has been cloned, you must enter dates for these items.

Defining Event Sessions

Access the Event - Sessions page (Click the Sessions tab).


Event | Sessions | Team | Resources | Participants | Tasks | Costs | Metrics | Communications

Go To Select One...

Session Summary — Customize | Find | View All | First 1-9 of 9 Last

	Session Name	Start Date	Start Time	End Date	End Time	Location	
	1. Registration	02/19/2016	8:00AM	02/19/2016	9:00AM	Ludwig Auditorium	
	7. Morning Greeting	02/20/2016	9:00AM	02/20/2016	9:30AM	Ludwig Auditorium	
	9. Lunch and Farewell	02/21/2016	12:00AM	02/21/2016	2:00PM	Dining Hall	
	4. Lunch	02/19/2006	12:00AM	02/19/2006	1:00PM	Dining Hall	
	8. Campus Tours	02/20/2016	10:00AM	02/20/2016	12:00AM		
	2. Introduction & Welcome	02/19/2016	9:00AM	02/19/2016	10:00AM	Ludwig Auditorium	
	3. Admissions Presentation	02/19/2016	10:00AM	02/19/2016	11:00AM	Ludwig Auditorium	
	5. Financial Aid Presentation	02/19/2006	1:30PM	02/19/2006	2:30PM	Dining Hall	
	6. Campus Tours	02/19/2006	2:30PM	02/19/2006	4:00PM		

Clone Selected Session | Add a New Session

Session Detail

*Name 1. Registration | Location Ludwig Auditorium

Capacity 50 | Total Attended

*Start Date 02/19/2016 | Start Time 8:00AM

*End Date 02/19/2016 | End Time 9:00AM

Description Meeting and General Information

Costs

Metrics

Team Members

Notes

Resource

Event - Sessions page

Click the Sessions tab to show all sessions for this event. Sessions are a series of smaller events within the main event. For example, for an Open House event, sessions could define the agenda for the day (9-10 a.m., Overview of Institution; 10-11 a.m., Overview of Arts program, and so on). You can define multiple sessions for any event and each session can have its own resources (external speaker, projector, and so forth) associated with it. When you first display the Sessions page, several of its sections are collapsed.

Note. Every event must have a minimum of one session. If you create an event without defining a session for it, a default session with the same start and end date values as the event itself is created with it.

Session Summary

The Session Summary section provides an overview of the event's sessions, including name, start date and time, end date and time, and location. All of these items are described in more detail in the Session Detail section.

Selection Check Box	Select one or more check boxes to include a selected session for cloning.
Clone Selected Session	Click this button to clone the selected sessions. Session information as well as Costs, Metrics, and Team Members will be cloned.
Add a New Session	Click this button to add a new empty session.

Session Detail

This section provides a more detailed view of the event's sessions. To display information about a particular session, click its name in the Session Summary section.

Name	Enter the name of the session. This value is required.
Location	Enter the location of the session.
Capacity	Enter the capacity of the session's location.
Attended	Enter the number of people who attended the session.
Start Date, Start Time	Enter the starting date and time of the session. The Start Date value is required.
End Date, End Time	Enter the ending date and time of the session. The End Date value is required.
Description	Enter any defining information or particulars that need to be included for further clarification about the session.

Other Sections

The remaining sections on the page allow you to associate resources with the selected session (as opposed to the entire event).

Costs Use this section to associate costs with a specific session of the event.

Metrics Use this section to associate metrics (such as session attendance rate or cost per attendee) with a specific session of the event.

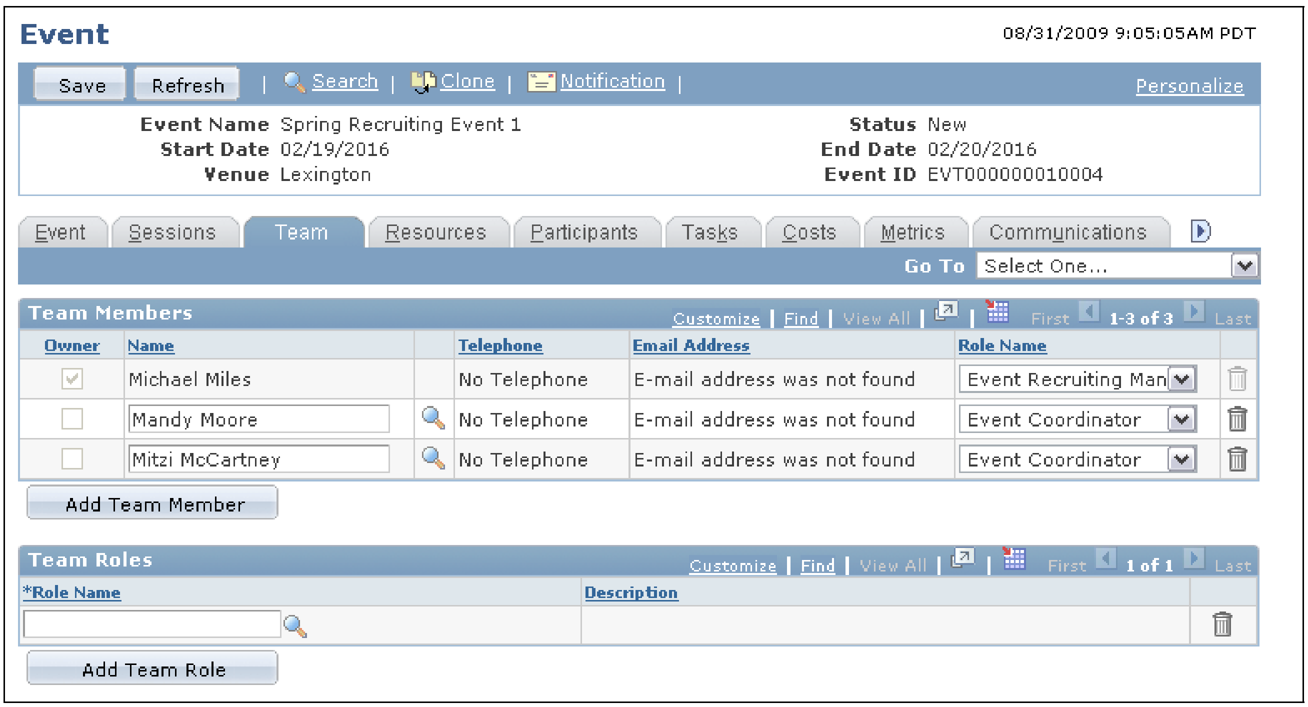
Team Members Use this section to associate team members with a specific session of the event.

Notes Use this section to attach a note to a specific session of the event.

Resource Use this section to associate other resources (such as collateral, external participants, or internal participants) with the session.

Defining the Team

Access the Event - Team page (click the Team tab).



Event - Team page

Team Members section

This section shows the team members associated with the event. The Owner check box is selected for the event owner. You can add more team members by clicking the Add Team Member button.

If you add a team member on this page, that person will be immediately available for selection on the Sessions page. Likewise, if you delete a team member who was already associated with a session, that team member is automatically deleted from any sessions with which he or she was associated.

You can secure an event so that only team members and team roles that you have specified on this page can view or access the event.

Team Roles section

This section shows the roles associated with the event. You can select a role from the available list, and add another role by clicking the Add Team Role button.

Defining Resources

Access the Event - Resources page (click the Resources tab).

Event Resources page

This section displays any resources currently attached to the event. You can use the page to associate resources to a particular session.

Resource Summary

The Resource Summary section displays an overview of all the event's resources. Click a resource name to display more detail about the resource. The summary includes the following:

- *Type*: The type of resource. The available values are *Collateral,External Participant,Internal Participant,* and *Other.*
- *Name*: The name of the resource. Click the name to display more detail about it.
- *Session*: If the resource is related to a session, then the session name appears here; otherwise, the field is empty.
- *Description*: A description of the resource.

Add a Resource

Click this button to insert another resource item in the list and display its Resource Detail information.

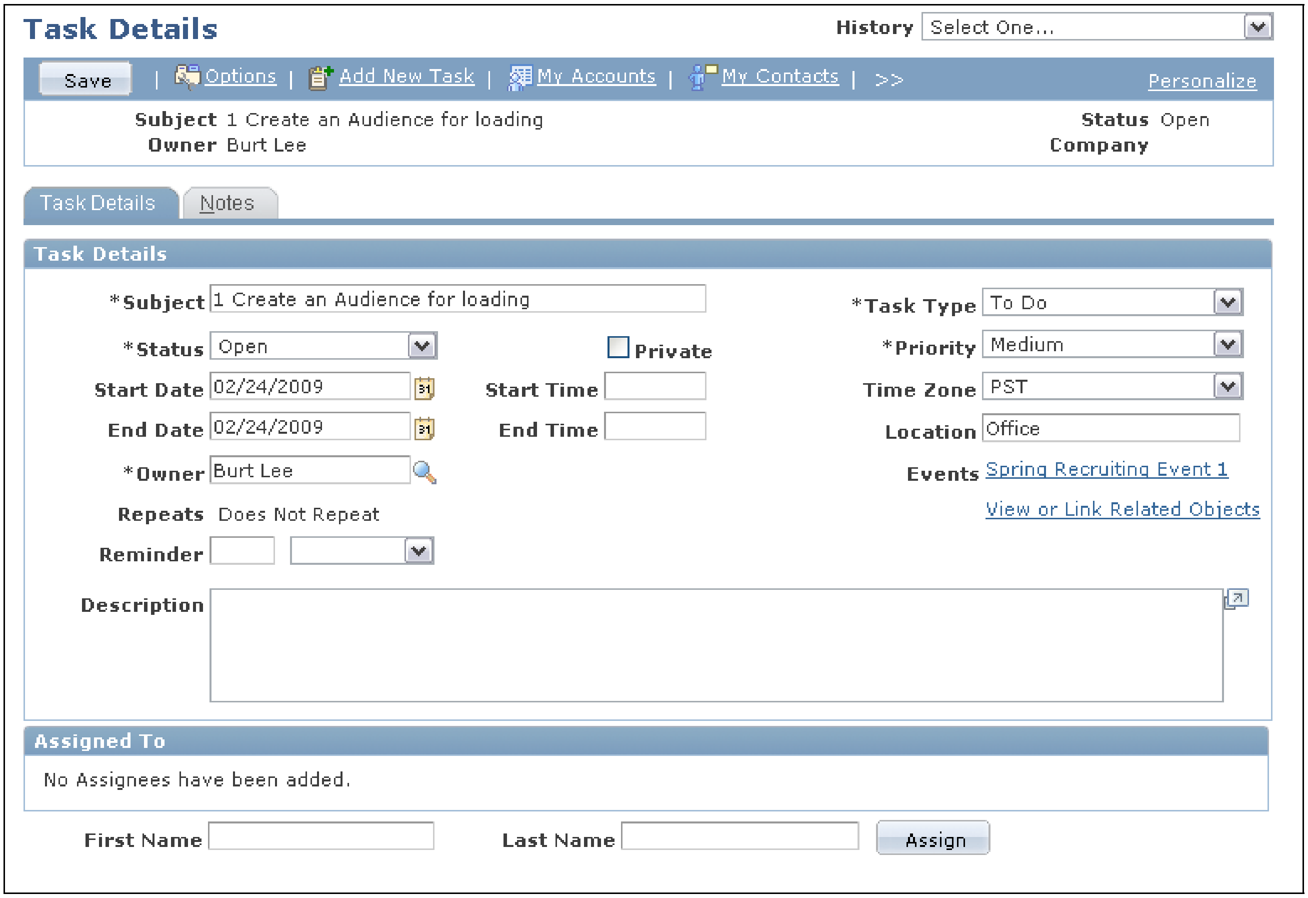
Resource Detail

The Resource Detail section displays more information about a new or selected resource. Click the Apply Resource button to update the grid with any changes and hide the Resource Detail section.

- *Type*: The type of resource: *Collateral,External Participant,Internal Participant,* or *Other.*
- *Name*: The name of the resource. If the Type is *Collateral,* a lookup for Marketing Collateral appears. If Type is *Internal Participant,* a lookup for Workers appears. If the Type is *External Participant* or *Other,* then no lookup appears.
- *Session*: You can select a session to which to relate this resource. A resource can only be related to one session.
- *Description*: A description of the resource.
- *Apply Resource*: Click this button to close the Resource Detail section and apply the changes to the Resource Summary grid. If you arrived at this page from the Session page, then you will be returned there after the changes are applied.

Defining Tasks

Access the Task Details page (click the Tasks tab, then click the name of the task you want to view).



Event Task page

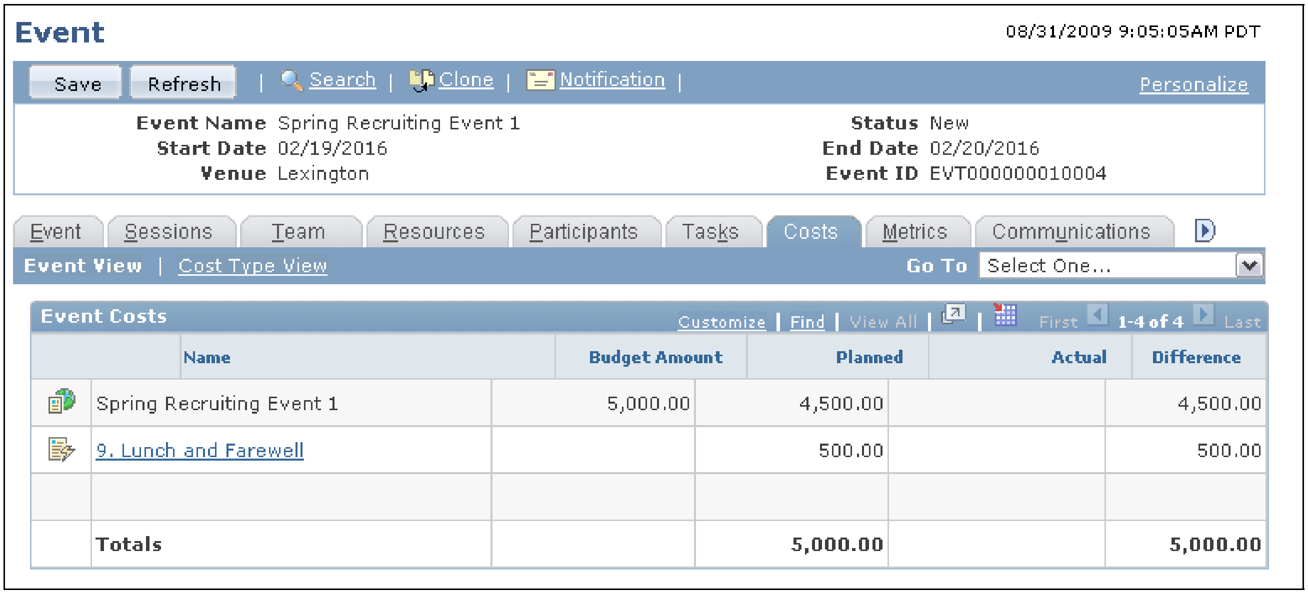
You can use Task Groups to set up common recurring tasks for events, then reuse the tasks for a different event. Examples of common recurring tasks could include reserving the venue, reserving speakers, printing name cards, and so forth.

Refer to the Tasks section in the Marketing documentation for more information about using tasks.

See *PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook*, "Setting Up PeopleSoft Enterprise Marketing and TeleSales," Defining Task Tools and *PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook*, "Creating Campaigns and Activities," Defining Campaign Tasks.

Defining Costs

Access the Event - Costs page (click the Costs tab).



Event Costs page

The Cost tab displays costs associated to the specified event and its sessions.

Event View tab

This tab displays information about the event costs:

- *Name*: The event or session name. Event names are not linked; session names are linked to their associated event and clicking them will display that event's information.
- *Budget Amount*: The budget amount from the event. This value is not used in calculations.
- *Planned*: The planned amount (totals) as entered as event or session costs, totaled by event or session.
- *Actual*: The actual amount (totals) as entered as event or session costs, totaled by event or session.
- *Difference*: The Planned value minus the Actual value.

Cost by Cost Types tab

This tab displays information about event cost types:

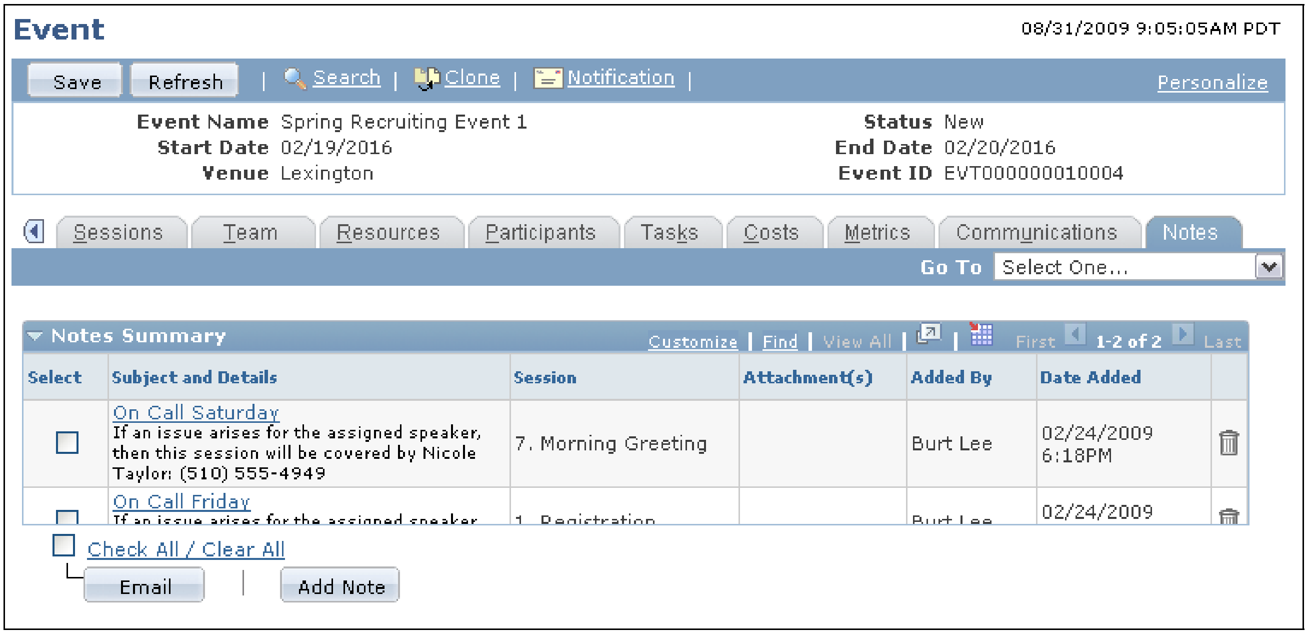
- *Description*: A description of the cost, entered during Cost Setup.
- *Cost Type*: The type of cost, entered during Cost Setup.
- *Planned*: The planned amount (totals) as entered as event or session costs, summarized by cost type.
- *Actual*: The actual amount (totals) as entered as event or session costs, summarized by cost type.
- *Difference*: The Planned value minus the Actual value.

For more information about costs, refer to the Costs section in the Marketing documentation.

See *PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook*, "Setting Up PeopleSoft Enterprise Marketing and TeleSales," Defining Cost Elements.

Defining Notes

Access the Notes page (click the Notes tab).



Event Notes page

Clicking the Notes tab will display notes associated to this event or to an event session.

Selection Check Box

Select the check box to select a note for emailing.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications," Sending Manual Notifications From CRM Transactions.

Subject and Details

Click the Subject link to view the note detail.

Session Name

The event session to which the note is related. If the note is for an event, this field is empty.

Attachments

If there are any attachments associated with the note, a paperclip icon appears in this field.

Row Added By, Row Added Date

The name of the person who added the note and the date on which it was added.

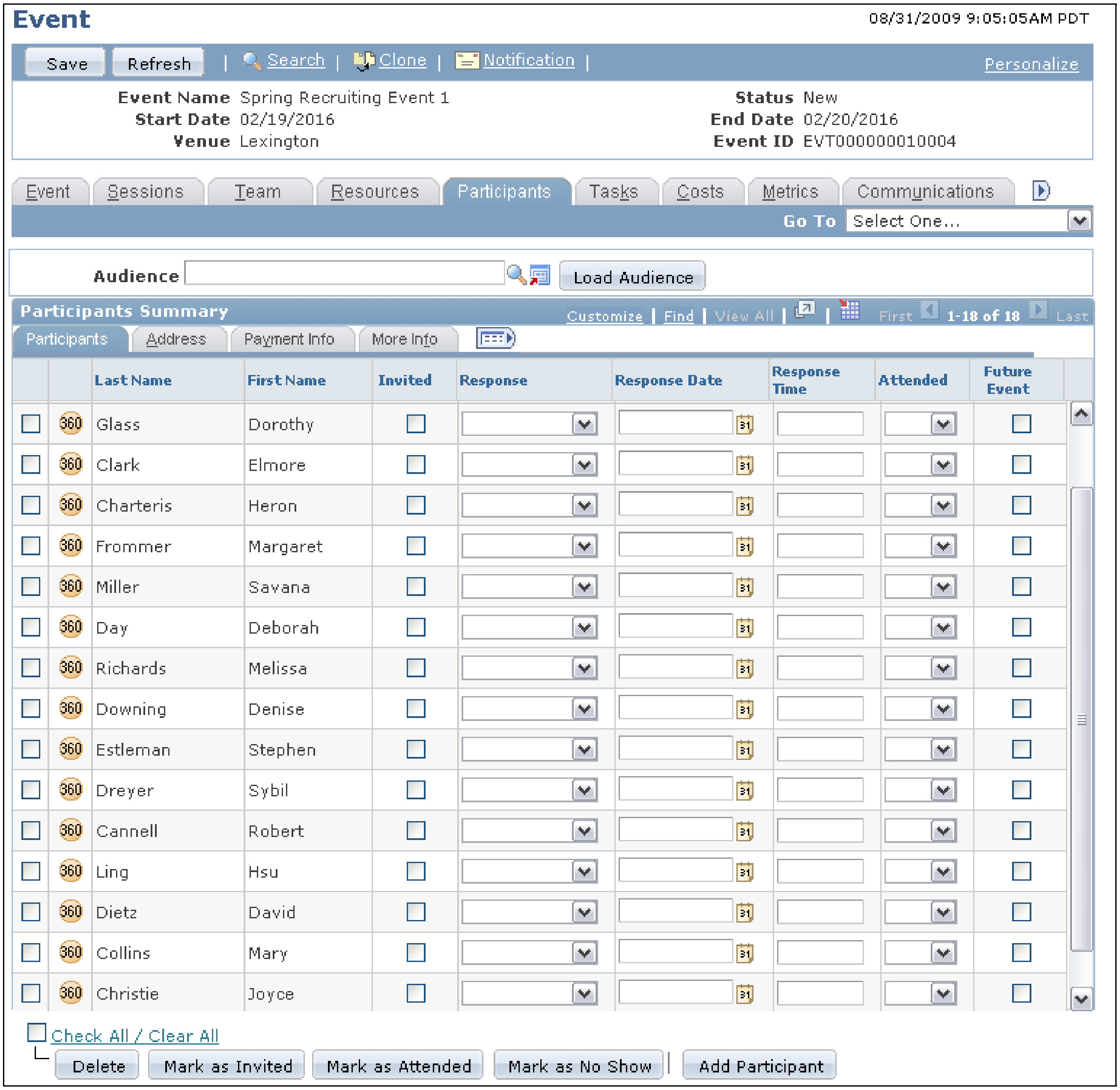
Note Type

Select *Event* or *Session* from the list of choices.

Session	If you selected *Session* in the Note Type field, you can select an available session from the list of choices.
Subject	The subject of the note.

Defining Participants

Access the Participants page (click the Participants tab).



Event Participant page

Note. This section describes only the Participant page fields relevant to defining participants for the event. For information about inviting participants, refer to the Sending Invitations section.

You can select audiences to load in order to populate the participant list for your event. You can also add participants manually. There are no restrictions to the number of participants that can be loaded.

Audience	Select the name of the audience you want to load.

Load Audience Click this button to load one or more seed audiences to create the initial participant list. You can add participants manually or by loading additional audiences, which are added cumulatively to the list. If the audience is dynamic, clicking this button will generate it.

Note. If you load multiple audiences, the Audience field will display the name of the last audience loaded. Members of all the loaded audiences are displayed in the participant list, but after they have been loaded the list does not display the name of the audience from which they were loaded. In the case of multiple audiences containing the same person, deduplication is performed so that the person's name appears only once in the participant list.

Participants Tab

The Participants tab shows detailed information about the invitees.

360 icon Click this icon to access the 360-degree view for the invitee. The type of 360-degree view displayed depends on which application is installed and enabled.

Last Name, First Name The name of the invitee.

Add Participant Click this button to add additional individuals to the participant list.

If the person already exists in the participant list with a different role, an error message displays informing you that you cannot add the same person with a different role. If you want to change the participant's role, you can delete the existing participant and add a new one.

If the search returns no results, you can quick create the person with the role of Consumer, Contact for a Company, or Contact for a Partner. If the prospective participant has requested not to be contacted, an error message displays and that person is not added to the participant list.

Address Tab

This tab contains invitees' email and physical addresses.

More Info Tab

Role The invitee's role (for example, Consumer, Contact, or Worker). If the same person appears in the attendee list under multiple roles (for example, if the person belongs to more than one audience), then priority is given to the Consumer role followed by Contact for Company, Contact for Partner, and finally Worker.

Do Not Contact requests are not considered when loading audiences, since it is expected that any applications using the lists will be applying Do Not Contact rules.

Company The company with which the invitee is associated. This field is optional.

Comments	Enter any relevant comments from or about the attendee (for example, meal preference or any special accommodations that must be made).
360 icon	Click this icon to access the 360-degree view for the invitee. The type of 360-degree view displayed depends on which application is installed and enabled.

Chapter 3

Inviting and Registering for Events

This chapter describes the process of inviting and registering for events. It includes the following sections:

- Sending Invitations.
- Registering Online for Events.
- Sending Event Reminders.

Sending Invitations

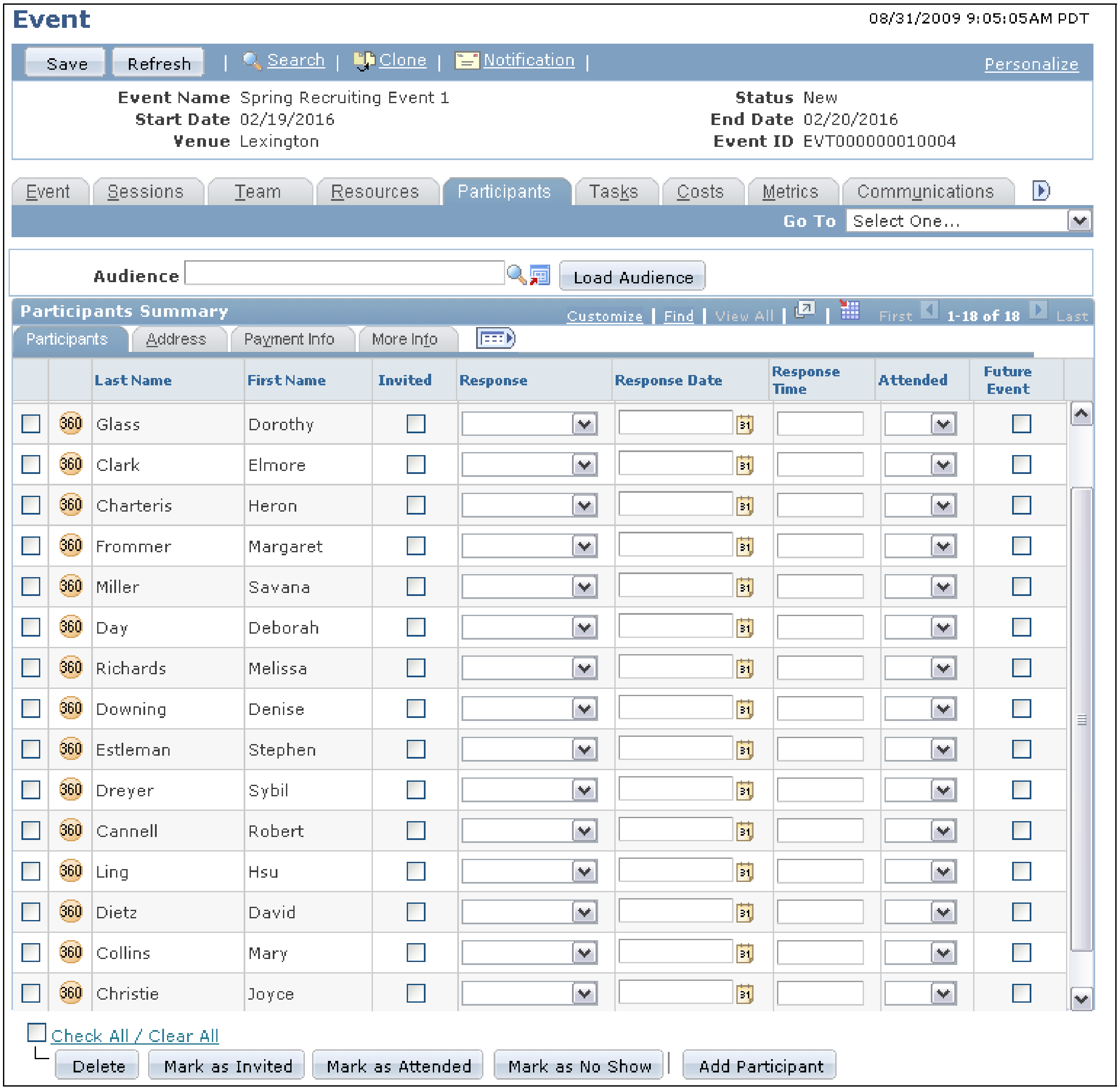
This section describes how to send invitations to an event.

Pages Used to Send Invitations

Page Name	***Definition Name***	***Navigation***	***Usage***
Event - Participants	RAE_EVENT_REGISTR	Click the Participants tab on the Event Detail page.	Send invitations to an event.

Sending Invitations to the Event

Access the Participants page (click the Participants tab on the Event Detail page).



Event Participant page

Note. This section describes only the Participant page fields relevant to inviting participants to the event. For information about defining participants, refer to the Defining Participants section.

Depending on the number of seats available for the event, invitees can either be Registered or Waitlisted. Additionally, they can decline the invitation but specify that they are interested in future events similar to this one. Finally, the participant can be marked as either Attended or a No Show, depending on whether they actually attended the event.

Participants Tab

The Participants tab shows detailed information about the invitees.

360 icon	Click this icon to access the 360-degree view for the invitee. The type of 360-degree view displayed depends on which application is installed and enabled.
Last Name, First Name	The name of the invitee.
Invited	Select this check box to include the specified person in the event invitation.
Response	Select the invitee's response to the invitation from the list of choices. The default value is no response; other options include *Registered,Waitlisted*, and *Declined.* Invitees are waitlisted if they accept the invitation after all available seats for the event have been filled.
Response Date, Response Time	The date and time on which the invitee responded to the invitation.
Attended	Specifies whether the invitee attended the event. By default this field is blank; select *Yes* or *No.*
Future Event	Select this check box if the invitee has indicated interest in receiving information about upcoming future events similar to this one.
Mark as Invited	Click this button to mark all selected invitees as Invited to the event.
Mark as Attended	Select this check box to mark all selected invitees has having Attended the event.
Mark as No Show	Click this button to set the value in the selected invitees' Attended field to No.
Add Participant	Click this button to add additional individuals to the participant list. If the person already exists in the participant list with a different role, an error message displays informing you that you cannot add the same person with a different role. If you want to change the participant's role, you can delete the existing participant and add a new one. If the search returns no results, you can quick create the person with the role of Consumer, Contact for a Company, or Contact for a Partner. If the prospective participant has requested not to be contacted, an error message displays and that person is not added to the participant list.

Payment Info Tab

This tab shows the details about the invitee's payment.

Amount Paid	The amount that the invitee has paid to attend the event. This amount is captured automatically from the Online Marketing credit card payment.
Refund Amount	The amount refunded to the invitee (for example, if attendance was cancelled). The Amount Paid and Refund Amount are used when calculating the revenue generated from the event.

Currency Code	The currency type in which the payment was made. The Currency Code displayed is the same as the value specified on the Event Detail page.
360 icon	Click this icon to access the 360-degree view for the invitee. The type of 360-degree view displayed depends on which application is installed and enabled.

Registering Online for Events

This section describes:

- Setting Up Online Marketing to Access Marketing Events.
- Setting Up an Online Marketing Document to Accept Credit Card Payments.
- Sending Event Reminders

Note. A PeopleSoft Online Marketing license is required for online registration.

Setting Up Online Marketing to Access Marketing Events

This section provides an overview of the Access Marketing Event custom content extension and its use in Online Marketing Dialogs.

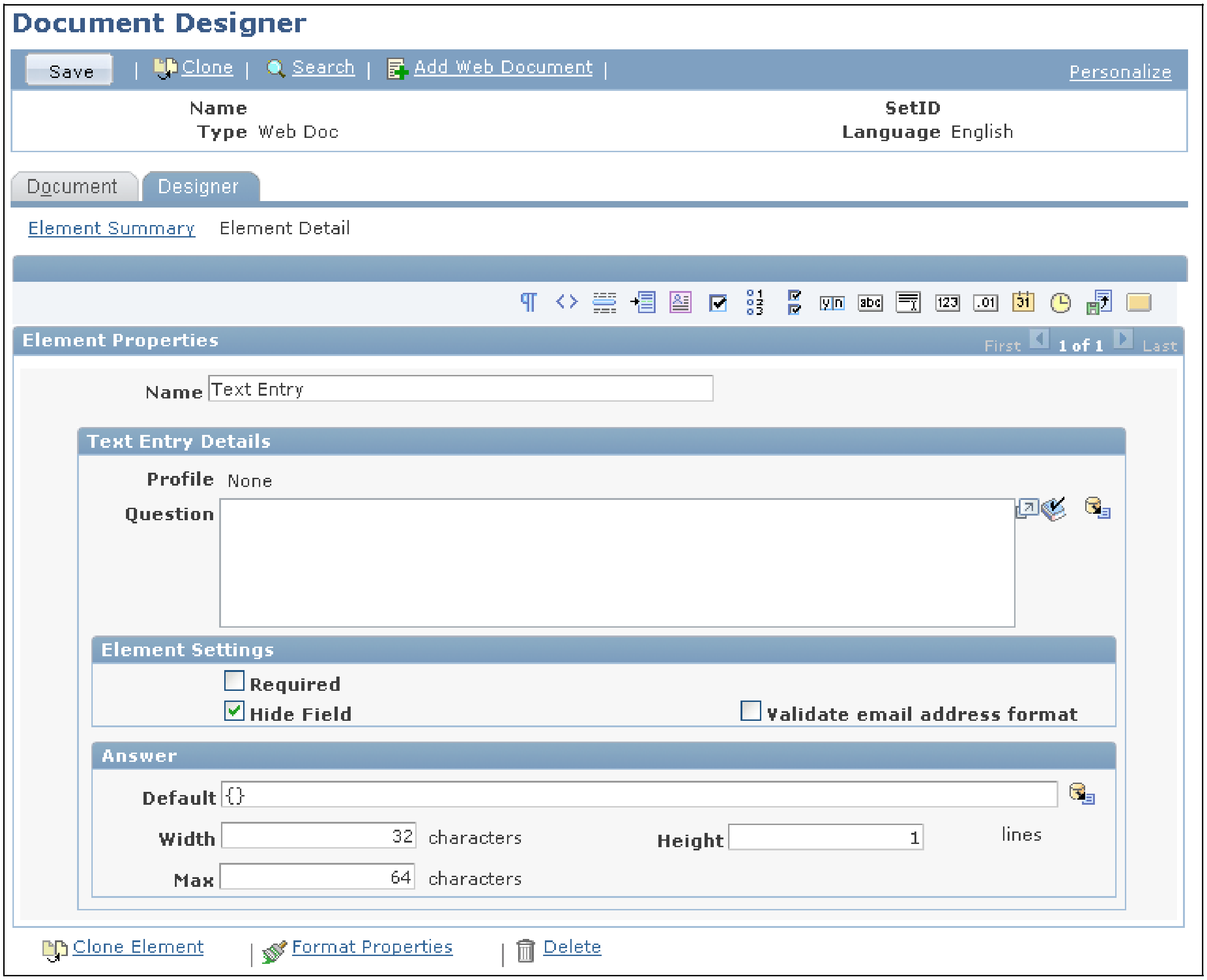
To allow you to access event information from an Online Marketing dialog, Online Marketing includes a custom content extension named Access Marketing Event. The extension itself is described in the Online Marketing documentation, as is the general process for including extensions in documents; this section explains how you can use it in your Online Marketing dialogs.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Using Extensions," Access Marketing Event.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Using Extensions."

Creating the Document Field

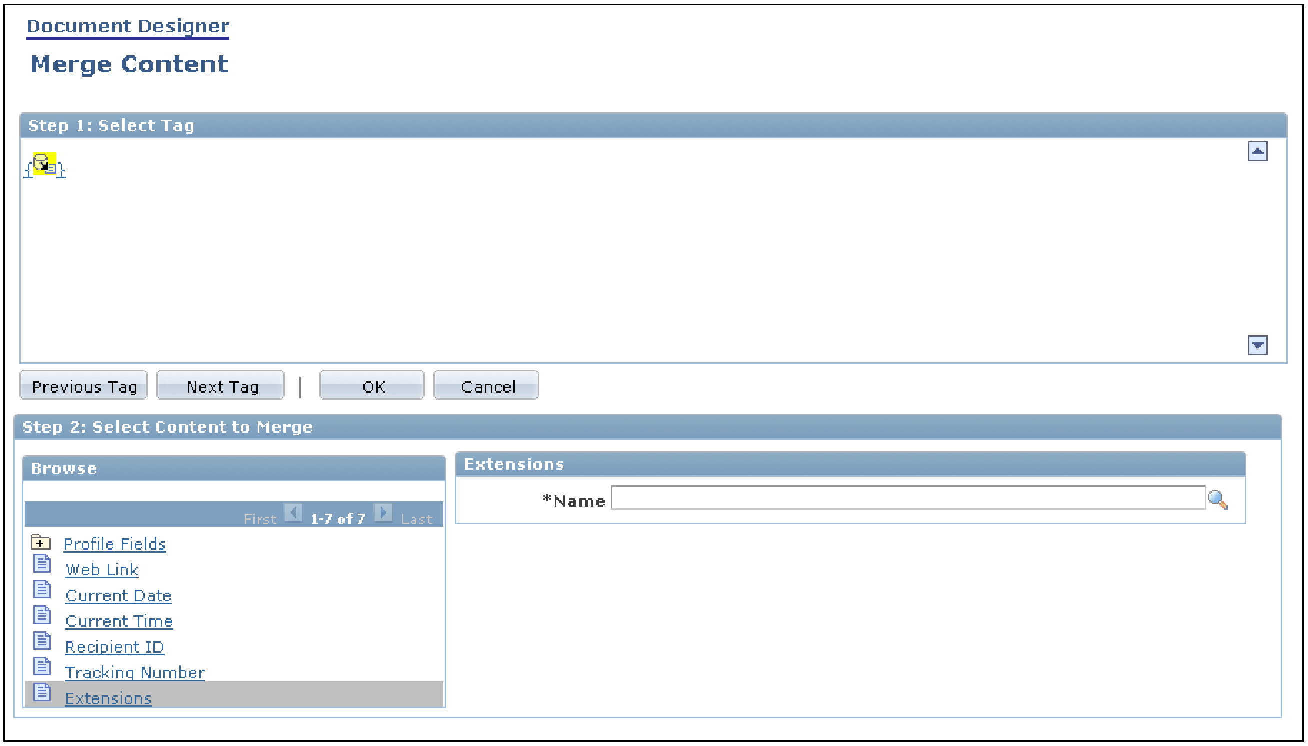
To insert the Access Marketing Event extension into a document, first add a Text Entry field.



Document Designer page with Text Entry field

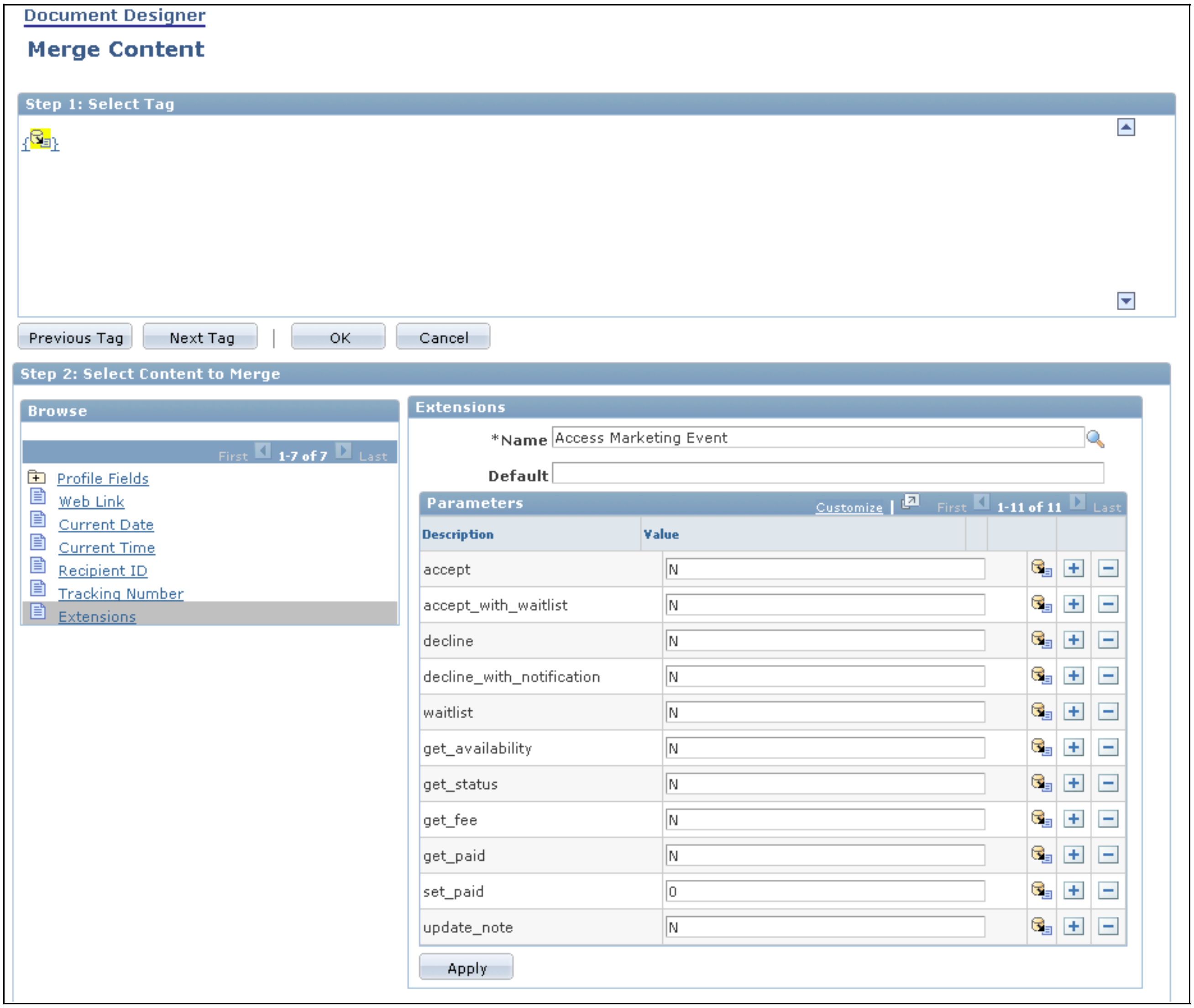
If you want to format the results in a more attractive way, select the Hide Field check box, and put an empty tag ({}) in the Default field.

Next, click the Merge icon next to the Default field to display the Merge Content page, and select Extensions from the list.



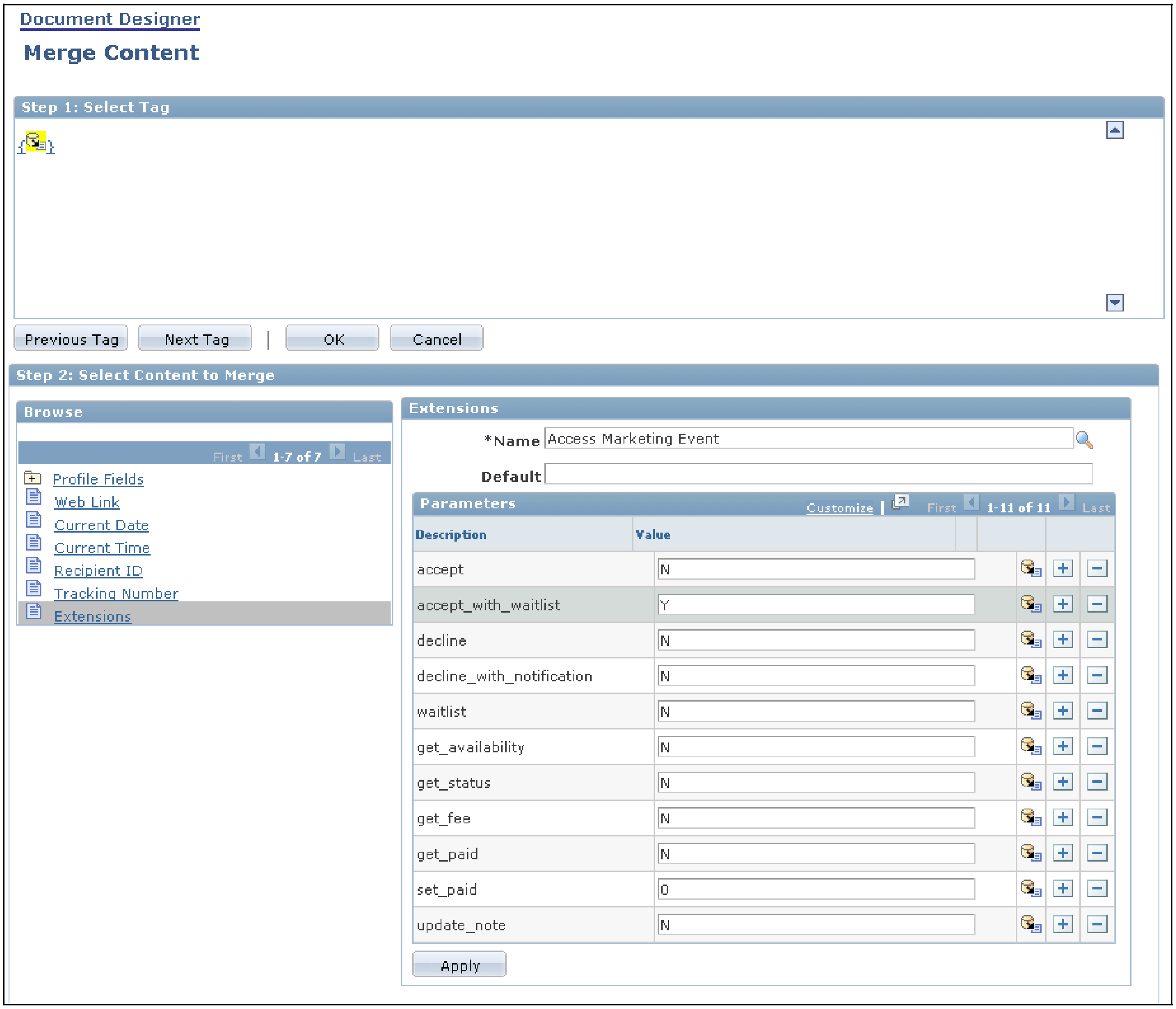
Merge Content page

Type *Access Marketing Event* in the Name field, or click the lookup icon to select it from a list of available extensions. The list of parameters for the Access Marketing Event extension are displayed.



Merge Content page with parameters displayed

Next, type Y or Yes in one of the Value fields for the extension, depending on the functionality you want to include in your field. Note that you should only do this for one of the fields; leave the others as is. The system will implement the first parameter for which it finds a Y or Yes value.



Merge Content page with parameter chosen

Click the OK or Apply button to save your settings.

When the document is rendered, the Access Marketing Event extension performs its functionality, filling the Text Entry box with its return value (in the case of the example, this value will be either *Registered*,*Full*, or *Waitlisted*, depending on whether available spaces still exist for the event.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Using Extensions," Access Marketing Event.

Using Access Marketing Event with Dynamic Content

After you have defined the parameters for the Access Marketing Event extension, you can insert it into dynamic content in the document.

To do this, insert a dynamic content into your text field, and then insert a document field containing the return value of the Access Marketing Event extension into the Content section of the Dynamic Content page. Refer to your Online Marketing documentation for more information about inserting dynamic content into documents.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Designing Email Documents," Adding Dynamic Content to an Email Document.

Using Access Marketing Event with the Dialog Flow

After you have defined the parameters for the Access Marketing Event extension, you can insert it into a decision point in a dialog flow.

To do this, define documents for each of the conditions (for example, one to be sent if the invitee is able to successfully register for the event, another to be sent if he or she is added to a waitlist, and a third if the event is full). When you create the flow for the dialog, you can add a Decision Point element and configure it to send the specified document for the specified parameter value.

Setting Up an Online Marketing Document to Accept Credit Card Payments

This section provides an overview of the Credit Card Service custom content extension and its use in Online Marketing Dialogs.

To allow you to accept credit card payments from an Online Marketing dialog, Online Marketing includes a custom content extension named Credit Card Service. The extension itself is described in the Online Marketing documentation, as is the general process for including extensions in documents and for creating online dialogs; this section explains how you can use it in your Online Marketing dialogs.

Note. The Credit Card Service extension supports only the use of credit cards. Debit cards and pay services such as Paypal are not supported. Cards that are both debit and credit cards are assumed to be credit cards for the purposes of the extension.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Using Extensions," Credit Card Service.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Using Extensions," Creating and Using Extensions.

Overview of Creating an Online Marketing Dialog to Accept Credit Cards

In order for your Online Marketing dialog to accept credit cards, you must do the following:

1. Create document fields or profile fields containing the values you want to include on your credit card page (first and last name, billing address, credit card number, expiration date, and so forth). These fields should correspond to the parameters on the Credit Card Service extension.

2. Create a document that includes fields requesting all of the information you want to gather (these fields should correspond to the profile or document fields you already created). Include a Submit button on the document.

3. Create a second document. It should contain the following:

    - Some sort of text, graphic, or other indication that the system is processing the credit card (for example, Please wait while we process your credit card.)

    - A hidden document field that includes merge content to call the Credit Card Service extension (refer to the section on creating the document field). For each parameter in the extension, include the appropriate profile or document field that you have previously created.

    - A hidden document field to accept the results of the Credit Card Service extension. The extension returns an authorization code if the credit card is accepted, *0* if it is declined, or *1* if a system error occurs.

    - A Submit button with the Invisible Auto-submit Button option selected. A button with this option selected does not appear on the page, but is automatically clicked when the page is displayed.

The typical document flow might include the following:

- An External Event Trigger.

- A Landing Page (the page where the user enters the credit card data and submits it).

- An Intermediate Page (the credit card submit page that contains the text, the hidden fields, and the hidden auto-submit button)

- A Decision Point: If the value returned is greater than 0 (indicating success), go to a Final Page informing the user that the transaction was successful. Otherwise, you can choose to either send the user back to the data collection page, or display another Final Page indicating that the transaction failed.

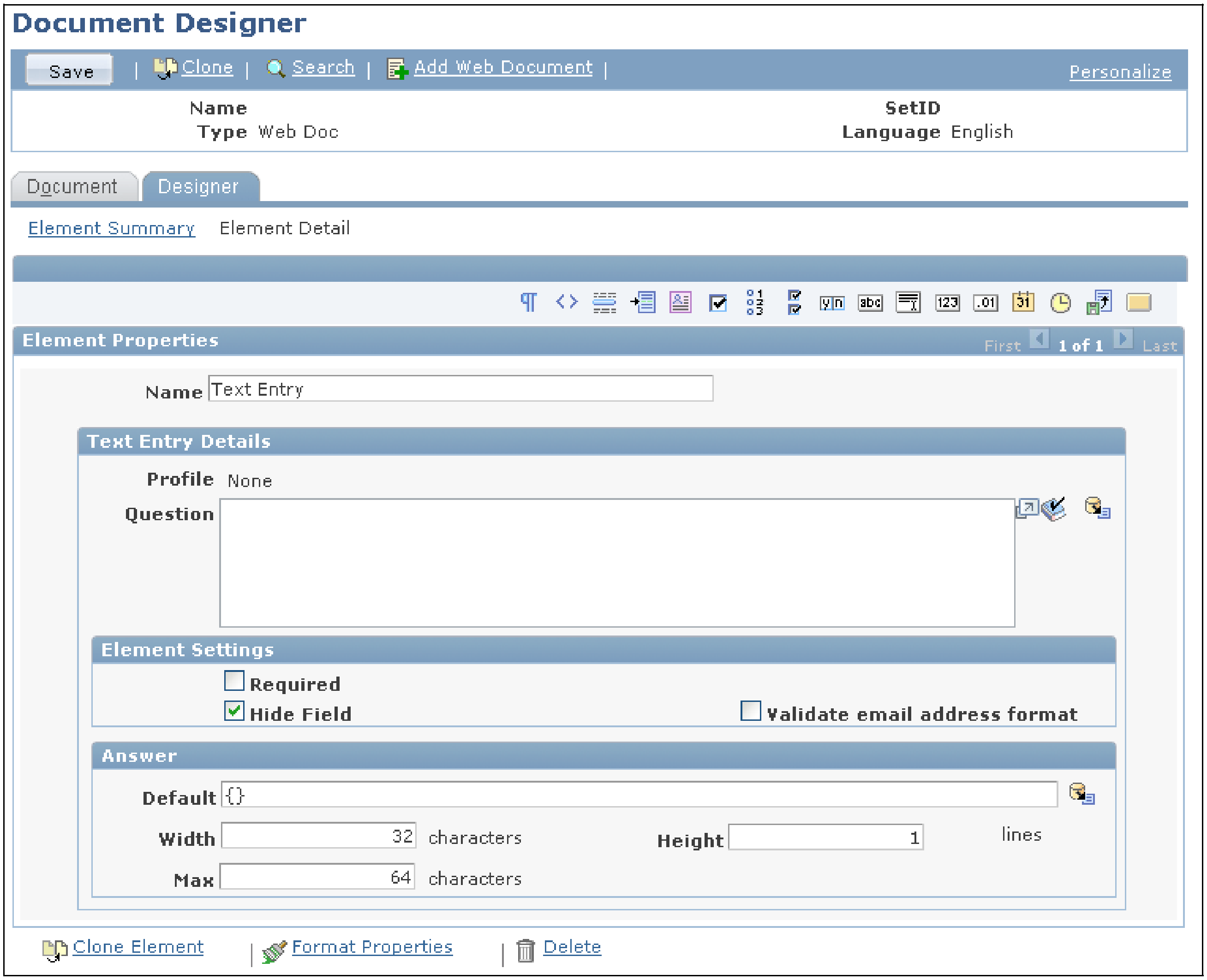
See Chapter 3, "Inviting and Registering for Events," Creating the Document Field, page 34.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Using Extensions," Credit Card Service.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "PeopleSoft Enterprise Online Marketing Preface."

Creating the Document Field

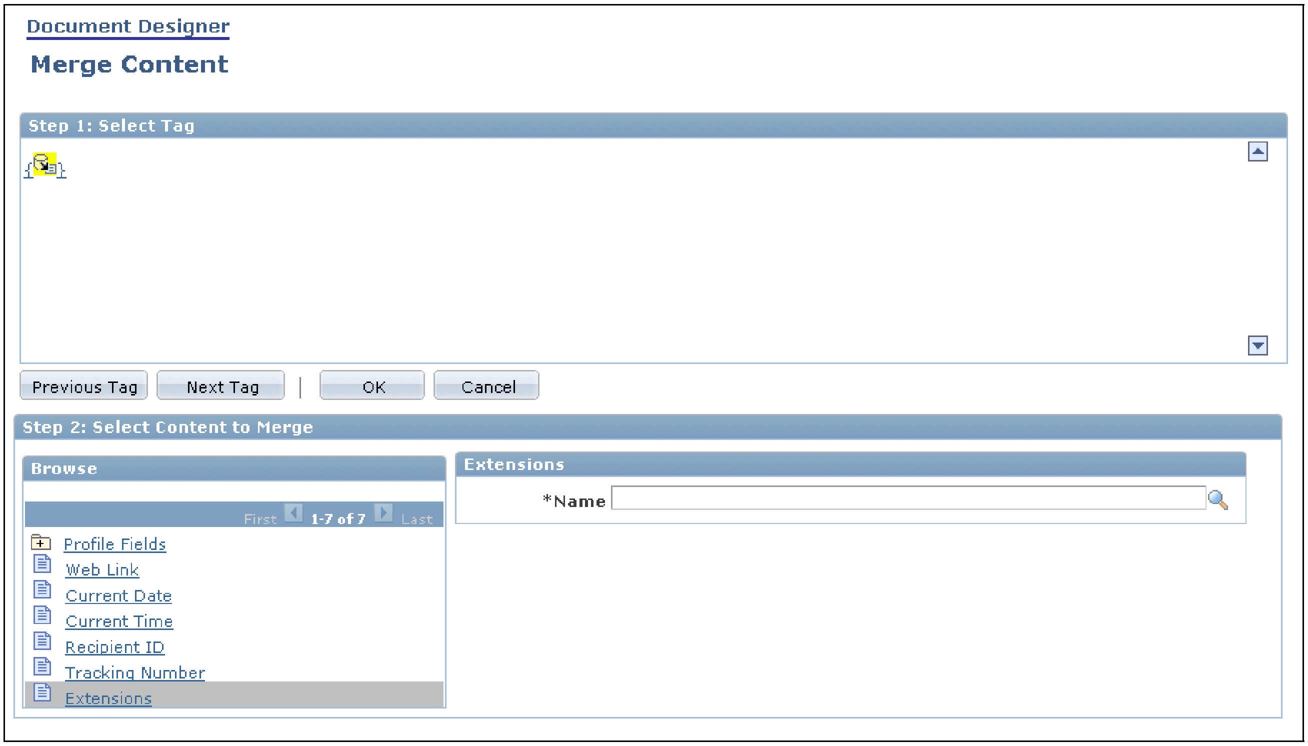
To insert the Credit Card Service extension into a document, first add a Text Entry field.



Document Designer page with Text Entry field

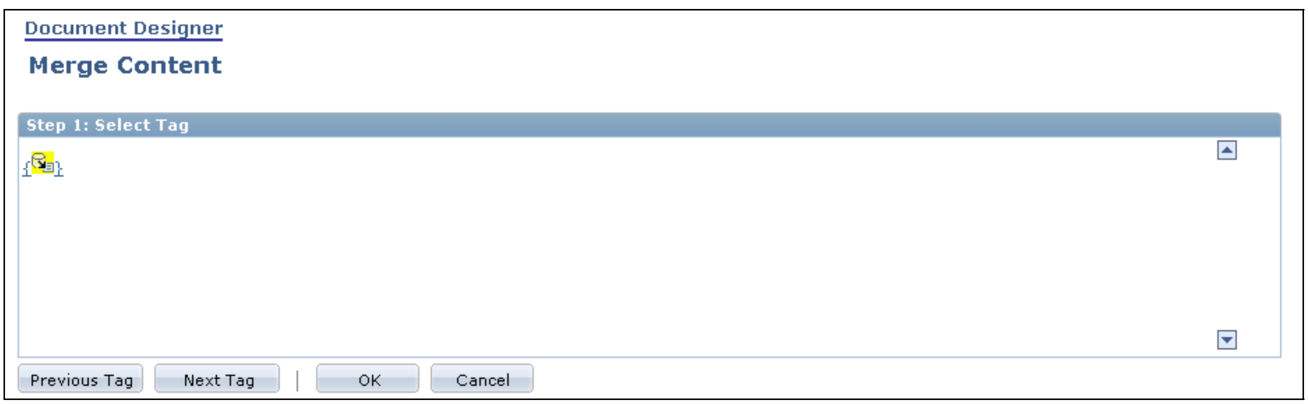
If you want to format the results in a more attractive way, select the Hide Field check box, and put an empty tag ({}) in the Default field.

Next, click the Merge icon next to the Default field to display the Merge Content page, and select Extensions from the list.

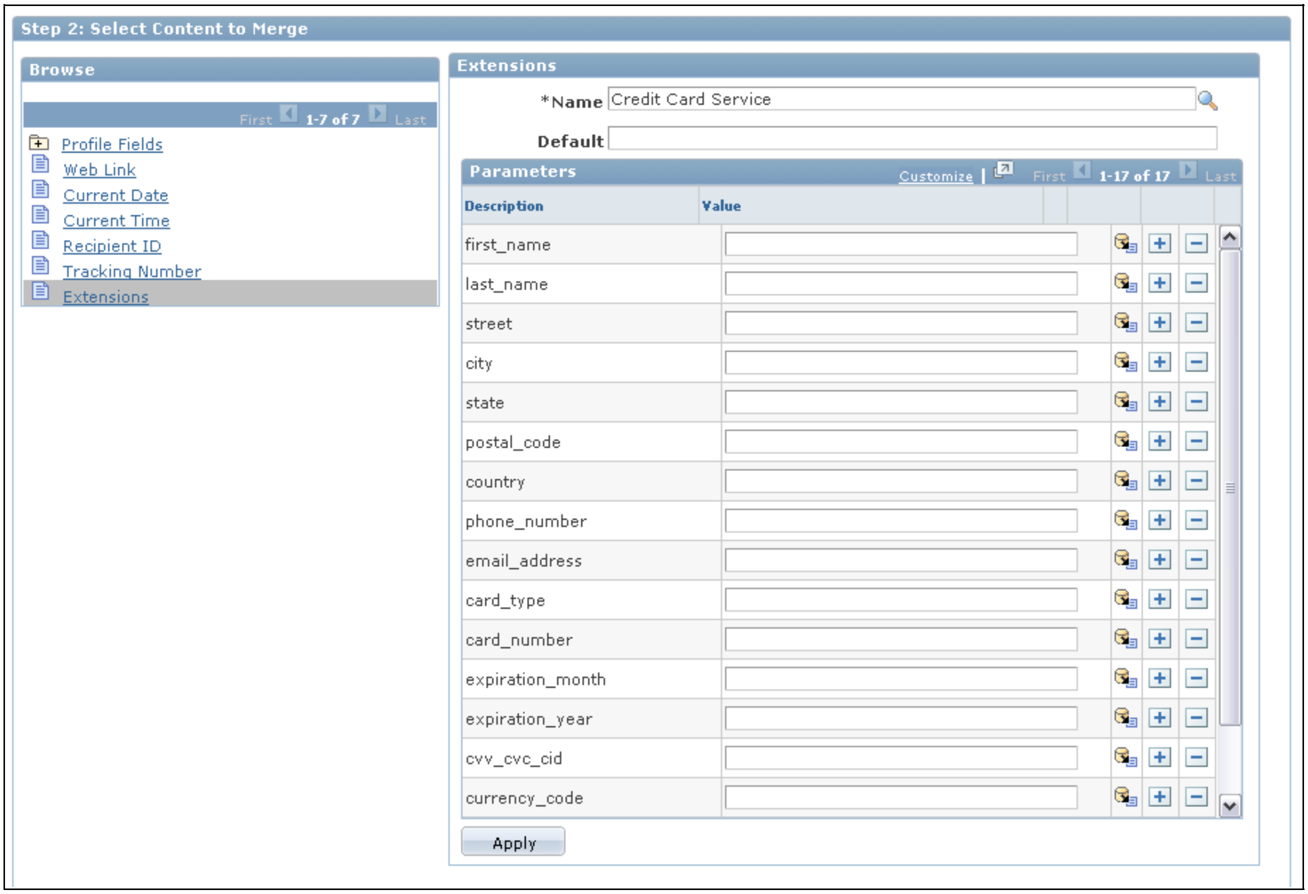


Merge Content page

Type *Credit Card Service* in the Name field, or click the lookup icon to select it from a list of available extensions. The list of parameters for the Credit Card Service extension are displayed.



Merge Content page with parameters displayed (1 of 2)



Merge Content page with parameters displayed (2 of 2)

Click the OK or Apply button to save your settings.

When the document is rendered, the Credit Card Service extension performs its functionality, filling the Text Entry box with its return value (in this case, the value will either be an authorization code, 0 for failure, or 1 for a system error).

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Using Extensions," Credit Card Service Extension Execution.

Sending Event Reminders

Using Online Marketing, you can send event promotions, reminders, and notices to event invitees and participants. Using the audience builder capabilities, event registration reminders can be sent specifically to those who have been invited to the event but have not yet registered in order to maximize event registration, or invitees who have not registered can be reminded that a deadline for early bird registration is approaching. To maximize event attendance, reminders can be sent specifically to those that have registered to inform them of event updates like a venue change, or to send a reminder of the upcoming event using any of the communication methods enabled in online marketing, including email and SMS notification

The process for sending reminders is discussed in the chapter on executing and converting events, and in the Online Marketing documentation in the chapters on designing online dialogs and on designing email messages.

See Also

PeopleSoft Enterprise Online Marketing 9.1 PeopleBook, "Designing Email Documents"

PeopleSoft Enterprise Online Marketing 9.1 PeopleBook, "Designing the Flow for an Online Dialog"

Chapter 4

Executing and Converting Events

This chapter describes the process for executing and converting events, and includes the following sections:

- Setting Up Email Communications.
- Setting Up Print Communications.
- Creating Leads from Events.

Setting Up Email Communications

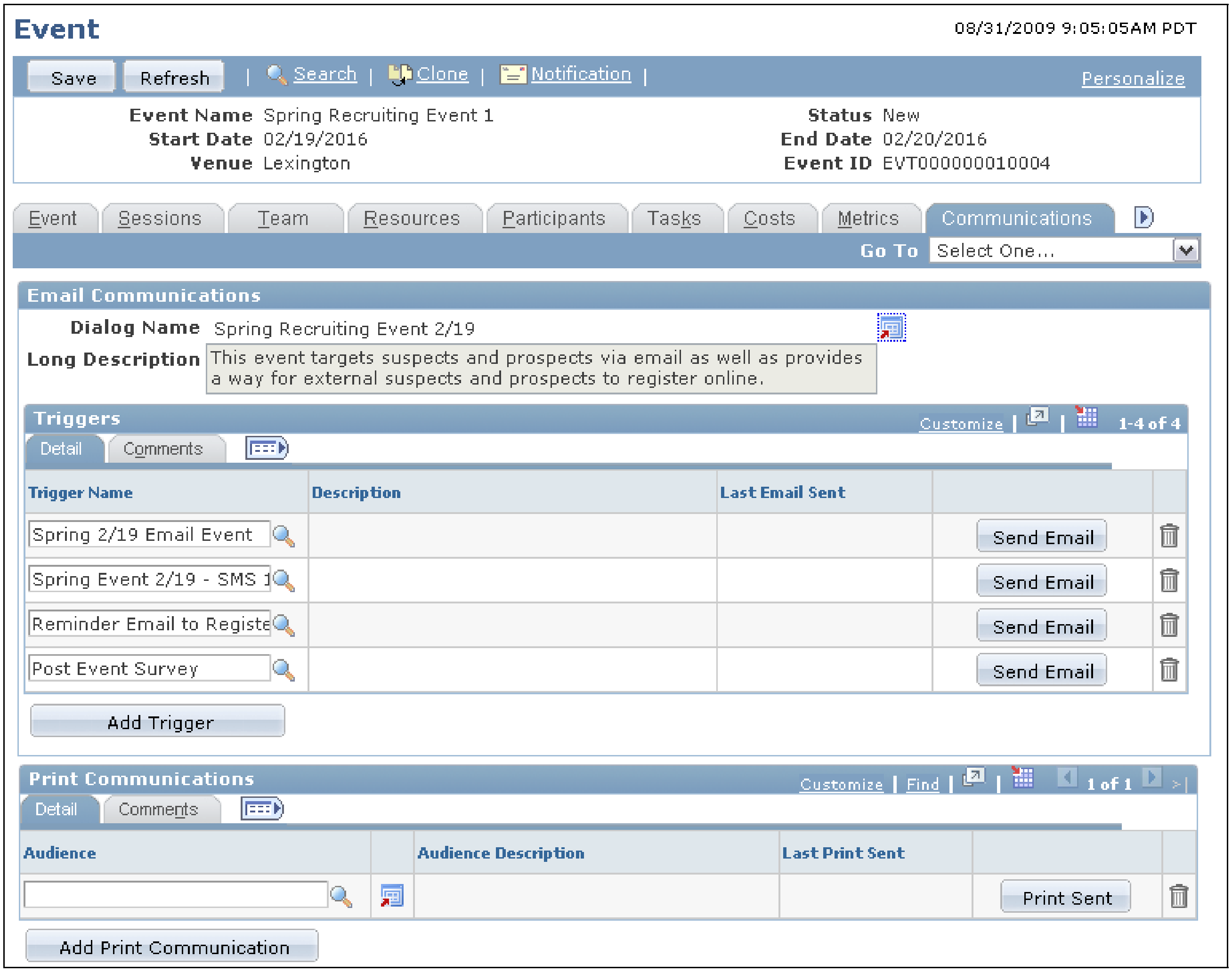
This section describes how to set up email communications for an event.

Pages Used to Set Up Email Communications

Page Name	*Definition Name*	*Navigation*	*Usage*
Event - Communications	RAE_EVENT_ACTIONS	Click the Communications tab on the Event page.	Set up email communications for an event.

Setting Up Email Communications

Access the Communications page (Click the Communications tab on the Event page).



Event Communications page

The Communication tab displays both email and print communications associated with the event.

Email communications are a direct interface to Online Marketing Dialog Designer. You must select a dialog and a trigger. The trigger should be associated with a broadcast email action with an associated audience, depending on the type of email communication required.

Dialog Name

Select an Online Marketing dialog from the list of choices. The list displays all dialogs that:

- Are not in the *Archived* or *Completed* status.
- Have the Trigger On Demand check box selected.

Description

A description of the selected Online Marketing dialog.

Trigger Name

The name of the trigger on the selected dialog.

Trigger Description

Description of the selected trigger.

Last Email Sent	The last time the Send Email button was clicked to launch the action.
Send Email	Click this button to launch the selected processes on the selected dialog.
Add Trigger	Click this button to add another trigger to the list.

The typical email communications flow is as follows:

1. Create a participant list using the Participant tab (by loading audiences, manually adding participants, and so forth).

2. Create an audience that consists of all the participants for whom the Invited check box has not been selected.

3. Associate the audience to a bulk email action and associate a trigger to one or more bulk mail actions.

4. When you click the Send button, the email is sent to all of the participants based on the audience that has been defined.

5. After the email process is complete, the Invited check boxes are updated with all of the participants who received an invitation through the email process.

6. The Last Email sent timestamp is updated and the event is set to *Executing.*

You can set up multiple triggers for different email communications; for example:

- Send reminders to non-responders.
- Send more information to registered participants.
- Send reminders prior to event for registered participants.
- Send surveys to those who attended.

You should use the trigger description to give some indication of the type of communication to be sent. You can use the Comments field on the Comments tab to specify any further details about the specific communication.

Note that if email was sent against the trigger , then you will no longer be able to click the Dialog Name prompt or the Trigger prompt; further, the trash can (delete) icon is display only so you will not be able to delete the trigger. If no triggers have been sent and you try to change the dialog name, a message is displayed stating that all triggers will be deleted and asking you to confirm that you want to continue.

The dialog must be live in order to send email.

See *PeopleSoft Enterprise Online Marketing 9.1 PeopleBook*, "Designing the Flow for an Online Dialog."

Setting Up Print Communications

Access the Communications page.

The Communication tab displays both email and print communications associated with the event.

Print communications are used when sending print invitations, brochures, postcard reminders, and so forth, using PeopleSoft Correspondence Management. Online Marketing is not required for sending print communications.

You can transfer from the audience to Correspondence Management and initiate one or more Correspondence Management jobs. Alternatively, if you choose not to use Correspondence Management and are simply mailing brochures, postcards, or other print media using a third party, then you can enter the audience and click the Timestamp to provide an audit history of the print communications.

Audience Select an audience from the available list. Note that audiences that are not in the Committed state might appear as empty. If this occurs, the system takes the information from the audience record itself rather than the list of Committed audiences.

Print Sent Click to view a history of which print communications were sent, when they were sent, and the audience they were sent to. When you click this button, a message is displayed informing you that the system is setting the Last Print Set field, and that audience correspondence must be initiated in the Audience component. You can click the icon next to the Audience field to transfer to the Audience component.

Creating Leads from Events

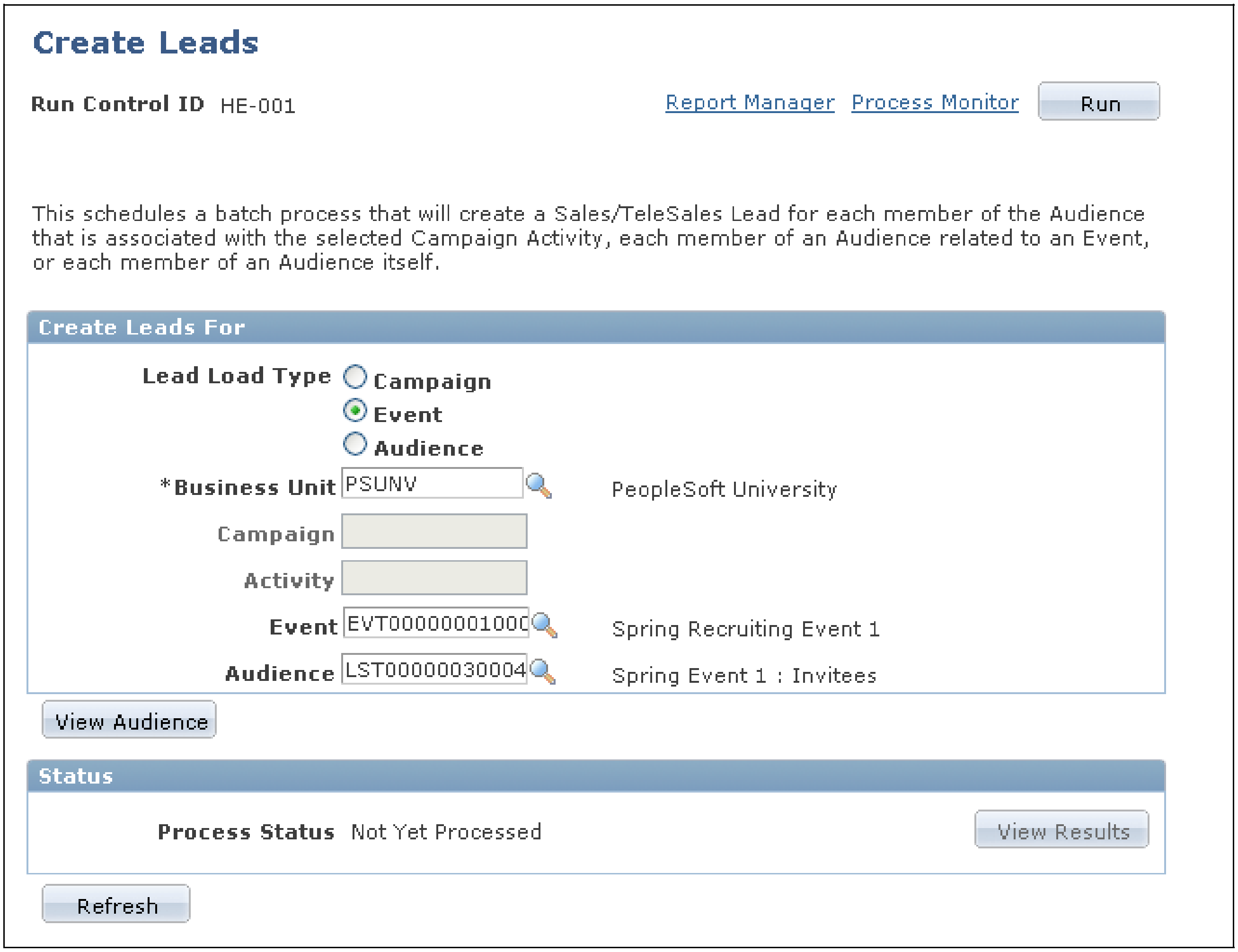
Following an event's completion, you can create sales leads from audience members and events. You can create leads from audience members without reference to an event, or for all audience members associated with a particular event.

Pages Used to Create Leads from Events

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Leads	RA_CREATE_LEADS	Marketing, Execution, Manual Leads Creation	Create sales leads from audiences, marketing campaigns, and events.
Lead Qualify	RSF_LEAD_QUALIFY	Sales, Search Leads Click the Qualify tab.	Associate sales leads and opportunities with events.

Creating Leads from an Audience or Event

Access the Create Leads page (Marketing, Execution, Manual Leads Creation).



Create Leads page

Lead Load Type Select *Audience*,*Campaign*, or *Event*. Depending on which option you select, different options on the page will become available.

Business Unit Select a business unit from the list of choices.

Campaign This option becomes available only if you select *Campaign* in the Lead Load Type field.

Activity This option becomes available only if you select *Campaign* in the Lead Load Type field.

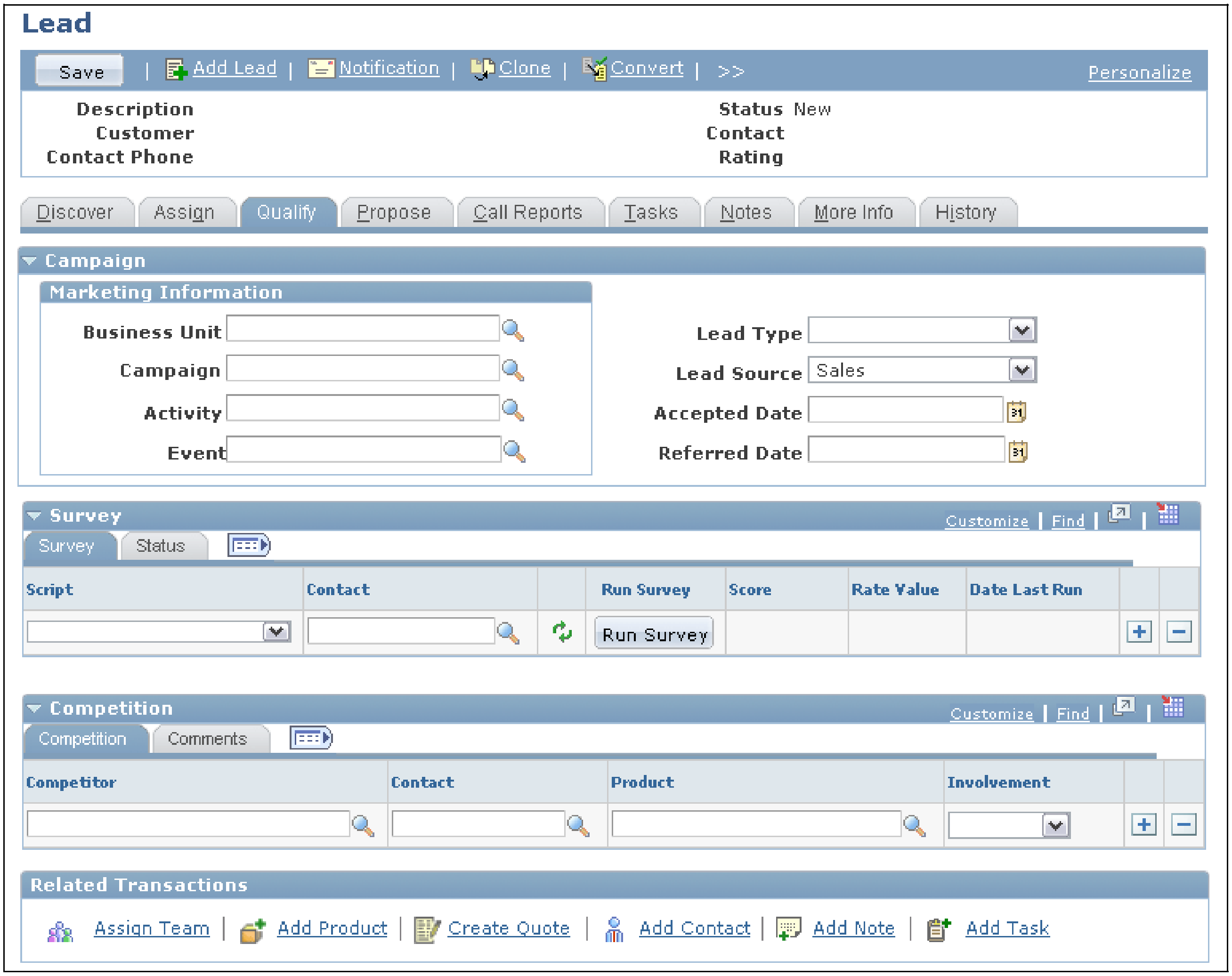
Event This option becomes available only if you select *Event* in the Lead Load Type field.

Audience	This option becomes available if you select *Audience* or *Event* in the Lead Load Type field. Selecting a Lead Load Type of *Audience* allows you to select an audience from an available list; the audience will *not* be associated with an event. If you select a Lead Load type of *Event*, then you must also select an audience. The audiences available for selection in this field are those associated with the event you selected in the Event field.
View Audience	Click this button to view information about the audience associated with the selected Lead Load Type: • If *Campaign* is selected, then the View Audience page shows audiences associated with the selected activity. • If *Audience* is selected, the page displays information about the selected audience. • If *Event* is selected, the page displays information about the event and the audience associated with it.

Note that you cannot load multiple campaigns, or events with audiencesan error message displays if you attempt to do so. You can load multiple audiences: a warning displays, but you will be allowed to continue with the operation.

Manually Associating Leads and Opportunities with Events

Access the Lead Qualify page (Sales, Search Leads, click the Qualify tab).



Lead Qualify page

You can associate Sales leads and opportunities with events. In order for the event metrics to accurately track the number of leads and opportunities generated by the event, you must track every lead that is generated.

If the lead is created from an event or from the Manual Lead Creation process, the relevant event is already assigned to the lead. Otherwise, you can add or update the Event ID on this page to indicate that the lead has been created for this specific event. For example, you might want to create a lead manually if someone attended your event and then later called you indicating that they want to receive more information about the event.

When a lead is converted to an opportunity , the associated event is carried over to the opportunity

Event	Select an event from the available list to associate an event with this lead.
Lead Source	Select *Marketing Event* from the list of choices.

See *PeopleSoft Enterprise Sales 9.1 PeopleBook*, "Creating Sales Leads and Opportunities."

Chapter 5

Analyzing Events

This chapter describes the process for using metrics to analyze events.

Using Metrics

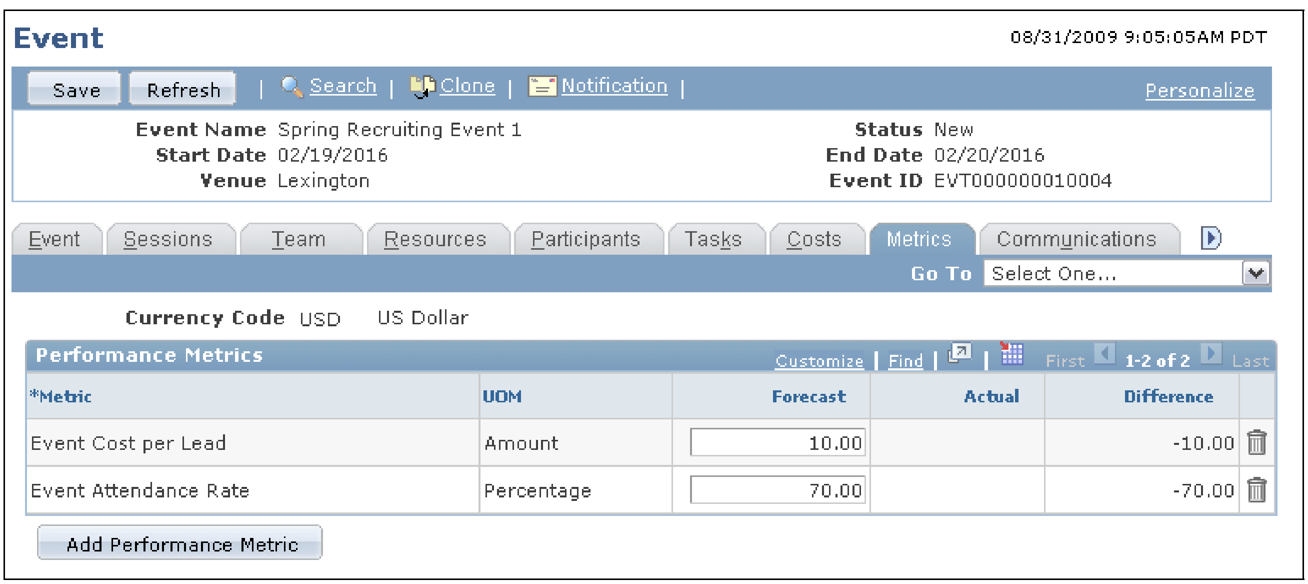
This section describes how to view metrics associated with an event.

Page Used to View Metrics

Page Name	*Definition Name*	*Navigation*	*Usage*
Event - Metrics	RAE_EVENT_METRICS	Click the Metrics tab on the Event page.	View metrics associated with an event.

Using Metrics

Access the Metrics page (click the Metrics tab on the Event page).



Event Metrics page

During the event planning process, marketing managers and marketers set budgets, track costs and forecast the results that are expected of the event. During the last stage of event management, event analysis, marketers can assess event impact, whether or not it was successful and if it met forecasted expectations. The event metrics page is where event analysis can be performed, providing marketerss answers to questions like:

- Was the event outcome (revenue, leads and opportunities generated) worth the cost?
- Did the event generate the leads and opportunities expected?
- How effective was the event promotion and invitation? (response rate)
- Was the event compelling to the target audience? (response rate)
- Were we able to get registrants to show up for the event? Were event reminders effective? Could event logistics have been altered to increase attendance?
- What was the event return on investment?

Metrics

Select a metric from the list of choices. Metrics are calculated when the page is opened, so current values are displayed.

Note. You can define your own metrics using the Metrics - Detail page in PeopleSoft Marketing. Refer to the Marketing documentation for more information.

UOM (Unit of Measurement)

Determined based upon the metric selected.

Forecast Value

This value is entered manually. When the metric is calculated, the system subtracts the actual value from the forecasted value, resulting in the difference value.

Actual Value

The computed value from the metric.

Difference

The Actual Value minus the Forecast Value.

Currency

The Currency Code, as entered on the Events page.

Supported metrics for events include:

- Cost: Total cost of the event.
- Cost per Lead: Total cost of the event divided by the number of leads generated from it.
- Cost per Opportunity: Total cost of the event divided by the number of opportunities generated from it. The number of opportunities is determined by counting all leads generated from the event.
- Number of Leads: The total number of leads generated from the event.
- Number of Opportunities: The total number of opportunities associated with the event.
- Response Rate: The number of registered and waitlisted attendees divided by the number invited, multiplied by 100. Registered and waitlisted invitees are included in this calculation only if their Invited check boxes were selected.

- Attendance Rate: The number of attendees divided by the Capacity, multiplied by 100.
- Percent Requested Not Invited: Those who were not invited who registered directly through the website versus those who were invited and registered.
- No show rate: The number attended divided by the number who registered.
- Revenue: The total revenue received (if applicablefor example, for fundraising events).
- Profit: Revenue minus Cost.
- Cost per Person vs. Revenue.

See Also

PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook, "Setting Up PeopleSoft Enterprise Marketing and TeleSales," Defining and Creating Metrics

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