Oracle® Marketing

Implementation Guide

Release 12.2

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Part No. E49024-01

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Marketing Implementation Guide.*

This guide is intended for members of the vendor organization who are responsible for implementing and administering the Oracle Marketing application.

This guide assumes you have a working knowledge of the principles and customary practices of your business area.

See Related Information Sources on page xiv for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

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2 Oracle E-Business Suite Dependencies

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Related Information Sources

Integration Repository

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

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

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to this Product

Oracle Application Framework Personalization Guide

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

Oracle Applications Multiple Organizations Implementation Guide

This guide explains how Multi-Org Access Control (MOAC) helps the Marketing departments share resources between corporate and regional marketing entities, and control the access of marketing objects between these departments to avoid misuse.

Oracle Content Manager Implementation and Administration Guide

Oracle Content Manager ensures accurate and consistent content across applications by providing a central repository for storing and managing content. Oracle Content Manager integrates with Oracle E-Business Suite to enable the seamless transition of content between applications. This integration facilitates single user sign-on to associate content such as product images, white papers, and newsletters with E-Business objects such as store sections, inventory products, and marketing campaigns.

Oracle iStore Implementation and Administration Guide

This guide enables your business to establish business-to-business (B2B) and business-to-consumer (B2C) electronic commerce (e-commerce). You can learn how to build, test, and launch sophisticated online stores in multiple languages and currencies that can store customer data, provide flexible pricing, track shopping lists, orders and returns, and target different customer segments and organizations. Use this guide to integrate Oracle iStore with other Oracle applications such as Oracle Workflow or Oracle Quoting for added functionality and features.

Oracle Marketing User Guide

This guide tells you how to create marketing programs, execute campaigns across multiple customer interaction channels such as Web, email, direct mail, and telemarketing, and monitor the performance of these programs. With Oracle Marketing, you can generate prospective customer lists and assess the effectiveness of these lists, and manage marketing collateral and marketing budgets.

Oracle One-to-One Fulfillment Implementation Guide

Oracle One-to-One Fulfillment provides Oracle E-Business Suite applications with a centralized mechanism for compiling and distributing information to customers. E-Business Suite applications use the Oracle One-to-One Fulfillment API to compile the personalized content for the fulfillment request and determine the recipients of this content. The content can be cover letters, collateral, or templates with associated queries.

Oracle Proposals User Guide

Oracle Proposals enables you to create templates and use them to create proposals to help position a product or service as a solution to the customer's business needs. You send proposals by email, including supporting documents, to prospective customers. This guide describes how to create templates of different categories and use these to create proposals from a lead in Oracle Sales, an opportunity in Oracle Telesales or Oracle Sales, or a customer in Oracle Telesales. You can also associate a proposal to a campaign activity in Oracle Marketing.

Oracle Sales User Guide

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar tasks.

Oracle Scripting User Guide

Oracle Scripting provides enterprises with scripts of questions and answers to help agents gather data, provide information to customers, conduct web-based marketing research surveys, and help web customers make a decision. You use the Script Author to build a script for execution, the Scripting Administration console to manage scripting files, the Survey Administration console to administer survey campaigns, and the

Scripting Engine to execute scripts.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle E-Business Suite development staff. It describes the UI for the Oracle E-Business Suite products and tells you how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing workflow processes embedded in Oracle E-Business Suite. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep your product working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

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

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

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

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

1

Overview

This chapter covers the following topics:

- Key Benefits
- Functional Areas

Key Benefits

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

Oracle Marketing enables you to accomplish the following:

- **Create and manage demand**
  - Establish and maintain product, service, and brand awareness
  - Track and analyze leads and sales activities
  - Route leads to the "best" channel
- **Improve customer profitability**
  - Understand customer behavior
  - Decrease customer acquisition cost
  - Reduce customer attrition
- **Automate marketing processes**
  - Create and maintain best practices templates
  - Expedite time to market

- **Keep marketing aligned with the overall organization**
    - Align leads, sales, marketing efforts and objectives
    - Distribute marketing information and collateral company wide
    - Provide the marketing team with relevant visibility into other parts of the organization
- **Measure marketing performance**
    - Track spending
    - Provide performance measurements for leads, responses, and revenue
- **Understand the competitive landscape**
    - Provide insight into competitor differentiation
    - Enable price point competition insight

Functional Areas

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

Core Marketing

Oracle Marketing's "core" functionality includes Programs, Budgets, Events, Metrics and Analysis, Deliverables and Price Lists.

For more information about core Oracle Marketing functionality, see the *Oracle Marketing User Guide.*

Campaign Workbench

The Campaign Workbench provides a streamlined user interface that enables you to create and execute campaign activities through various marketing channels (E-mail, direct mail, fax, telemarketing, advertising and Web. The Campaign Workbench also allows you to plan, budget, execute and track your campaigns. Data mining functionality is available to mine the customer database.

Audience Workbench

The Audience Workbench provides you with an intuitive interface to create and manage lists. This workbench displays customer information that is relevant, logical and easy for you to use.

Marketing Intelligence

The Marketing Intelligence component within Oracle Marketing provides comprehensive reports for the purpose of:

- Planning
- Performance monitoring
- Analysis

During the planning cycle, marketing organizations should carefully study the results of their past activities. This provides the basis for any changes they will make to the upcoming activities, as well as the benchmark on which they can forecast their returns in the future. During the execution stage, monitoring performance on a daily basis enables marketing professionals to react to their market needs, test their forecast assumptions and make changes if necessary. Throughout all business cycles, analysis needs to be conducted and analysis always starts with reports that contain accurate, timely data.

Data Mining

Data Mining provides the ability to create predictive models of customer and prospective customer behavior based on historical data. Using these models, you can predict which segments to target for future marketing campaigns. By intelligently targeting only prospective customers with a high propensity to exhibit a desired behavior (e.g., respond to a marketing campaign), you can increase marketing ROI by decreasing the number of contacts and increasing the response rate.

2

Oracle E-Business Suite Dependencies

This chapter covers the following topics:

- Oracle E-Business Suite Dependency Overview
- Mandatory vs. Conditional Dependencies
- Understanding and Setting Up Mandatory Dependencies
- Creating the Implementation User
- Understanding and Setting Up Conditional Dependencies
- Integrating Oracle Marketing and Oracle Discoverer

Oracle E-Business Suite Dependency Overview

Oracle Marketing is a component of the integrated Oracle E-Business Suite. Because of this, you will need to verify that Oracle E-Business Suite dependencies are installed and set up properly for Oracle Marketing. The verification and setup of Oracle E-Business Suite prerequisites is necessary to ensure that supporting functionality and applications infrastructure is in place prior to beginning the Oracle Marketing implementation.

In addition, you can leverage other applications and modules within the Oracle E-Business Suite to provide additional functionality to your Oracle Marketing implementation. For example, if your business requirements mandate that your marketing campaign results be translated into leads, then you can license and implement Oracle Leads Management along with Oracle Marketing. This combined implementation would allow you to analyze and track sales leads as a follow up to your marketing initiatives.

Mandatory vs. Conditional Dependencies

This implementation guide categorizes Oracle E-Business Suite dependencies as follows:

- **Mandatory Dependencies:** Oracle applications and modules that provide underlying infrastructure and support to Oracle Marketing. Implementing these dependencies is required and must be complete before beginning an Oracle Marketing implementation.

For example, the Oracle Trading Community Architecture (TCA) provides a repository for customer and partner information. All customer and partner information used by Oracle Marketing is stored in the TCA tables. Because this information is critical for Oracle Marketing, TCA is a mandatory dependency, and must be setup properly.

- **Conditional Dependencies:** Oracle applications and modules that extend or enhance Oracle Marketing functionality via integration. Implementing these dependencies is conditional based on business requirements and practices, functionality desired, and licensing.

Understanding and Setting Up Mandatory Dependencies

Applications and modules defined as mandatory must be setup prior to implementing Oracle Marketing. The setups, however, are generally partial and limited to basic functions that are specifically needed for Oracle Marketing.

For example, Oracle Inventory is a mandatory dependency for Oracle Marketing's product functionality. However, to enable products for marketing purposes, you do not need a full Oracle Inventory implementation.

See the following sections for more information on setting up mandatory dependencies:

- Setting Up Oracle CRM Application Foundation, page 2-2
- Setting Up Oracle One-to-One Fulfillment, page 2-4
- Setting Up Oracle Applications Object Library, page 2-4
- Setting Up Oracle General Ledger, page 2-4
- Defining the Marketing Calendar, page 2-5
- Setting Up Oracle Human Resources, page 2-5
- Setting Up Oracle Inventory, page 2-8
- Setting Up Product Hub, page 2-8
- Setting Up Oracle Content Manager, page 2-8

Setting Up Oracle CRM Application Foundation

Oracle CRM Application Foundation provides a common infrastructure upon which all

Oracle CRM applications are built. By providing a set of application components, CRM Application Foundation ensures that all applications interact with key business objects in a consistent manner.

Resource Manager

Resource Manager is mandatory for an Oracle Marketing implementation. This component enables you to use application resources regardless of where they are created. Acting as a central repository, Resource Manager enables the creation of various types of resources, groups, teams, and roles.

You can import resources such as employees, suppliers, parties, or partners, created in other applications. Once imported, the resource becomes available for other applications to use.

Resource Manager enables:

- Groups
- Roles
- Role Types
- Employee Import

Task Manager

Task Manager is mandatory for an Oracle Marketing implementation. It provides a mechanism for your application to respond to customer needs in a timely manner. Using Task Manager you can create, assign, manage, sort, and prioritize tasks. To assign a task to a specific user, or logged in user, you need to set the profile **Task Manager: Default Task Owner** at the user level, and the profile value should be the resource name associated with the logged in user. For example, if the resource name is Johnson, then Johnson should be set as the profile value.

After defining a rule and assigning it an appropriate responsibility, if you wish to implement task transition rules, set the profile **Task Manager: Default Task Status** at the user level. You need not set this profile if rules are not assigned to any responsibility. In this case, the status LOV displays all the statuses.

Interaction History

Interaction History is mandatory for an Oracle Marketing implementation. It provides a common framework for capturing and accessing all interaction data associated with customer contact. Acting as a central repository, it provides a consistent API for tracking all customer interactions within the Oracle E-Business Suite.

For example, if using the tracking mechanism within Web marketing, each response (each time a customer responds to a Web ad) is tracked in Interaction History.

Setting Up Oracle One-to-One Fulfillment

If using email, fax, print schedules, email notifications (or if using the features of email notifications on fulfillment rules) Oracle One-to-One Fulfillment is a mandatory setup. The fulfillment engine supports high volume electronic fulfillment of documents.

When implementing Oracle One-to-One Fulfillment, the following conditions must be met:

- Fulfillment Server is created: A Fulfillment Server is an instance of the request processing software.
- Fulfillment Group is created: Fulfillment group is used to group agents (users) together.
- JFT Fulfillment Admin role is assigned to the Implementor: This role gives access to the Fulfillment administration console for setting up fulfillment, creating master documents and viewing request history. This role and responsibility only needs to be assigned to a Marketing user only if he/she will also be administering the Fulfillment activities (for example, setting up Fulfillment servers, agents, etc.). Typically, only a Marketing Administrator is involved in these activities.
- AMS: Enable Fulfillment is set to Yes

Consult Oracle One-to-One Fulfillment documentation for more information.

Setting Up Oracle Applications Object Library

Oracle Applications Object Library (AOL) 12.0 enables a multiple language and currency setup for the Oracle Marketing implementation. After being enabled, you can determine the set of languages and currencies to be used.

For more information see *Oracle E-Business Suite Concepts* and *Oracle E-Business Suite Setup Guide*.

Setting Up Oracle General Ledger

Basic accounting information for Oracle Marketing is provided by Oracle General Ledger (GL). Because Oracle Inventory requires at least one organization and associated set of books, at least one business unit must be created in GL.

To implement GL for Oracle Marketing, you must setup the following:

- Accounting Calendar Types
- Accounting Calendar
- Currencies

- Currency Conversion Rates
- Currency Conversion Rate Types
- Set of Books

Defining the Marketing Calendar

The Marketing Calendar defined by this task becomes a value in the LOVs for the profile **AMS: Marketing Calendar.**

To define the Marketing Calendar, log in to Oracle Forms with System Administrator responsibility.

Navigation: Profile > System

Notes

- **Application:** Specify the application for which you want to define the Calendar.
- **Profile:** Search and select the AMS: Marketing Calendar profile.
- **Site Level:** You can view available AMS: Marketing Calendar options. Select the appropriate Accounting Calendar.

For information about creating the Marketing Calendar, see Setting Up the Marketing Calendar, page 3-14.

Setting Up Oracle Human Resources

The Oracle Human Resources Management System (HRMS) stores information related to your organization. For detailed Oracle HRMS information, consult *Using Oracle HRMS - The Fundamentals*.

For an Oracle Marketing implementation, see the following sections for information on the HRMS setups that must be performed:

- Determining the HRMS Navigation Path, page 2-6
- Creating Lookup Values for Organization Type, page 2-6
- Creating Locations, page 2-6
- Creating Business Groups, page 2-6
- Creating Organizations, page 2-7
- Assigning Security Profile, page 2-7
- Adding a Legal Entity, Operating Unit, and HR Organization, page 2-7

- Creating a Business Unit, page 2-8
- Assigning Multi Org Responsibilities, page 2-8

Determining the HRMS Navigation Path

The responsibilities and navigation paths for performing HRMS tasks is different depending on the terms of your license (shared vs. full).

- **Shared HRMS lisence**: Create employees using CRM Foundation.
  - **Responsibility: CRM Administrator**
  - **Navigation Path: CRM Foundation > Resource Manager > Maintain Employees > Employees**
- **Full HRMS lisence:** Create employees using HRMS.
  - **Responsibility**: **HRMS Manager**
  - **Navigation Path: People > Enter and Maintain**

Creating Lookup Values for Organization Type

In this step you are creating sub organization types. For example, if the organization is divided into business groups, then create an organization type called Business Group.

This procedure adds values for a specific lookup "Organization Types (ORG_TYPE)". If the organization is divided into subsidiaries, create an organization type called Subsidiary.

Creating Locations

In Oracle HRMS, you will set up each physical site where your employees work as a separate location. You can set up:

- Global locations: Available in all Business Groups.
- Business Group locations: Available in one Business Group.

Similarly, you enter the addresses of external organizations that you want to maintain in your system, such as employment agencies, tax authorities, and insurance or benefits carriers. When setting up internal or external organizations, you select from a list of these locations.

Creating Business Groups

The business group is the largest organizational unit representing the enterprise. A Business Group may correspond to a company or corporation, or in large enterprises, a holding or parent company. It can be an organization with a physical location, or it may be an abstract representation of a legal entity that employs people assigned to work in organizations beneath it.

A default business organization has been set up for you, therefore this step is not required for Oracle Marketing to be fully operational. However, you must set up an organization if you plan to use any financial ERP applications in the future.

Creating Organizations

The first organization to set up is the Business Group and all other organizations will belong to it. Below the Business Group, you represent the groupings in which employees work, such as branches, departments or sections, by means of internal organizations. To enable the assignment of employees to an internal organization, you classify it as an HR Organization.

Assigning Security Profile

In this step, you will be defining the security level for specific Marketing Responsibilities. To do this, use the profile **HR: Security Profile**. This profile enables access (based on responsibility) to a single business group.

Notes

- **HR: Security Profile, Site level:** The organization selected is the business group that users will have access to. They will have access only to records within this business group.

- Validate that the setting for HR: Business Group is the same organization as the HR: Security profile.

Adding a Legal Entity, Operating Unit, and HR Organization

To perform the HRMS task of creating a Legal Entity, Operating Unit, Organization use the following information:

Prerequisites: Appropriate HRMS Manager responsibility

For more information on determining this, see Determining the HRMS Navigation Path, page 2-6.

Adding a Legal Entity Notes

- **Organization Classification Name:** Enable GRE / Legal Entity and select a Set of Books

Adding an Operating Unit Notes

- **Classification:** Is used to determine the purpose and use of the Operating Unit

Adding an HR Organization Notes

- **HR Organization:** The organization to which employees are assigned

Creating a Business Unit

A business unit is an organization such as a plant, warehouse, division, department, and so on.

Notes

- **Organization Classification:** Is used to determine the purpose and use of the organization

Assigning Multi Org Responsibilities

Oracle Marketing requires the implementation of a Multiple Organization Structure. Please refer to *Oracle Applications Multiple Organizations Implementation Guide* for additional information.

You will assign Multi Org responsibilities to a selected Oracle Marketing responsibility. This displays the appropriate Business Unit when using that responsibility.

Setting Up Oracle Inventory

Oracle Inventory serves as the repository for items that can be used in Oracle Marketing. Items stored in Oracle Inventory reside in the MTL_SYSTEM_ITEMS table.

Oracle Inventory requires one inventory organization to be identified. Typically this is the Master Inventory Organization. If you need to separate products (sold from each operating unit) into different inventory organizations, create a separate inventory organization for each operating unit.

Implement Oracle Inventory as described in the *Oracle Inventory Implementation Guide*.

Setting Up Product Hub

Oracle Marketing derives its product data using the product catalog provided by Product Hub. Product Hub provides a product hierarchy located in the OLTP schemas. This hierarchy is maintained by the user in a product catalog and is expanded to a de-normalized table (designed for efficient traversal) by the Oracle Sales and Marketing applications.

For more information about implementing Product Hub for Marketing see Implementing Oracle Product Hub, page 2-8.

Setting Up Oracle Content Manager

Oracle Content Manager (OCM) is the content management system for Oracle Marketing. OCM has a central repository that manages the content types using folders, versions, and translations. You can work with outbound collateral content for non-direct marketing activities such as advertising, in-store and press activities. You can set up, define, and attach media clips, print ads, and other offline media for use in the Campaign activities. And for leads generated on such advertising activities, you can preview the Outbound Collateral for efficient lead follow up. By providing content management building blocks, Oracle Marketing stores the following content in OCM:

- **Attachments:** Stored in the default folder set up in OCM. When a user adds attachments to a cover letter, by default they are created in this folder. The user can change the folder to store attachments in the user interface. Attachments for emails are stored in the folder 'Attachments'.

- **Marketing Cover Letters:** Stores Fulfillment Cover Letters (also referred to as Templates) used in Oracle Marketing in the default folder created in OCM. When a user creates a cover letter, he or she has an option to change this location. The appropriate option in this drop-down is: OMO Directory and all its subdirectories excluding Requests subdirectory.

- **Queries:** Stores all the fulfillment Queries defined in Oracle Marketing in the default folder created in OCM. When a user creates a custom fulfillment query using the Oracle Marketing Admin screens, by default the content is stored in this directory. The user can change this folder if required.

- **Deliverables:** Stores all deliverable e-mail content in the default folder created for it in OCM. When a user creates e-mail content for the marketing deliverable object, by default it is created in this directory.

- **Print Advertisement:** Stores all web advertisements defined in Oracle Marketing in the default folder created in OCM. The user can change this location during the print advertisement creation flow.

- **Media:** Media related files such as .wav files and billboard content are stored in the default folder created in OCM. This is used for non-direct marketing activities such as television spots and radio commercials.

For more information on how OCM is integrated with Oracle Marketing for direct marketing fulfillment, see Fulfillment Setup, page 11-1 in Implementing and Administering Direct Marketing Fulfillment.

Creating the Implementation User

Each user (or type of user) has a specific collection of responsibilities. Before assigning responsibilities to a user, the employee must be created in the HRMS. After the employee has been created, you can create the user and assign responsibilities and a default application ID.

To create marketing users:

1. Create the employee

2. Define a User by adding responsibilities

3. Set the default application and responsibility

4. Import the employee

5. Grant access to Audience and Administration tabs

6. Update group access

Creating the Employee

The first step in creating a user is creating the employee in HRMS.

Prerequisites: HRMS Manager Responsibility

Navigation: People > Enter & Maintain

Notes

- **Social Security #:** The information entered here will be checked against existing social security information

Assignment Region Notes

- **Update:** Use to create a new record

- **Correction:** Use to revise existing data

Defining a User by Adding Responsibilities

After creating the employee in HRMS, you can add responsibilities to it.

Based on your functional requirements, add one or more responsibilities to your user.

Navigation: Security > User > Define

For more information about creating Marketing users see:

- Setting up Campaign Users, page 6-2

- Setting Up Audience Users, page 4-2

Customizing Dashboard

The Campaign Dashboard allows you to review key marketing initiatives, such as activities, campaigns, and lists. It allows managers to review the performance of the current or past initiatives, and displays the campaign performance data. For daily operations, this page also provides easy access to the recent campaigns and activities and allows navigation to all other marketing functions that a user can access based on the responsibility you assign.

The dashboard allows the user to access initiatives through tabs such as Short Cuts, Quick Actions, and Related Links. Alternatively, it also allows search options such as

New Search, Saved Search, and Quick Find.

You can search for the following initiatives:

- Activity: Retrieves campaign activities including events.
- Campaign: Retrieves a campaign.
- List: Retrieves a list.
- Model: Retrieves predictive models for a campaign.
- Program: Retrieves all the programs in a campaign.
- Scoring Run: Retrieves the scoring run of a campaign.
- Source Code: Retrieves the source code of a searched initiative.

> **Note:** Scoring run and Source Code are retrieved only through the New Search option.

Hidden Campaign and Activity Attributes

When a user logs into the Campaign Workbench and creates a new campaign, the campaign is in the New Status. This campaign contains basic campaign attributes that the user may update based on the locking rules set by a Marketing Administrator. The same holds true for activity creation. However, a few basic attributes are hidden by default, depending on the user responsibility. You need to log in as the Marketing Administrator and enable these attributes for the users to see them. For more information on Locking Rules, see Implementing Locking Rules, page 6-21.

The following attributes are hidden in the Dashboard:

- Purpose
- Start and End Dates
- Inherit the Source Code from Parent
- Triggered by Monitor

  This activity attribute is hidden only if the activity is triggered based on a monitor. For more information on Monitors, see Implementing Monitors, page 6-29.

Seeded Dashboard Bins

The Campaign Workbench consists of sections or bins with operational data for the user. This data contains past or present program and/or campaign performances and enables the user to track the progress of campaigns and activities. It helps the user navigate the Workbench better.

The table below lists the sections.

Seeded Bins

Bin Name	Description
Campaign Gantt Chart	Enables the user to review the time-line for the Campaigns retrieved based on the view selected by the user. The user can expand the Gantt chart for the Campaign Activities of each Campaign listed in the bin. The Gantt chart is hidden by default. You need to log in as the Administrator and enable this bin for a specific site and place it as the first bin in the Dashboard if required.
Open Tasks	Enables the logged in user to see the open tasks associated with a campaign and activity that he or she owns or the team has access to.
Triggered Monitors	Displays the monitors in the Triggered status. The user can check the condition of the initiatives associated with the triggered monitors.
Campaigns	Displays the campaigns retrieved based on the view selected by the user. The user can personalize this bin and search for specific campaigns and campaign attributes to review.
Trend Chart	Displays the marketing trend for a selected Metric of the top five campaigns listed in the Campaigns Bin view.
Activities	Displays the activities retrieved based on the view selected by the user. The user can personalize this bin and search for specific activities and activity attributes to review.
Recently Updated Campaigns	Displays the campaigns recently updated by the logged in user.

Recently Updated Activities	Displays the activities recently updated by the logged in user.
Shortcuts	The user can access the marketing functions on the Dashboard by clicking the shortcuts links.

OA Personalization in Dashboard

The Campaign Workbench provides personalization options for each section or bin. The user can navigate to the standard OA Personalization Page where he or she can create personalized views to search for and select Campaigns and/or Activities. The personalization options are available as links in each bin. For example, for the bin 'Active Activities', a link 'Personalize Activities Bin' is available.

Enabling Hidden Shortcuts

The Shortcuts links on the right side of the dashboard enable users to easily navigate to their desired initiatives. However, the following links are hidden by default depending on the user responsibility:

- Create Program
- Create Campaign

To enable the Create Program and Create Campaign links, you need to edit the JRAD XML file CampDashNavigationv2RN.xml from the webui directory in the following path: oracle/apps/ams/mds/campaign. The 'rendered' attributes for these two links should be set to 'True' instead of 'False'.

Setting the Default Application and Responsibility

You can assign a default application and default responsibility to the Implementation user.

Notes

- In the Find System Profile Values Form, at the User Level, search for the user who will be assigned to this application and responsibility.
- **Profile:** enter JFT%DEFAULT%.
- **JTF_PROFILE_DEFAULT_APPLICATION:** Set this to 530
- **JFT_PROFILE_DEFAULT_RESPONSIBILITY:** Set this to 21706 (Oracle Marketing Super User)

Importing the Employee

Log in to Oracle Forms with CRM Administrator responsibility. Locate and import the employee as a Resource. Accept the default values. Remember to record the transaction number.

Navigation: Resource Manager > Maintain Resources > Import Resources

Updating Group Access

Run the Concurrent Program **AMS: Group Access Refresh** to complete the process of creating the Implementation user.

Understanding MOAC

Marketing departments have global and regional operations at their respective levels. But they are not always synchronized with their financial structure. They use their resources such as audience, budgets, and campaign activities, without being able to share the resources globally. Despite a need to share resources between corporate and regional marketing entities, there is also a need to control the access of marketing objects between these departments to avoid misuse. Multi Org Access Control (MOAC) helps the Marketing departments achieve this goal.

Oracle Marketing does not use the MOAC functionality to implement access control, or create financial transactions in any of the financial applications. However, it is aware of MOAC and stores Organization IDs for marketing objects, which are used to set the Default Operating Unit for a marketing object while creating a budget for that object. The current profile **MO: Operating Unit** is replaced with two new profiles: the Security Group Profile and the Default Operating Unit profile. The Oracle Marketing Administrator must derive the operating unit from the Default Operating Unit profile for the user.

Understanding Sales Methodology

Sales Campaigns help sales managers generate sales growth and equips them to explore their install base and historical customer data, and to mine that data for cross-sell and up-sell opportunities. Sales managers can quickly create and execute campaigns to push these opportunities out to their territories, along with a coordinated sales methodology. These opportunities are considered for marketing purposes such as list generation, queries, and creating data sources for Audience management.

Organizations can create sales methodologies that match their requirements for different product lines, sales channels, organization units, or marketing campaigns. You can access these sales methodologies when you create and manage leads and opportunities. Each stage of the methodology has a sales wizard, called the coach, which comprises a series of questions regarding that sales stage, or provide you with sales stage information. The sales coach assists you by reminding you of points and issues to consider and procedures to follow during the sales effort. Additionally, you can export summaries of the sales coach data into printable worksheets that can be used during review meetings and training sessions. For more information on sales methodologies, refer to the *Oracle Sales User Guide*.

Understanding and Setting Up Conditional Dependencies

Oracle Marketing's conditional dependencies can be categorized as follows:

- **Optional Marketing and Partnering Enhancements:** Additional modules that are implemented along with Oracle Marketing that are part of the Oracle Marketing and Partnering product family.

For example, you can purchase Oracle Trade Management (which is part of the Oracle Marketing and Partnering family of applications) to implement along with Oracle Marketing. This is an optional component that enables advanced budgeting, claims, claims settlement, and trade planning.

- **Optional Integrations:** Applications implemented in addition to Oracle Marketing. Any application that is not part of the Oracle Marketing and Partnering product family.

For example, Oracle iStore can be implemented along with Oracle Marketing. Used in conjunction with Oracle Marketing, iStore provides a Web storefront for online Web advertisement and execution. This functionality is optional, is not required for Oracle Marketing to function properly, and is therefore considered an optional integration.

Optional Marketing and Partnering Enhancements

When implementing basic Oracle Marketing, you can optionally implement additional Marketing and Partnering applications.

The following can be implemented with Oracle Marketing:

- Oracle Trade Management, page 2-16
- Oracle Partner Management, page 2-16
- Oracle Leads Management, page 2-16
- Oracle Territory Manager, page 2-16
- Oracle Web ADI, page 2-17
- Oracle Receivables, page 2-17

Oracle Trade Management

Designed for the consumer goods sector, Oracle Trade Management provides additional B2B functionality used to:

- Control costs related to promotions
- Track deals made with retailers, distributors or partners
- Process claims and deductions
- Automate and track funds management and promotional spending

> **Note:** Oracle Trade Management must be purchased separately.

For Oracle Trade Management implementation details, see the *Oracle Trade Management Implementation Guide*.

Oracle Partner Management

Oracle Partner Management assists an organization in maintaining, tracking, managing, and communicating with its partners. When implemented with the rest of the Oracle E-Business Suite, you can manage leads, track and share opportunities with partners, forecast sales, manage partner and customer information, send outbound information, and calendar activities, tasks and notes.

> **Note:** Oracle Partner Management must be purchased separately.

For Oracle Partner Management implementation details, see the *Oracle Partner Management Implementation and Administration Guide*.

Oracle Leads Management

Oracle Leads Management enables you to automate and optimize prospect-to-sales conversion across the enterprise. Leads Management provides a staging area for all prospect leads for data quality processing, prioritization and distribution, enterprise review, and conversion. When implemented in conjunctions with the rest of the Oracle E-Business Suite, Oracle Leads Management enables you to effectively convert prospects into sales by tracking lead activity, aging, and closure.

> **Note:** Oracle Leads Management must be purchased separately.

For more information see the *Oracle Leads Management Implementation and Administration Guide*.

Oracle Territory Manager

Implementing Oracle Territory Manager is optional. It provides an infrastructure to define territories based on flexible criteria, such as geography, zip code, area code. This engine creates automatic assignment of transactions across the entire CRM suite. For example, leads and opportunities are routed through this engine to the appropriate sales professionals.

See *Oracle Territory Manager Implementation Guide* for more information.

Oracle Web ADI

Web Applications Desktop Integrator (Web ADI) brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data. Data entry shortcuts (such as copying and pasting or dragging and dropping ranges of cells) or even using formulas to calculate amounts, can all be used to save time. You can combine speed and accuracy by invoking lists of values for fields within the spreadsheet. After editing the spreadsheet, you can use Web ADI's validation functionality to validate the data before uploading it to the Oracle E-Business Suite. Refer *Oracle Web Applications Desktop Integrator Implementation and Administration Guide* for information on Web ADI implementation.

Oracle Marketing integrates with Web ADI to provide marketers with a spreadsheet interface to create and update campaign activity data. For more information on implementing Web ADI for Marketing, see Implementing and Administering Web ADI Integration.

Oracle Receivables

Oracle Marketing uses Oracle Receivables to record customer information. Customer registration information is maintained in the Trading Community Architecture (TCA). TCA stores all customer, partner, prospect, and other customer related information in a single repository. This enables consistent message delivery across all channels.

Setting up Oracle Receivables is optional, and customers can set it up for tax options and address validation, as described in the *Oracle Receivables User Guide*.

Optional Integrations

Optionally, Oracle Marketing can be integrated with a variety of other applications to extend its functionality. The following is a list of common integration points for Oracle Marketing:

- Integrating Oracle Data Mining and Oracle Marketing, page 2-18
- Integrating Oracle Marketing and Oracle Sales Online, page 2-18

- Integrating Oracle Marketing and Oracle Telesales, page 2-18
- Integrating Oracle Marketing and Oracle Interaction Center (Scripting), page 2-19
- Integrating Oracle Marketing and Oracle *i*Store, page 2-19
- Integrating Oracle Marketing and Oracle Discoverer, page 2-21

Integrating Oracle Data Mining and Oracle Marketing

Data Mining is an analytic feature providing a complete enterprise view of the Oracle Marketing business flows. Using extensive analytical and reporting capabilities, all personnel within and organization can monitor the status of marketing activities in real time. Data Mining functionality is included in an Oracle Marketing license. However, the decision to implement fully is optional.

Integrating Oracle Marketing and Oracle Sales Online

Oracle Sales Online (OSO) is an application designed for field sales representatives, sales managers, and executives. The application provides a complete set of tools that enables sales teams to manage the sales cycle from beginning to end. OSO supports the key functions of the sales cycle, with features such as:

- Lead and opportunity management
- Forecasting
- Quote generation
- Order placement
- Sales methodologies

When integrated with Oracle Marketing, the critical link in the Campaign to Cash business flow is fulfilled, providing the information to analyze the success of company campaigns. The system enables campaign to cash flow tracking as the source code can be tracked from campaigns to orders.

When integrated, you can also create Sales campaigns as a Sales tool to quickly create and execute cross sell/up sell campaigns that target existing customers.

For more information about implementing and using Oracle Sales Online, see *Oracle Sales Implementation Guide.*

Integrating Oracle Marketing and Oracle Telesales

Oracle Telesales (OTS) is an application designed for inside sales professionals, inbound telesales agents, or outbound telemarketing agents. OTS offers a multi-channel selling solution that manages leads, opportunities and forecasts across all sales channels: over the phone, the Web or through mobile devices. It provides a set of tools to help the inside sales team manage the sales cycle from prospecting for customers to booking the order.

When integrating Oracle Marketing and Oracle Telesales, marketers can use the Oracle Marketing List Import feature to assign lists to TeleSales Agents. A TeleSales agent can then use the Universal Work Queue to access the list of customers assigned to them by the marketing team. For implementation details see Implementing List Import for Universal Work Queue, page 4-44.

Integrating Oracle Marketing and Oracle Interaction Center (Scripting)

Oracle Interaction Center is an integrated series of products designed for consistent and effective handling of customer interactions. It provides sophisticated routing, media queuing and enhanced screen pops integration. Interaction center reduces the cost, complexity and risk associated with deploying applications. Interaction Center consists of the following modules:

- Advanced Inbound
- Advanced Outbound
- Email Center
- Interaction Center Intelligence
- Scripting
- Universal Work Queue

Oracle Scripting is a set of tools to facilitate the process of gathering of information through guided decision flows, consisting of text, questions, and answers. Oracle Scripting is composed of several components: the Script Author, the Scripting Engine, the Scripting Administration console, and the Survey Administration console.

Integrating Oracle Marketing and Oracle *i*Store

When Oracle Marketing and Oracle *i*Store are integrated, you can use the eMerchandising module of Oracle Marketing to personalize Web advertisements for Oracle *i*Store. Using this functionality, a marketer can make recommendations for customers. Store personalization and customer-specific recommendations are accomplished through specialty store Web postings from eMerchandising and store Event capture.

Integrating Oracle Marketing and Oracle Web ADI

Web Application Desktop Integrator or Web ADI is a tool that brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. For Oracle Marketing, the worksheet provides a quick and simple means to create and update multiple campaign activities from the Campaign Workbench, within and across campaigns.

Use the following sections to implement and administer Web ADI for Marketing use:

- Implementing Web ADI Integration
- Administering Web ADI Integration

Implementing Web ADI Integration

To implement the Web ADI integration, you need to run the following concurrent programs:

- **AMS : Schedules Import:** this is used to import new schedules
- **AMS: Media Planner Loader:** this is used to map metrics data from the interface table to schedule metrics. If metrics already exist for the schedule, the metric values are updated. If the metrics do not exist, new metrics are created for the schedule.

Administering Web ADI for Marketing

To administer Web ADI for Oracle Marketing, see the following sections:

- Web ADI Templates
- Customizing Web ADI Templates
- Security Requirements for Web ADI

Web ADI Templates

A Web ADI template is a combination of a spreadsheet interface consisting of a set of columns, the mapping of attributes from each of these columns to the appropriate column in the underlying data store, and the logic to create or update the data with the necessary validations.

As an administrator, you can customize Web ADI templates for marketing use. See Customizing Web ADI Templates.

Seeded Web ADI Templates

The seeded Web ADI templates include:

- Media Planner

  This template can be used for working with metrics for a large number of Campaign activities.

- Schedule Metadata Mass Update Worksheet

  This template can be used for mass update of basic identifying schedule attributes. Sample scenarios where this template may be used:

- The marketing manager needs to adjust the dates of the Campaign Activities for a specific Campaign for which the dates have changed
- The marketing administrator needs to mass update the ownership of campaign activities when the current owner leaves the marketing department
- The marketing manager needs to cancel a set of campaign activities

Customizing Web ADI Templates

To customize a Web ADI template, you can copy a seeded Web ADI template, make the necessary changes to it, and save it as a new Marketing usage specific layout.

Integrating Oracle Marketing and Oracle Discoverer

Oracle Discoverer is a business intelligence/analytics application that is often implemented with Oracle Marketing for list management purposes. Oracle Marketing supports Discoverer 10.1.2.

When implemented, a Discoverer end user layer (containing Oracle Marketing business areas) can be launched from within the Oracle Marketing application. Using this interface, a list manager can create and manage workbooks and worksheets needed for list management purposes.

You can create a list of person and organizational contacts -- and the organization information can be part of the attribute in organization contact list. When creating a list from Discoverer, you will need to select a mandatory identifier, which is a constant key. The other fields including "include organization", "include email", etc. are optional depending on what kind of list you want to generate.

To implement Oracle Discoverer for Oracle Marketing purposes, use the procedures below. After performing these procedure, Oracle Discoverer launches with a single sign-on from within Oracle Marketing.

Setting Discoverer Profile Options

Set the following profile options.

Discoverer Profile Options

Option	Required	Level	Setting	Effect/Limitatio n
ICX: Discoverer End User Layer	Yes	Site	User Defined	EUL prefix for Discoverer, usually EUL4.

Option	Required	Level	Setting	Effect/Limitation
ICX: Discoverer Launcher	Yes	Site	User Defined	URL to launch Discoverer Web version.
ICX: Discoverer Viewer Launcher	Yes	Site	User Defined	URL to launch Discoverer viewer.
ICX: Discoverer Use Viewer	Optional	Site	Yes/No	Whether to use viewer instead Web Discoverer. Defaulted to No.

Creating and Verifying Discoverer List Lookups

This procedure will populate the LOV for the List functionality.

Lookups for Lists

Key	Type	Seeded Values	Meanings
AMS_LIST_ ACT_TYPE	User	Employee List List	Target group list selection type.
AMS_LIST_ DEDUP_ TYPE	User	List Import Consumers Import Organizations	Type of Deduplication Rules to be applied.
AMS_LIST_GENERATION_TYPE	System	Full Refresh Append New Records Update Attributes Only	Full refresh of all the entries. New entries meeting the criteria added. Only the attributes of the entries updated.

Key	Type	Seeded Values	Meanings
AMS_LIST_ ROW_ SELECT_ TYPE	System	Nth Record Random Standard	How to select rows during list generation. Standard is top down selection.
AMS_LIST_ SEGMENT_ STATUS	User	Archived Available Cancelled Draft Expired	Archived Available Cancelled Draft Expired
AMS_LIST_ SEGMENT_ TYPE	System	Workbook SQL	Two types of segments supported. Based on a Discoverer workbook or an SQL statement.
AMS_LIST_ SELECTION_ ACTION	System	Include Exclude Intersect	How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list.
AMS_LIST_ SELECTION_ TYPE	System	Segment Workbook Import List List SQL	Segment Workbook Import List List SQL

Key	Type	Seeded Values	Meanings
AMS_LIST_ STATUS	System	Archived	Archived
		Available	Available
		Cancelled	Cancelled
		Draft	Draft
		Executed	Executed
		Executing	Executing
		Generating	Generating
		Locked	Locked
		New	New
		Pending	Pending
		Reserved	Reserved
		Scheduled	Scheduled
		Validated	Validated
		Validating	Validating
AMS_LIST_ TYPE	System	Manual List Standard List Suppression List Target Group	List of possible list types. Note where these appear in the program.

Running Concurrent Programs for Lists

Run the following Concurrent Programs for Lists:

Concurrent Programs for Lists

Concurrent Manager	Required	Description
AMS : Refresh Party Market Segments	Optional	Generates a list of parties in the segment. This program also updates the size information for all segments so a history of segment sizes may be maintained.
AMS : Generate Suppression list	Optional	Updates and maintains organization defined suppression lists. This is in addition to seeded suppression lists.
AMS : Purge Target Group	Optional	After a target group has been generated and used, this program lets a user purge the list entries.
AMS : Purge Imported List	Optional	During the import process, the user may specify an expiration date or number of uses for a list. This program removes those entries whose expiration date has passed or number of uses reached. Optional Parameter: force_purge_flag. This parameter indicates whether to purge a record regardless of the associated campaign status. The default value is No.

Concurrent Manager	Required	Description
Workflow Background Process	Required	The System Administrator must run this program. It populates List generation and target Group Generation data. Parameters: Item Type: AMS List Generation Process Deferred: Yes Process Timeout : yes Process Stuck: yes Ignore Minimum and Maximum Thresholds

Creating the Discoverer End User Layer

To create the Discoverer End User Layer (EUL), you must create a database user and give the appropriate Applications (APPS) grants to that user. This sets the Discoverer End User Layer (EUL) for all APPS.

For specific information about Installing Oracle Discoverer, see *Oracle Discoverer Implementation Guide* .

To create the Oracle Marketing EUL for Discoverer, Oracle Marketing and Oracle Discoverer must be installed. Use the following steps to create an EUL.

1. Open a DOS prompt.

2. Navigate to the directory where Oracle Discoverer Admin edition is installed. For example, if Oracle Discoverer Admin is installed in D:\orant\discvr10, type:

   a) d:

   b) cd\orant\discvr10

3. If the database schema has not previously been created, run the following:

   $ORACLE_HOME/bin/eulapi \

   /CREATE_EUL

   /APPS_MODE

   /CONNECT system/<password>@<db>.

   /USER <EUL_User_Prefix>_US

/PASSWORD eul

/DEFAULT_TABLESPACE <default tablespace>(enter your tablespace names in place of "<default tablespace>")

/TEMPORARY_TABLESPACE <temp tablespace>(enter your tablespace name in place of "<temp tablespace>")

/EUL_LANGUAGE US

/APPS_GRANT_DETAILS <FNDNAM>/<FNDNAM password> (enter your Oracle Applications Foundation username and password for "apps" and "apps" respectively).

4. If the database schema has previously been created, run the following:

   dis51adm.exe

   /CREATE_EUL

   /APPS_MODE

   /CONNECT eul_us/eul_us/eul@tst115rw (The "eul_us" should be the name of the database schema previously created.)

   /APPS_GRANT_DETAILS apps/apps (username and password)

   /SHOW_PROGRESS

Importing the Discoverer EUL

The Oracle Discoverer End User Layer (EUL) contains the Oracle Marketing Business Areas. By importing the Discoverer EUL, these business areas become available for List Management. Alternatively, you may manually import the EEX files from the Oracle Discoverer Admin interface. Before you import the EUL, ensure that the MKS Toolkit is implemented.

Use the following steps to import the Discoverer EUL:

1. Start the Korn Shell (MKS Toolkit).

2. From the NT box where Discoverer Admin is installed map the $AU_TOP/discover directory or copy the eex files to the NT box and specify this directory as 'topdir' directory when running the utility.

3. APPS User/Responsibility must be specified for import. The imported workbooks will be saved under the specified APPS User.

4. On the new EUL make sure the APPS User does have full access privileges to use Discoverer Admin Edition.

5. Use the parameter file so that you don't have to specify all values on the command

line.

```
sh adupdeul.sh
connect=<username/password{@<two_task>}
connect=<username/password{@<two_task>}
resp=<APPS responsibility name>
gwyuid=<APPS GWYUID>
fndnam=<APPS FNDNAM>
secgroup=<APPS responsibilty security group>
topdir=<top level directory where discoverer
files are available>
eulprefix=EUL
language=<NLS language code>
eultype=<OLTP|EDW> default OLTP
{   parfile=<name of parameter file>             }
{      mode=<COMPLETE or DRIVER> default DRIVER> }
{    driver=<list of driver files to be loaded
separated by a "," (comma)> }
{   exedir=<directory where discoverer executables are located>}
{   logfile=<log file name, default adupdeul.log> }
```

Example

Copy the directory $AU_TOP/discover/US to C\bblock\import\au_top\discover\US.

6. With Admin Edition connect as EUL owner EUL4_US/EUL@mydb and grant privileges for Admin Edition to apps user SYSTEST.

7. In Korn Shell CD C\bblock\import

8. Specify parameter values in a parameter file, for example:

```
parfile.lst
eulprefix=EUL
exedir=D/orant/discvr10
mode=COMPLETE
topdir=/user1/au_top/discover
eultype=OLTP
fndnam=APPS
gwyuid=APPLSYSPUB/PUB
resp="Business Views Setup"
secgroup="Standard"
```

9. Start the full import, all eex files in the topdir.

```
sh adupdeul.sh
connect    = systest/welcome98@mydb
parfile   = parfile.lst
language  = US
logfile   = import_complete_eul_us_cust120.log
```

Or start the import for just the files of specified ARU copy file drivers.

```
sh adupdeul.sh
connect    = systest/welcome98@mydb
parfile   = parfile.lst
language  = US
mode      = DRIVER
driver    = c1641981.drv
logfile   = import_c1234567_eul_us_cust120.log
```

10. For the first time to import, it is recommended to use mode=COMPLETE.

11. Set the following ICX profiles in Oracle Applications at the responsibility level:

    ICX _PROFILE ICX_DISCOVERER_LAUNCHER

    URL that points to the Web Discoverer Server

    Example

    http://<HTTP Server>:<port>/discoverer/plus?Connect=[APPS_SECURE]

    ICX _PROFILE ICX_DISCOVERER_VIEWER_LAUNCHER

    URL that points to the Discoverer Viewer

    Example

    http://<HTTP Server>:< port>/discoverer/viewer?Connect=[APPS_SECURE]

    ICX_PROFILE ICX_DEFAULT_EUL

    This in combination with the language code make up the EUL owner at runtime. Example EUL (not EUL4_US)

3

Implementing and Administering Oracle Marketing Common Components

This chapter covers the following topics:

- Common Component Overview
- Implementing Common Components

Common Component Overview

As the Oracle Marketing Implementor and/or Administrator, you are responsible for setting up and maintaining the common components within the application. Common component is defined as a feature or functional behavior that applies to the entire application.

Implementing Common Components

The following common component setups must be completed:

- Setting up Common Component Profiles, page 3-2
- Running Concurrent Programs for Common Components, page 3-10
- Implementing Marketing Users, page 3-11
- Implementing Marketing Responsibilities, page 3-13
- Setting up Tasks, page 3-14
- Setting up Calendar, page 3-14

Setting Up Common Component Profiles

Set the following profile options as they apply to your implementation:

System Profiles for Common Components

Option	Required	Level	Setting	Effect/Limitation
AMS : Admin Group	Yes	Site	Select from any group defined in JTF Resource Groups	Resources that are part of this group will have full access to all Campaigns, Events, and other marketing objects. Note that this should be a single level group.
AMS : Default Currency	Yes	Site	Select from currencies defined in FND_ CURRENCIES	This becomes the default functional currency. All transactions will be converted and stored in this currency. This will be the default currency for Currency LOV.
AMS : Currency Conversion Type	Yes	Site The User level should not be selected.	Corporate, Spot or other conversion type defined in GL	If the functional currency of the organization and the transactional currency of the marketing object are different, this conversion will be used.

Option	Required	Level	Setting	Effect/Limitation
AMS : Source Code Date Format	Yes	Site	Any valid date format	Used in the generation of source codes.
AMS : Source Code Sequence Length	Yes	Site	Maximum field length is 30.	Source Code includes Geography code, Month code, Activity code, and Source code digits. See Source Codes.
AMS : UOM Area	Yes	Site	Depends on UOM Setup	Displays fields that use UOM (for example, area in square feet).
AMS : UOM Length	Yes	Site	Depends on UOM Setup	Displays fields that use UOM (for example, length in feet).
AMS : UOM Time	Yes	Site	Depends on UOM Setup	Displays fields that use UOM (for example, time in minutes).
AMS : Profile Search Set Size	Yes	User	Numeric	Indicates the number of rows displayed in selection windows.
AMS : Upgrade Complete	Optional	Site	Yes/No	Set this profile to No if the upgrade has run once already.

Option	Required	Level	Setting	Effect/Limitation
AMS : Validation	Optional	User	0-100	This profile option affects the validation severity at the database level. A value of 100 (Maximum value of 100) would cause the APIs to validate the passed data very stringently.
OS : Minimum search string length	Optional	Site or User	User Defined	The default setting is 0. This profile determines the number of characters that must be entered before performing a search.
OS : Search Lead Wildcard	Optional	Any	Yes/No	If set to Yes, the wildcard (%) will be allowed as the first character in a search string. If set to No, and the wildcard is entered as the first character, the system will give the user an error message.

Option	Required	Level	Setting	Effect/Limitation
AMS : Budget Adjustment Grace Period in Days	Yes	User	User/Org determined number of days	When automatic reconciliation of Budgets is performed, this grace period is checked. If the marketing object is older than the ending date plus the grace period, any remaining funds associated with the marketing object are returned to the Budgets they were drawn from. This also sets the number of days after the completion of a campaign for the concurrent manager to delete the target group entries from the AMS_LIST_ENTRIES table default is 30 days.

Option	Required	Level	Setting	Effect/Limitation
JTF : Home Page File Name	Optional	Site or Application	User Defined.	Enter a file name of the jsp file (for example, jtfhomepage.jsp). If no value is supplied, a generic information page is displayed. If a file is supplied, it will be displayed on the home page.

Creating Custom Setups

Custom setups dictate how an organization will use marketing objects. They enable an organization to use marketing objects to suit the organization's needs through customized, object-specific side navigation menus.

For example, if a company decides to perform event schedules that always use e-mail as the delivery mechanism, a custom setup for the marketing object "Event Schedule" can be created. This custom setup would have the following attributes:

- Custom Setup Name: Exhibition - Email
- Associated with: Event Schedule
- Activity Type: Exhibition
- Activity: Email

You can create custom setups for the following marketing objects:

- Budget
- Deliverable
- Event
- Event Schedule
- Offer

- One-Off Event
- Product

Custom setup types affect all objects of that type within the application. The setup is restricted to newly created objects of that type.

For example, if a One-Off Event is associated with an Event but the One-Off event side navigation menu item is disabled on the custom setup, the One-Off Event item for currently existing objects will not be visible to users. If this item is enabled again, then the associated Event will become available.

Custom Setup Functionality Overview

Custom setups control the following:

- Side Navigation Menu: The vertical menu which appears on the left-hand side of the page once an object is created. The side panel menu does not appear until you create a new object.
- Menu Items: These are the smallest components on the Side Navigation Menu. Menu items are the functional areas within the application where data can be created or where objects are viewed. Some of the menu items have functional implications, others are used for information purposes only.
- Component Groups: Each of the menu items are logically grouped into various sections based on functionality. Component Groups include Planning, Execution, Tracking, Collaboration and Approval. Each Component Group comprises a logical collection of menu items.
- Seeded Menu Items: Used to create Custom Setups. The menu items are:
    - Main
    - Message
    - Segment
    - Geography
    - Products
    - Deliverable
    - Budget
    - Team
    - Contact Point

- Event Schedule
- Offers
- Tasks
- Publishable Notes
- Partners
- Cost and Revenues
- Campaign
- Metrics
- Attachments
- Theme Approval
- Budget Approval
- Market Eligibility
- Products
- Allocation
- Checkbook

Creating a Custom Setup

When creating a custom setup you will associate the custom setup with a marketing object.

Navigation: Administration > Marketing > General > Custom Setup.

Notes

- Depending on the marketing object selected, additional fields such as Activity Type and Activity may appear. This indicates that the Custom Setup is valid for the specific combination.
  - The selection of Activity Type and Activity determines the available Component Groups and Menu Items. For example, Direct Marketing - Email has a different set of Component Groups and Menu Items as compared to Direct Marketing – Direct Mail.
  - The available combinations of Activity Type and Activity in the Create Custom

Setup page depend on the definition of the organization's Activities, Activity Types and Categories. In the case of Deliverables, the combination of Activity Type and Activity is based on the parent and child category. Custom Setups for Campaign Activities depend on the relationship of Activity Type and Activity.

- **Active:** Select it for the Custom Setup to be available for selection during a marketing object create.
- **Allow Essential and Optional Grouping:** Select this check box if this Custom Setup can be used with the Side Navigation Look profile option.

Setting Up Custom Setup Details

After the Custom Setup has been created, you need to configure it:

Notes

- The combination of Menu Items displayed is based on the marketing object, Activity, and Activity Type combination selected when creating the Custom Setup.
- **Component Groups:** Displays by default based on the marketing object, Activity, and Activity type selected for Custom Setup.
- **Display Sequence:** Use this column to control the order of the marketing objects (as they appear in the side navigation menu). For example, if Products appear on the side navigation menu directly below Main, Products should be sequentially numbered directly after Main. Main is not an optional setting and must be included. In this example, If Main has a value of 10, then Product should have the value 11.
- **Available Attributes:** Use this column to indicate if the attributes for this object should be made available.
- **Essential:** To control the display order of a particular marketing object, place a check in the Essential check box (be sure to select the Essential check box that aligns with the correct marketing object). Anything not checked in the "Essential" column is considered "Optional" and is listed in alphabetical order.
- **Essential Display Sequence:** Display sequence is a numeric setting used to order marketing objects in side navigation menus. If the Essential check box is selected, numeric values provided enable the "Essential" marketing objects to be ordered appropriately. The Display Sequence column is used to determine the order when " Business Process View" profile value is selected.
- **Show in Reports:** Select this check box to enable attributes to be displayed in the portals.

Important: To create custom setups for Campaigns and Activities, you need to create templates. For more information, see Creating Campaign Templates, page 6-15.

Running Concurrent Programs for Common Components

Run the following concurrent programs when implementing core components for Oracle Marketing.

Concurrent Programs for Common Components

Concurrent Manager	Required	Responsibility	Description
AMS Group Access Refresh	Yes	Oracle Marketing Administrator	Updates denormalized tables with group information. Should be run on a periodic basis according the organization's Business Rules. Changes made to the resource groups will not take effect in the application's security until this program is run.
AMS Team Access Refresh	Yes	Oracle Marketing Administrator	Updates denormalized tables with team information. Should be run on a periodic basis according to the organization's Business Rules. Teams added to marketing objects will not gain access to the marketing objects until program is run.
AMS: Portal Cache Daemon	Yes	Oracle Marketing Administrator	Populates the Marketing subtab on the Home tab.

Concurrent Manager	Required	Responsibility	Description
Load Geographic Hierarchies	Yes	CRM Administrator	This program must be run each time that the geographies are changed.
AMS Load Inventory Categories	Yes	Inventory	Loads categories from the MTL schema to the AMS schema denormalized tables. This program should be run if and when a new category is created in Inventory.

Implementing Marketing Users

Oracle Marketing does not ship with seeded users. It does, however, ship with seeded responsibilities. Based on your business requirements, create users (that contain a collection of responsibilities) to perform certain functions within the application.

The following table lists user types (and their associated collection of responsibilities) that are relevant for an implementation.

Oracle Marketing Users

User Type	Responsibilities	Marketing Functionality
Marketing Super User	Oracle Marketing Super User	This user has the ability to create campaigns, events, and programs. This user can perform most marketing activities, planning, and budgeting by accessing the Dashboard links available on the Navigator page. In addition to having access to some basic tabs, this user also has the ability to administer marketing activities. This user will create Rules for approvals but will not have approval functionality.
List Manager	Audience Workbench Super User	This user administers data sources and configures corresponding customer profile attributes that are used by marketers to create lists.
List User	Audience Workbench User	Uses the Audience Workbench to create and manage lists.
Marketing Administrator	Oracle Marketing Administrator Audience Workbench Super User Oracle Marketing Super User Oracle Marketing System Administrator Oracle Fulfillment Super User Oracle Advanced Outbound Administrator	This user is the overall marketing administrator. This user creates metrics and metric templates, activity templates, custom setups, marketing mediums, fulfillment, locking, fatigue, and mandatory rules, user statuses, data sources, targets, etc.

User Type	Responsibilities	Marketing Functionality
Implementation Super User	System Administrator Audience Workbench Super User Oracle Marketing Super User System Administrator CRM Administrator Inventory Administrator Oracle Content Manager General Ledger Super User HRMS Manager Workflow User Web Applications Oracle Receivables Oracle Payable Advanced Pricing Receivables Manager 1-1 fulfillment Administrator.	This user is the overall implementation user to perform all setup, implementation, and administrative tasks. This user has all administrative and implementation privileges including: user creation, profile settings, application defaults, etc.

Implementing Marketing Responsibilities

As an Administrator you can define custom responsibilities specific to the marketing user role at individual sites. Oracle Marketing defines certain seeded responsibilities that can help you in assigning roles. While the responsibilities mentioned in the table below are seeded, the user types are only representative; you can assign responsibilities to the user types, keeping in mind the best practices followed by your organization.

The following table lists the seeded user types for marketing responsibilities.

Seeded Marketing Responsibilities

Responsibility	User Types	Marketing Functionality

Marketing User	Marketer Marketing Manager	This user has access to all the campaign activities without the administrative access. The user can access campaigns from the Campaign Dashboard. This user can create and setup Programs, Campaigns, Campaign Activities, and Events, and also execute Campaign Activities. As a Marketing Manager the user can plan Marketing Programs, Campaigns, request and/or assign budgets for different marketing activities, review Campaign Performances and forecast.
Marketing Administrator	Marketing Administrator	This user has all the privileges granted to the Marketing User over and above the administration access. The Administrator can access the Campaign activities from the Campaign Dashboard link available from the shortcuts. As an Administrator, this user can perform all Administration and Setup activities, and also all the functions available to the Marketer and Marketing Manager.

Setting up Tasks

Setting up Tasks is optional for an Oracle Marketing implementation. This is completed using the Task Manager. It provides a mechanism for your application to respond to customer needs in a timely manner. For more information on setting up Tasks, see Setting Up Oracle CRM Application Foundation, page 2-2.

Setting Up Calendar

The Calendar is a generic calendar available to all marketing users. Different users can have different views of the calendar. However, the users cannot personalize the contents of the calendar at a user level. The calendar displays marketing objects based on statuses and time range. Procedures need to be performed to centrally set up what objects are shown in the calendar.

Marketing objects supported by the Marketing Calendar:

- Campaign Activities
- Event Schedules
- One-Off Events
- Offers

Assigning Usage to Resource Group

Before users can view the Marketing Calendar, their group must be assigned the CRM Foundation Calendar Items Group Usage. Only users on groups with "Calendar Item" usage will be able to view marketing objects. For more information, see the *Oracle Marketing User Guide.*

Navigation: Administration > Resources > Groups Summary

Notes

- **Group Name:** Name of the group by which Calendar usage privileges are requested.
- **Start Date:** Start date for which the group will be able to access the Marketing Calendar.
- **Usage:** To enable the Calendar functionality, select CRM Foundation Calendar Items from the drop-down menu.

Selecting Calendar Display Parameters

The Marketing Administrator must decide on the parameters that will ultimately be displayed in the Marketing Calendar. The Administrator has 2 options:

- Criteria: Displays marketing objects based on a criteria for which they qualify. For example, an Event Schedule may have a criteria of Status "new" and Date "January 1, 2003 - March 1, 2003".
- Object: Displays marketing objects specified. The Marketing Calendar supports Campaign Activity, Event Schedule, One-off Events, and Offers.

Navigation: Administration > Marketing > General > Calendar Criteria

Notes

- **Object:** Marketing object that will be displayed on the Calendar.

- **Custom Setup:** Select a custom setup for the marketing object selected.
- **Start Date:** Start date by which the marketing object selected will begin appearing on the Calendar.
- **End Date:** End date for which the marketing object selected will stop appearing on the Calendar.
- **Priority:** Priority level by which the marketing object will appear in the Calendar.
- **Status:** Marketing object status. For example, if the marketing object selected for display is "Campaign Activity", the status chosen may be Active Schedules. In this case, only Active campaign activities will appear on the Marketing Calendar.

Running Concurrent Program for Calendar

Before the new object or criteria will display on the Marketing Calendar, run the concurrent program **AMS : Interface Marketing Objects to Calendar.** This program is a workflow background process and will update the Calendar as needed.

Configuring User Profiles

Before users can view the Marketing Calendar they must specify in their user profile what marketing objects they want to view. Further, users can personalize the Calendar by saving preferences based on their needs.

To configure user profiles for Calendar preferences, use the Profile icon and set the Display Items attribute to Yes.

> **Note:** The Calendar available on the Campaign Dashboard is only to manage the appointments and tasks. The marketing objects are not displayed on this calendar. The marketing objects are displayed in the calendar available in the Classic Marketing Application. You can see the calendar if you are logged in as the Oracle Marketing Super User.

4

Implementing and Administering Audience

This chapter covers the following topics:

- Audience Overview
- Local and Seed Data Sources
- Remote Data Sources for Separate Warehouses
- Creating and Refreshing Data Source in the Audience Administration Dashboard
- Creating Data Sources in the Audience Administration Dashboard
- Refreshing Data Source
- Creating Query Templates
- Creating and Managing Deduplication Rules
- Creating and Managing Fatigue Rules
- Suppression Lists
- Implementing Contact Preferences
- Administering List Imports
- Setting Up Discoverer for Lists
- Troubleshooting
- Running a Script to Setup Schema in a Remote Database

Audience Overview

As an Audience Administrator, you need to perform administrative activities to support list management, create data sources and query templates for list generation.

Once you log on to the Oracle Marketing Application choose the Audience Administrator responsibility and click the Audience Administration Dashboard, where you can perform most of the Audience administration activities. But before that you must perform the following implementation procedures:

- Implementing Audience Users, page 4-2
- Setting Profiles for Lists, page 4-3
- List Concurrent Programs, page 4-6
- Verifying Lookups, page 4-8
- Implementing List Import, page 4-12

Implementing Audience Users

There are two seeded responsibilities for the Audience Workbench: Audience User and Audience Administrator. Because menus, navigation and login flows depend on the responsibility of the logged in user, you will assign one or both of the following to your users:

Audience User Responsibility

Users with this responsibility typically:

- Use the Audience Dashboard as their home page
- Establish and manage the internal list selection process for marketing departments
- Manage lists from affiliates and vendors
- Develop and manage processes for list data quality
- Ensure data enrichment and list data integrity

> **Note:** If an Audience user updates a sales campaign in the Audience Dashboard using the Advanced option and if a Sales user tries to update this campaign in ASN, the data in the Advanced option will be lost. The Audience user should be aware of this implication. This is specific to sales campaigns alone.

Audience Administrator Responsibility

Users with this responsibility typically:

- Perform administrative activities to support list management
- Create and maintain data sources used by the end user to create lists
- Configure query templates
- Maintain suppression lists

Note: To remove the quick link to the Campaign Dashboard you must exclude the specific function `AMS_WB_CAMP_DASHBOARD` (for e.g., from Audience User/Audience Administrator responsibility).

Setting Profiles for Lists

Set the following profiles for lists. If using Oracle Discoverer for list generation, additional profiles are required.

AMS List Profiles

Profile Name	Required	Level	Setting	Effect/Limitation
AMS: Enable List Recalculation and Preview	Optional	Site	User Defined	If set to "No", users will not be able to recalculate or preview the entries in a list or target group. If set to "Yes", users can recalculate the target audience size and preview list entries after modifying list selection conditions. This helps in estimating and arriving at an optimal list size before actually generating the list. The default value is "No". See The Recalculation Profile Option, page 4-5 for more information.

Profile Name	Required	Level	Setting	Effect/Limitation
AMS: Orders Look Back Period for Query Template Processing (Days)	Optional	Site Responsibility Application User	Yes/No	This profile is valid only for the seeded orders-based query template, for performance problems related to large amounts of Order History Data. It is used during Cross-sell/up-sell based on orders - B2B. If set to Yes, then the user can fetch orders for a specified time period in days. The default value is 730 days. See Creating Query Templates, page 4-27 for more information.

The Recalculation Profile Option

The site level profile AMS: Enable List Recalculation and Preview allows businesses to decide if they want to implement the recalculation or preview entries function or not for lists created using Natural Language Query Builder (NLQB) templates. This profile option can take one of two values - Yes or No. The default value for this profile is set to No.

When the Profile is Yes

When the profile value is set to Yes, the Recalculation Table Status field is displayed in the NLQB template definition page. The Recalculation Table Status will be:

- **Draft:** when the recalculation table is not available.
- **In Progress:** when you click the Apply button in the NLQB template definition page. This implies that the concurrent request is submitted and recalculation table

generation is in process.

- **Available:** when the recalculation table generates successfully.
- **Failed:** when the recalculation table generation fails. Click the **Apply** button again to restart the recalculation table generation process.

When marketers use this layout to create lists in the *Standard* list creation method, the **Recalculate** and the **Preview Entries** functions are available. Projected Running Total and Change columns will be displayed. If a marketer completes all the target selections and clicks **Recalculate** or **Preview Entries** when the table is not yet generated, the system will display error messages. However, when the table is available, the system will perform the recalculation and display the entries.

The Projected Running Total and Change columns will not be displayed in the *Advanced* list creation method, and users cannot use the recalculate feature in this mode.

When the Profile Value is "No"

When the profile value is set to "No", the Recalculation Table Status field is not displayed in the NLQB template definition page. When you click **Apply** in the NLQB template definition page, no concurrent request is launched. If any associated recalculation table exists, it is dropped. The **Recalculate** and **Preview Entries** functions are not available to the marketers when they create lists. Projected Running Total and Change columns will not be displayed when marketers create lists using either the *Standard* or the *Advanced* method.

Refer to *Oracle Marketing User Guide* for information on list creation methods.

Running List Concurrent Programs

Run the following concurrent programs as needed.

List Concurrent Programs

Concurrent Program	Required	Description
Workflow Agent Listener	Yes	List generation is invoked through business events. These business events need the background agent Workflow Agent Listener to execute them. This background agent picks up and executes all the scheduled list generation processes. The WS_Deferred parameter must be selected for the Workflow Agent Listener business event.
AMS Migrate Word Replacement Rules for Remote List Processing	Yes	This program migrates word replacement rules from a local to remote instance. This is a scheduled program.
AMS Migrate Remote List	Yes	This program migrates a list generated in a remote instance to a local instance. This is a scheduled program and can be executed for a particular list or for all lists.
AMS Generate Materialized View for Template	Yes	This program executes when a query template is created (when the Finish button is selected on the query template screen.) It creates the materialized view for the template.
AMS Re-Generate Materialized View for All Template	No	This program refreshes the materialized views for all templates.

Concurrent Program	Required	Description
AMS Refresh Metrics	Yes	This request set populates the List Effectiveness bin and the Trend graph on the Audience Dashboard.

Verifying Lookups

The following lookups populate the list of values for list functionality. If implementing Oracle Discoverer for lists, you will need to verify additional lookups. For more information see Integrating Oracle Marketing and Oracle Discoverer, page 2-21.

List Lookups

Key	Type	Seeded Values	Meanings
AMS_LIST_ ACT_TYPE	User	List Import List Workbook Segment SQL	Target group selection type.
AMS_LIST_ DEDUP_ TYPE	User	Import Persons Import Organizations	Type of Deduplication Rules to be applied.
AMS_LIST_GENERA TION_ TYPE	System	Full Refresh Append New Records Update Attributes Only	Full refresh of all the entries. New entries meeting the criteria added. Only the attributes of the entries updated.
AMS_LIST_ ROW_ SELECT_ TYPE	System	Nth Record Random Standard	How to select rows during list generation. Standard is top down selection.

Key	Type	Seeded Values	Meanings
AMS_LIST_ SEGMENT_ STATUS	User	Archived Available Cancelled Draft Expired	Archived Available Cancelled Draft Expired
AMS_LIST_ SEGMENT_ TYPE	System	Workbook SQL	Two types of segments supported. Based on a Discoverer workbook or an SQL statement.
AMS_LIST_ SELECTION_ ACTION	System	Include Intersect Exclude	How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list.
AMS_LIST_ SELECT_TYPE	System	Segment Workbook Import List List SQL	Components of list used in list selection.
AMS_LIST_SEGMEN T_ STATUS	User	Archived Available Cancelled Draft Expired	Possible list segment statuses.

Key	Type	Seeded Values	Meanings
AMS_LIST_STATUS	System	Archived Available Cancelled Draft Executed Executing Failed Generating Locked Migrating New Pending Reserved Delete Purged	List Statuses
AMS_CHART_TYPE	System	Pie Bar Column	Type of chart available
AMS_QUERY_TEMPLATE_TYPE	System	Standard Parametrized SQL	Two types of templates are supported: Standard and Parameterized SQL. Standard templates are created using the NLQ (natural language query builder) interface.

Key	Type	Seeded Values	Meanings
AMS_LIST_ TYPE	System	Manual List Standard List Suppression List Target Group	List of possible list types. Note where these appear in the program.
AMS_AUDIENCE_METRIC_TYPES	System	Booked Order Amount Booked Order Count Invoiced Order Amount Leads Opportunities Responses	Metrics that are tracked for Lists used in target groups.
AMS_EXPN_BUILDER_OPERATORS	System	Average Maximum Minimum Count Sum Sysdate	Valid operators for expression builder.
AMS_DATA_SOURCE_LOCATION_TYPE	System	Local Remote	Data sources are based on tables/views that are located in the current database (local instance) or views/tables located in a remote database (remote instance). The remote instance is accessed using a database link.
AMS_DATASOURCE_TYPE	System	Parent Child	Types of data sources available.

Key	Type	Seeded Values	Meanings
AMS_DATASOURCE_CATEGORY	System	Organization Contacts Persons	Category of data source.
AMS_SPLIT_MODE	System	Split by Attribute Split by Percentage Split by Number	List splitting methods

Implementing List Import

List Import is an Oracle Marketing feature that facilitates importing lists of prospects and their related information from outside sources.

The following types of lists can be imported:

- Rented lists
- Purchased mailing lists
- Mailing lists from merged or acquired organizations
- Mailing lists provided by internal or external sales people

Using the List Import feature lists may be added directly to TCA tables. When importing from a purchased list, data is stored in the TCA schema. However, when importing from a rented list data is not stored in the TCA schema.

List Import Table Overview

The Oracle Marketing list import functionality supports many different business requirements. For example, event registration can be automatically executed from list import.

When a list import is performed, B2B or B2C data is imported into the Marketing and TCA tables. When doing so, you can import directly into TCA or you can choose to preview it first.

Marketing import tables:

- AMS_IMP_LIST_HEADERS_ALL
- AMS_IMP_SOURCE_LINES

- AMS_PARTY_SOURCES

TCA import tables:

- HZ_PARTIES
- HZ_LOCATIONS
- HZ_PARTY_SITES
- HZ_CONTACT_POINTS
- HZ_ORG_CONTACTS

Creating the Bin Directory

Use this procedure to create a location for the SQL loader control file. This step enables you to import data from a file located on the server.

Prerequisites: SQL Loader is installed

Notes

- Launch a DOS prompt and create the Bin Directory under PRODUCT TOP ($AMS_TOP) for the SQL Loader control file. This directory must have read, write and execute privileges.

Setting System Profiles

Set the following list import profile options:

List Import Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : IMPORT CONTROL FILE PATH	Yes	Site	Control File Location	Enter the path for the bin directory: ($AMS_TOP/bin/) This path is relative to the mid-tier server that the SQL loader control file is written to. Improper setup will cause the server side import to fail.
AMS : IMPORT DATA FILE PATH	Yes	Site	Data File Location	Enter the path for the data file location: ($AMS_TOP/bin/). This path is relative to the mid-tier server and indicates the location of the import data file. For the data file you may also set a different path to where the data is kept. Improper setup will cause the server side import to fail.

Option	Required	Level	Setting	Effect/Limitation
AMS : HZ DEDUPE RULE	Optional	Site	Yes/No	Indicates whether de-duplication rules are used during the TCA import process. The system may create duplicate records if this profile is not set to Yes.
AMS : Import Client File Size	Yes	Site	Numeric value	Size of file in bytes. Based on this profile, the import program decides whether to use the concurrent manager to upload the file. Default value is 1000000. For Oracle Marketing List Import functionality, this value sets the file size limit in terms of bytes that can be uploaded by client.
AMS : Default Data Source	Yes	Site	Data Source name	Data source name that is defaulted in the list/target group creation screens.

Option	Required	Level	Setting	Effect/Limitation
HZ : Key Word Count	Optional	Site	Number of words	This number determines how many words in the customer name are used to generate the keys
HZ : Address Key Length	Optional	Site	Length of the Address	This determines the length of Address key
HZ : Postal Code Key Length	Optional	Site	Length of the Postal Code	This determines the length of Postal Code key

Verifying Lookups for List Import

Use the following table for Lookups, types, values, and meanings.

List Lookups

Key	Type	Values	Meanings

AMS_ IMPORT_ STATUS	System	New Staged Scheduled Completed Purged Cancelled Error Duplicate Incompdump Incompdumperr Incomperr	New Import Entries are imported and available for viewing Import is setup and ready to be completed at the scheduled time Import completed Imported entries have been purged from the Marketing Import Table The List Import has been cancelled and may not be reactivated An error occurred during List Import Duplicate record found Incomplete-Duplicate found Incomplete-Duplicate -Error found Incomplete-Error found
AMS_ IMPORT_ TYPE	System	B2B Customer B2C Customer Event Lead	Organizations, Contacts, Address Persons, Addresses Event Registration Leads

Note: For Event Registrations, you can put the Default Registration Method in the import file and then map the default registration method to any value. If you do not map any value, then the Registration method that will be imported will be CALL CENTER.

Running NFS Mount

If the concurrent manager server is different from the server where your data is located (and you want to import data from the server) - you must run NFS Mount. This ensures that your data file directory is mounted to the concurrent manager server.

Local and Seed Data Sources

Understanding Data Sources

In Oracle marketing there are a set of pre-defined data sources that help the list creating process. These data sources are called seeded data sources. Local data sources are created by marketing users. They can store the data in the application and use them to manage the audience for their products.

As the audience administrator, you are responsible for setting up data sources and their respective attributes. Data sources are a fundamental component of the list management process. In short, they determine the type of data retrieved for lists.

Data sources determine:

- Attributes available to the end user during list creation
- TCA information mapping (when remote lists are migrated to a local instance)
- Data available in list entry
- Attributes available for splitting and charting
- Deduplication rules

Data sources map columns from a source table (or view) to the marketing list entries table AMS_LIST_ENTRIES. Once mapped, data from the table or view can be used for lists.

Data sources can be either child or parent.

The parent data source determines the type of list that will be created.

Usually, the attributes included in the parent data source are mapped to the list entries. Each parent data source also includes seeded templates and de-duplication rules.

A child data source provides additional information about the parent. A parent can have an unlimited number of child data sources associated.

Parent and Child Data Source Example

Scenario

Amy is the list administrator for Vision Computers. Her marketing team wants the ability to generate a list for cross sell purposes. The end goal is to generate a list of customers who have recently purchased a Vision Desktop computer.

Solution

Based on the business requirements given to her, Amy must create the appropriate data sources. As such, she will create a parent data source "Persons" and a child data source "Order Detail."

Parent Data Source: Persons

- Table: AMS_PERSON_DETAILS_V
- Unique Identifier: PARTY_ID
- Information of interest: Person First Name, Person Last Name, Email Addresses, Language
- Note: This data source provides details about the person/customer who has recently purchased a Vision Desktop computer

Child Data Source: Order Detail

- Table: AMS_DS_ORDERS_V
- Unique Identifier: PARTY_ID
- Information of interest: Booked date, Creation Date, Unit Selling Price, Order ID
- Note: This data source provides transactional information about the person (and customer) who has placed the order

Creating Custom Data Sources

If the seeded parent data sources do not meet your business requirements you can create your own custom data source. When doing so, you can point to the Oracle TCA. You can also use data that resides in a remote location. For more information about creating data sources (custom or remote), see Creating Data Sources in the Audience Administration Dashboard, page 4-24.

Adding Related Data Sources

Related Data Sources help define the relationship between the corresponding data source and its related data source. For a parent data source, it displays the relationship with its child data sources. For a child data source it displays the relationship with the parent data source.

The Related Data Sources mid tab is displayed for all data sources (parent or child). If a relationship is defined in the parent data source (between itself and a child data source), then on navigating to the child data source, you see the relationship between the child and the parent. This implies that creating a relationship in one data source, displays the inverse relationship in the "Related Data Sources" mid tab of the other data source.

For example, if the Parent Data Source is Organization Contacts and the child data source is Locations, then if a relationship is created between the Organization Contacts and Locations in Organization Contacts, then the Related Data Sources mid-tab of Locations automatically displays the relationship of Locations to Organization Contacts.

The following related data sources are seeded:

- Person Profile
- Education
- Employment History
- Organization Profile
- Account Profile
- Interactions
- Leads
- Order Detail
- Install Base
- Sales Access
- Data mining Aggregates
- Profitability
- System Reference
- Data Mining Score

Seeded Data Source Reference

The following parent data sources are seeded:

- Person: Represents Business to Consumer (B2C) customer attributes such as first name, last name, marital status, household income, etc.
- Organization Contacts: Represents Business to Business (B2B) attributes such as first name, last name, job title, work e-mail address, etc.
- Organization: Represents organization attributes such as company name, business type, revenue, etc.

Configuring Data Source Attributes

When creating or updating data sources you will define the attributes for it. Using the data source attribute pages, you can define data source attributes for list management as well as data mining. The following table gives the descriptions for data source attributes.

Data Sources Attributes

Attribute Name	Description
Attribute	The attributes of the table or view that the data source references. The values are displayed as they exist in the table or view.
Display Name	Allows you to change the display name for the attributes pulled from the table or view. The values entered in this column are displayed to the end user during the list creation process.
Map to List Entries	Use the Search and Select flashlight to pick from the list of values.
Display in List Entries	Use this checkbox to indicate that you want this data source to display data (by default) in the List Entries page for the end user. If this checkbox is left unchecked, the data source will not display by default and the end user will have to explicitly select it through the personalization option.
Use for Split	The end user has the option to split a list by attribute. Therefore, as the administrator, when defining data source attributes, you must specify that it is available for splitting. If you want to use for splitting you must map the attribute.
Define LOV Chart	Selecting this icon enables you to define LOV and chart ranges for this data source. If you are charting an attribute, you must also map to list entries.

Attribute Name	Description
LOV	If a list of values are defined for this attribute, then you will see a check in this column.
Chart	If a chart is defined for this attribute, then you will see a check in this column.
Enabled	Place a check in this checkbox to enable the attribute for the data source. If this checkbox is left unchecked, this attribute will not be available for use in the list template creation process.

Defining the List of Values and Charts for Data Sources

When defining data source attributes, you can choose to define a list of values that correspond to it. This list of values can also be used to drive the chart ranges. This reduces the chance of error because you are limiting the data the user can select.

To define the LOV and chart attribute, login as a user that has the Audience Administrator responsibility and navigate to the Administration Dashboard.

Notes

- Locate the Data Source you want to configure and in the Attributes mid-tab, select the Define, LOV chart icon.
- In the Add List of Values Using drop-down, select one of the following:
  - **Manual Entries:** This option enables you to manually define the LOV for the attribute. If using this option, select "Add Another Row" and enter a value code and display name.
  - **Value code:** Exact value (as it appears in the database). For example, the value code for country could be CAN for Canada.
  - **Display name:** Text box that allows you to change the code name to a more user-friendly display name. For example, the display name for CAN could be Canada.
  - **Another List of Values:** Allows you to pick a specific list of values that have previously been defined for similar attribute. This option allows you to re-use the LOV that has previously been defined. This will save you time. Using this option you essential share the LOV with other attribute, therefore changing the definition of the LOV will affects all attributes sharing this LOV.

- **List of Value Name:** Specify the values that you'd like this attribute to have. For example, if you'd like the attribute "COUNTRY" to have "United States" and " Canada" as the list of value options, select them here.

- **Custom SQL:** Using this option, you can define the list of values using data retrieved with SQL logic. Use the Custom SQL box to enter an SQL statement.

  Note: If you define an SQL query for an LOV, ensure that it does not return a null value for the columns you selected.

Linking a Parent to a Child Data Source

To establish a parent and child data source relationship, first create the parent and child data sources. On the audience Administration Dashboard, select the parent data source and navigate to the Related Data Source mid-tab.

Notes

- **Related Data Sources:** Search and select the child data source.

- **Related Data Sources Column:** Search and select the unique identifier for the child data source. This is the child data source attribute that would define the join condition between the child and the parent. If this column is left blank the child's unique identifier will be used as the join condition.

- **Primary Data Source Column:** Search and select the unique identifier for the child and the parent. By selecting the same unique identifier, the child becomes associated to the parent. If this column is left blank the parent's unique identifier will be used as the join condition.

- If the parent data source is selected first (and the child is related after) the primary data source columns refers to the parent and the related data source column refers to the child.

- To link a child to a parent data source, select the child data source first (and parent is related after) the primary data source columns refers the child and the related data source column refers to the parent.

Remote Data Sources for Separate Warehouses

Data sources can be local or remote. Remote data sources can be setup and used for list generation. Remote data sources point to objects residing in a remote instance. For example, an external data warehouse system. To define a remote data source, you will point to a remote object using a database link (DB link).

A list created by the end user using a remote data source will reside in the remote instance until it is migrated.

Optionally, once you have established the DB link, you can migrate a single list (or all remote lists) to your local instance. If migrating, remote lists go through a migration process. For target group generation, data validation and TCA inserts are performed. Lists are generated through a package available on the remote instance.

Use the following procedures to setup remote data sources:

- Creating the Database Link in the Local Instance, page 4-24
- Running a Script to Setup Schema in a Remote Database, page 4-47

Creating the Database Link in the Local Instance

Use the following guidelines when creating the DB link in the local instance:

- DBLINK_FROM_LOCAL_TO_REMOTE: Database link name
- Username: Username used to connect to remote instance
- Password: Password used to connect to remote instance
- REMOTE_DATABASE_NAME: Name of remote instance

To create the DB link in the local instance:

```
CREATE PUBLIC DATABASE LINK DBLINK_FROM_LOCAL_TO_REMOTE
CONNECT TO USERNAME IDENTIFIED BY PASSWORD
USING REMOTE_DATABASE_NAME;
```

Creating and Refreshing Data Source in the Audience Administration Dashboard

You can create a data source using the Audience Administration Dashboard. However, if any changes are made to the underlying data source table or view, the data source has to be refreshed to display these changes in the user interface.

For details about how to create a data source see Creating Data Sources in the Audience Administration Dashboard.Creating Data Sources in the Audience Administration Dashboard, page 4-24.

For details about how to refresh a data source see Refreshing Data Source, page 4-26.

Creating Data Sources in the Audience Administration Dashboard

You can create a data source customized to your needs. This data source might be local or remote. For remote data sources you need to run a script to setup the schema in the remote data source, and create the remote database link in the local instance.

To create a data source, log in as an Audience Administrator and navigate to the Audience Administration Dashboard.

Navigation: Audience Administration Dashboard > Create Data Source

Notes

- **Code:** This code is used as a reference for the data source when creating Discoverer Workbooks. For more information about creating Discoverer Workbooks, see Integrating Oracle Marketing and Oracle Discoverer, page 2-21.

- **Type:** Based on requirements, choose either parent or child.

- **Category:** Selecting a category enables you to organize the data source by type. Category selection is mandatory when creating parent data sources and optional when creating child data sources.

  The following categories are seeded:

- Organization Contacts

- Persons

- Organizations

- **TCA Data Source:** Select this check box if the Data Source you create belongs to a TCA. Ensure that the PARTY_ID column contains a valid TCA party.

- **Table or View Information region:**

  - **Location:** Choose Remote if you want to create a remote Data Source.

  - **Database Link:** Enter the database link information. This is the link created in Creating the Database Link in the Local Instance, page 4-24.

- **Table or View Name:** Select the appropriate table or view that the data source is using. By selecting a view (given it has been created) you are able to narrow down the amount of data that the end user is able to retrieve when creating lists.

- **Unique Identifier:** Enables you to set a default join condition between a parent and child data source. Specifying the join condition here enables the child and parent to be *explicitly* joined. Although you can relate the parent and child at a later time (using the Related Data Sources mid-tab), if you know your parent/child relationships up front, you can join them in the data source creation phase.

  Complete the Attributes information for the data source in the Update Data Source page. You can select Data Mining Details from the View Drop-down to customize the following attributes for Data Mining:

- **Auto Binning:** Select this if you want the application to automatically bin the data.

- **Binning Details:** Select this icon if you want to manually bin the data and enter the Number of Buckets to be used for the Manual Binning. You can then enter the bucket number and the value for each of these buckets.

In addition, you can also create manual bins within multiple values by specifying the multiple values (for the same bucket) in multiple lines. For example, to create two buckets with multiple values for an attribute of type VARCHAR, you can specify the following:

Bucket Number	Value
1	A
1	E
1	I
2	B
2	C

- **Map to List Entries:** If generating a list from the data mining results, then map the data source attributes to the corresponding list entries columns within this column.
- **Display in List Entries:** Select this check box to display the columns within the Entries mid-tab for a list.

Refreshing Data Source

Oracle Marketing allows you to create a data source based on either a TCA or Non-TCA schema table or view. Once it is created, the data source does not reflect any modification that is made in the underlying table or view. Users must click the Refresh button to view these modifications and use them in customer selections.

Data Source Refresh Example

Scenario

Amy is the list administrator for Vision Computers. Her marketing team wants the ability to generate a list for the new Quarterly Loyalty Magazine. The list should display the details of customers who have joined the Vision Computers Loyalty Scheme.

Solution

Based on the business requirements given to her, Amy creates a Custom data source

"VC_PERSONS_LOYALTY".

Custom Data Source Name: "VC_PERSONS_LOYALTY"

Table: VC_PERSON_LOYALTY_SCHEME, with the following attributes:

- Person_Loyalty_ID (unique identifier)
- Party_ID
- Loyalty_Scheme_Code

This data source provides details about the customers who have joined the Vision Computers Loyalty Scheme.

The Marketing team realizes they cannot make the appropriate customer selections, as one of the attributes they require is not available in this data source. Therefore, Amy modifies the Table VC_PERSON_LOYALTY_SCHEME to include the following attribute:

- Loyalty_Scheme_Code

To expose the new attribute, Amy navigates to the "VC_PERSONS_LOYALTY" custom data source and clicks on the 'REFRESH' button.

The New Loyalty_Scheme_Sub_Code attribute is now available in the "VC_PERSONS_LOYALTY" custom data source for use by the Marketing team to select the customers.

Creating Query Templates

As the audience administrator, you will create query templates. These templates enable your end users to quickly and easily create lists. When creating a list, your end user has two different list template options to choose from:

- Standard List Template: You can specify conditions using the Natural Language Query (NLQ) template, just as you would naturally think of them. You can define your selection criteria by selecting the operator and the corresponding value for each condition.
- Parameterized SQL List Template: The Parameterized SQL List Template is based on an SQL statement with parameters you provide to your user. Users must enter values from the selection parameters while creating a list.

Understanding Standard Query Templates

The ten commonly used standard query templates that are seeded with the Oracle Marketing application are detailed in the following table.

Seeded Standard Query Templates

Query Template Name	Data Source	Filter Conditions
Cross Sell to Install Base - B2B	Organization Contacts	Current install base products, purchase amounts, firmographics, and contact profile attributes
Cross Sell/Up Sell based on Orders - B2B	Organization Contacts	Purchase history, firmographics, and contact profile attributes
Customer Acquisition - B2B	Organization Contacts	Firmographics and contact profile attributes
Customer Retention based on Orders - B2B	Organization Contacts	Purchase history, firmographics, and contact profile attributes
Lead Maturation - B2B	Organization Contacts	Lead information, firmographics, and contact profile attributes
Interaction Follow Up - B2B	Organization Contacts	Interaction history, firmographics, and contact profile attributes
Cross/Sell Up Sell based on Orders - B2C	Persons	Purchase history, demographics, and person profile attributes
Customer Acquisition - B2C	Persons	Demographics and person profile attributes
Customer Retention based on Orders - B2C	Persons	Purchase history, demographics, and person profile attributes
Interaction Follow Up - B2C	Persons	Interaction history, demographics, and person profile attributes

Creating Custom Query Templates

Within the Audience Administration interface, you can create additional user-defined query templates to meet your business requirements. These query templates can be based on the out-of-box data sources (Organization Contacts, Persons, Organizations) or any user-defined data source (for example, an industry-specific data mart). You can create these templates using either the Standard or Parameterized SQL template options.

To create a user-defined standard query template, login as a user that has the Audience Administrator responsibility and navigate to the Audience Administration Dashboard.

Prerequisites: Data Sources are created

Notes

- **Query Template Name:** Enter a logical name for the template. For example, cross sell list template.
- **Query Template Type:** Choose Standard.
- **Data Source Name:** Select the data source that will be used for this template. The data source determines the type of data retrieved.
- **Purpose:** When the end users are creating lists, they are required to select a purpose. After solacing the purpose, templates (of that purpose type only) are displayed to them. Therefore, as the administrator, you must carefully organize your template purposes. Purpose types are seeded, however, you can extend the purpose type lookup.

Seeded Purpose Types:

- Cross Sell: Used for creating lists for the cross selling purposes.
- Customer Acquisition: Used for creating lists for customer acquisition purposes.
- Customer Retention: Used for creating lists for customer retention purposes.
- General Purpose: Used for creating general lists (not tied to a specific purpose).
- Lead Maturation: Used for creating lead maturation lists
- Up Sell: Used for creating lists for up selling purposes.

Query Template Selections Section Notes

- **Attributes:** Using the search and select icon choose an attribute for the query template. For example, if the list template filters by age or gender, you would select age or gender as an attribute.
- **Attribute Display Name:** Enter a user-friendly display name for the attribute

selected.

- **Available Operators:** Select an operator for the attribute. For example, if filtering by "people who are age 30", then the operator would be **Is**.

- **Value:** Depending on the available operator and default, you will choose an appropriate value mode. The following modes are available:

- **Calculation:** If the data source is being used for "comparison" purposes, use this type of value mode.

- **Constant:** If the data source has a static value, select this value mode. For example, if your query template is filtering for "age is 30" then constant (as a value mode) would be selected. Once constant is selected in the mode drop-down menu, a text box appears. Enter the constant value in this text box. For example, for "age is 30", enter the value 30.

- **Attributes:** If attributes have previously been defined, you can re-use them by selecting this value mode.

- **List of Values:** Selecting this value mode enables you to define a list of values for the data source.

- **Value Display:** Use this text box to change the display value for the end user. For example, if the attribute selected is "default city", the value display could simply be "city".

- **Mandatory:** Select this check box to enforce this particular attribute -- a mandatory selection for a template cannot be deleted by the end user.

Query Template Attributes

You must configure the attributes that you will use to create a query. These attributes are defined when you create a query template. Using the Query Template Selection table, you can define query template attributes for list management as well as data mining. Once you configure the attributes, you can preview the template. The following table lists the descriptions for query template attributes.

Query Template Attributes

Attribute Name	**Description**
Attributes	The attributes that you define for the query template.

Attribute Display Name	The name of the attribute as it is displayed in the table. For example: an attribute Order Detail.Extended Price might have Order Value as the display name.
Available Operators	These are specific operators that you may choose from to add value to the attribute. For example: you can define the operator 'is between' , 'is after' for the order booking date.
Operator Default	Choose the default value of the operator.
Value	List of values.
Value Display	Specific value of the attribute.
Default	If checked, this value is the default.
Mandatory	If checked, this attribute is the default.
In Use	Shows if the attribute is in use already.

Creating Self Joins for Complex Queries

In Oracle Marketing you can create a Self Join for complex queries. A Self Join is a query in which a table is joined to itself. You can use a Self Join to compare the values in a column with other values in the same column of the same table. This way you can get running counts and running totals in the SQL query. You can create a Self Join at the attribute stage.

Creating the Recalculate Table

Within the Audience Dashboard, a marketer can use query templates to create lists. After selecting a query template, the marketer can enter values for the query template conditions and obtain a quick cascading count of these conditions as well as previewing the entries before creating the list. These counts are based on the values (operator, operand) provided by the marketer for the different query template conditions. The numbers for these cascading counts (that is, the Projected Running Total column within the List Selections table) is determined using the table created for the corresponding query template.

The information stored in the table is a snapshot of the data available specifically meeting the conditions of the template at the time of template creation. The tables pre-store the information therefore reducing the need to re-compute the data being queried when the user wants to preview the projected total and entries. Pre-storing the data supports faster viewing of the results.

The table supporting the individual query template is automatically created or updated depending on whether you are creating a new template or updating an existing one. You can also create the tables using a concurrent program.

For seeded query templates (see Seeded Standard Query Templates, page 4-28) you must create the tables supporting the template prior to marketers using these templates to obtain cascading counts. Each query template should be enabled before creating its corresponding table. To create tables supporting each of these templates, simply select the appropriate template(s) and click Apply.

The section below illustrates the process of creating a table for a query template if you choose to use a concurrent program.

Prerequisites:

- Before you run the concurrent program to create the table(s), ensure that all the conditions are defined for the corresponding query template(s) and the template is enabled.
- Ensure that there is sufficient disk space. The space requirement for a table is proportional to the customer and transactional data within the data source and the number of conditions within the query template definition. A large B2C (business to consumer) organization will typically have more customer and transactional data than a B2B (business to business) organization. Hence the table created for B2C implementations will normally require more disk space.
- The conditions for seeded query templates reference data within the Oracle E-Business Suite schema. It is estimated that these query templates will require approximately 35 MB of disk space for each query template. Based on the Oracle E-Business Suite data within your organization, you may require additional disk space.

Notes

Note the template name for the corresponding query template.

- Log in to Oracle Forms and submit a new single request.
- **Find:** AMS Generate Table For Template
- **Template Name:** If you do not enter a template name in this window, then tables for all enabled query templates will be generated (or regenerated).
- Note the Request ID. You can monitor the status of this concurrent request by providing the Request ID within the Find Request window.
- After the table is created successfully, a marketer can use the query template within

the Audience Workbench to determine the cascading counts and preview entries that meet the template conditions.

> **Note:** In case of remote data sources, the recalculation table is created in the remote instance.

LOVs for Attributes

You can define a List Of Values (LOV) for query template attributes from the Audience Administration Dashboard. You must log in as the Audience Administrator and navigate to the Query Templates page. Select a data source to define the LOV.

Navigation: Audience Administration Dashboard > Query Templates > Data Source

Notes

- **Add List of Values using:** The method by which you can add the List of Value. Select 'Another List of Values', 'Custom SQL', or 'Manual Entries' from the drop-down menu.

- **Display Name:** Enter the Display Name of the value. For example - Age.

Defining Charts on Attributes

You can define charts for the query template attributes from the Audience Administration Dashboard. You must log in as the Audience Administrator and navigate to the Query Templates page. Select a data source to define the LOV and click the Define LOV, Chart icon from this page. Click the Continue button

Navigation: Audience Administration Dashboard > Query Templates > Data Source

Notes

- **Default Chart Type:**You can choose a 'Pie', 'Column', or 'Bar' chart to represent the attribute.

Understanding Parameterized Query Templates

In some cases, it might be easier to create templates based on a set of parameters. This may be the case when the SQL statement is very complex or if you are a power user of SQL. In these cases, you can set up a template so that the end user only needs to input values for these parameters to generate the list.

If you set up a template using parameterized SQL, then the end user simply selects the template and the corresponding parameters for the template are displayed. The end user selects the *purpose* and the *list template* in the first step of the Create List process. The mechanism to display either the Standard Template (based on natural language) or the Parameterized SQL Template depends on how you have set up the template. The following steps display the Parameterized SQL template creation process.

1. **Step 1:** As the Administrator, you will create the template based on a pre-selected SQL statement. Once you have set this up, when creating lists, the user will only need to input values for these parameters.

2. **Step 2:** During the create list creation process, because you have setup parameterized SQL templates, this is displayed in the drop-down menu (instead of the standard template).

3. **Step 3:** Because the parameters are pre-defined, the corresponding parameterized SQL template parameters are displayed.

To create a parameterized SQL template, login as a user that has the Audience Administrator responsibility and navigate to the Audience Administration Dashboard.

Notes

- **Query Template Type:** Parameterized SQL.

- **Data Source Name:** Select a Parent Data Source for the template.

- **Purpose:** Select a purpose for the template. For example, if creating a list template for cross selling purposes, choose Cross Sell as the purpose type.

- **SQL Definition Region:** Enter the parameterized SQL condition.

  - **Definition:** Use this field to enter editable text for the SQL Description. The text entered here appears in the end user interface within the Selections section for a list that uses this template.

  - **SQL:** Use this text box to enter a parameterized SQL condition. For example,

    ```
    Select * from Table A
    where A.COLUMN_NAME1 = :Column_Name1
    and A.COLUMN_NAME2 = :Column_Name2"
    ```

  - **Validate SQL:** After entering the custom SQL, use this button to validate the SQL statement. Clicking the button takes you to the standard Validate SQL page. There are three sections within the Validate SQL page:

  - **SQL Statement:** Read only text of the SQL Statement entered in the Custom SQL page

  - **SQL Validation:** Read only text that indicates if there are any errors in constructing the SQL, like SQL syntax, table names, column names within the table, etc.

  - **Index Results:** Read only text that identifies if the SQL condition is based on any non-index attributes

Creating and Managing Deduplication Rules

Deduplication rules check for list duplications, such as duplicate names, email addresses, first names, last names, etc.

Because list creation requires a parent data source to be selected, when creating deduplication rules, you are only able to select one that is associated to a parent data source.

Seeded Deduplication Rules

There are a set of pre-defined or seeded deduplication rules for the data sources Organizations, Organization Contacts, and persons. Deduplication rules for persons are pre-fixed with 'B2C'. You can view the these rules from the Audience Administration Dashboard. Click the Data Source name to view the rules.

The following de-duplication rules are seeded in Oracle Marketring:

- EMAIL-DUPLICATION-RULE
- PHONE-DUPLICATION-RULE
- FAX-DUPLICATION-RULE
- ADDRESS-DUPLICATION-RULE
- B2C- ADDRESS-DUPLICATION-RULE
- B2C- EMAIL-DUPLICATION-RULE
- B2C- FAX-DUPLICATION-RULE
- B2C- PHONE-DUPLICATION-RULE

Setting up Custom Deduplication Rules

To setup custom deduplication rules, login as a user that has the Audience Administrator responsibility.

Notes

- **Attribute Name:** Select the attribute that the deduplication rule is being created for. For example, if creating a rule to eliminate duplicate email addresses, you could choose Contact Email Address.

- **Word Standardization Rule:** Optionally, select a standardization rule for the corresponding attribute. Word standardization allows words that have alias or alternate spellings to be normalize when going through the de-duplication process.

For example Oracle Pkwy means the same thing as Oracle Parkway. Therefore, when using word standardization, the system will recognize it to be a duplicate when it goes through the deduplication process.

You can standardize words using the following criteria:

- Address
- First Name
- Key Modifier
- Last Name
- Organization Name

Creating and Managing Fatigue Rules

Fatigue rules provide your end users with a tool that helps prevent them from over contacting customers. As the administrator, you will setup up fatigue rules that define contact parameters.

Fatigue rules provide the following business benefits:

- Promote Brand Awareness: If promotions are strategically timed, customers are not overexposed, therefore when they are contacted they are likely to be more receptive.
- Support Marketing Strategy decisions: Helps enforce marketing rules dictating customer contact boundaries.
- Maximize Marketing Dollar Effectiveness: If strategically contacting customers, every marketing dollar spent receives (in theory) a better response rate, therefore improving effectivity.
- Improve Collaboration: Enables you to setup enterprise wide rules. For example, Telesales, direct mail, and email (all communication channels having the potential to fatigue the consumer) - by centralizing the rules, you can prevent all channels from over-contacting the consumer.

A fatigue rule defines maximum permissible contacts within a specified time period. For example, "Do not contact customers more than two times per month by any channel." The defined time period adheres to a rolling period.

Rolling Period Example

An e-mail schedule is set to execute on February 13th and Amy is on the target list of customers to be contacted. The fatigue rule specifies, "Do not contact customers more than two times per month by any channel."

On 13th February (when the schedule executes) it determines how many times Amy has been contacted in the last one month.

Contact count for Amy in the last 30 days:

- Email was sent to Amy on Jan. 15 -- one contact was counted.
- Another email was sent to Amy on Jan. 21 -- the count became two.
- As of Feb. 13, Amy had already reached her threshold of "two contacts per month." Therefore, she is *fatigued* and cannot be contacted.

However, if the schedule executed on Feb. 14th, the total number of contacts within the last 30 days would have been 1. The contact on Jan. 15th would have been rolled out from the past 30-day period starting Feb. 14th.

Fatigue rule time periods are defined as follows:

- Week = 7 days
- Month = 30 days
- Quarter = 90 days
- Year = 365 days

Using this type of rule (threshold) you can set an absolute limit on the number of contacts for a given time period.

- If exclusively setting channel-specific limits -- global rules can be null
- For example: do not contact any customer more than 4 times per month by any channel

To create a global fatigue rule, login as a user that has the Audience Administrator responsibility.

Navigation: Administration > Fatigue Rules Setup

Notes

- **Global Contact Limit:** Enter a number to set an absolute limit to the number of contacts that can be initiated by the Marketing department to the customer – for a given time period. For example, if you do not want to contact a customer more than 2 times per month, enter **2** in this field.
- **Global Limit:** Use this drop-down menu to choose a time period for the numeric limit selected. For example, if you do not want to contact a customer more than 2 times per month, select **Per Month**.
- In addition to setting global limits, you can define further restrictions by selecting a marketing channel. If channel-specific rules are not set, then there is no limit per

channel (within the defined global contact limit.)

Within the limits set globally, you can also establish specific rules (thresholds) for each outbound channel.

- Includes all direct marketing channels: direct mail (print), email, fax, and telemarketing (phone)
- For example: of the 4 total contacts allowed per month, do not contact customer by phone more than 2 times per month.

When determining which rule to use (global vs. channel) the system will always use the most restrictive combination.

For Example, if you have a global rule (do not contact more than 4 times per month) and a channel specific rule (do not contact more than 2 times per month by email or fax) -- in this example, the system will first look at the channel contact limit. If further restrictions are needed, then the global rules would apply. In other words, if both global and channel specific rules are established, the most restrictive combination is used.

To create channel specific rules, login as a user that has the Audience Administrator responsibility.

Navigation: Administration > Fatigue Rules Setup

Notes

- **Channel:** Using the drop-down menu, select a channel for the fatigue rule. The channel selected here will, by default, always use the fatigue rule created. For example, if creating a fatigue rule for the "email" channel, select **email**.
- **Maximum Contact:** Enter a maximum contact limit for the selected channel. For example, if creating a rule that states you can only contact a customer 2 times per month (by email), enter **2** in this field.
- **Time Frame:** Select a time frame (per week, month, year, quarter) for the fatigue rule. For example, if creating a rule that states you can only contact a customer 2 times per month by email, then select **per month.**

When executing a campaign activity (containing a fatigue rule) the following concurrent program must be running in the background. This program must be scheduled and should simultaneously with schedule executions.

- **AMS: Apply Fatigue Rules**

Suppression Lists

Oracle Marketing helps companies comply with privacy policies by providing pre-defined suppression filters. Consumers can opt out of marketing activities in a number of ways - by unsubscribing from an e-mail activity, by informing the telesales representative, or by signing up for Do not Call registries set up by government. The Oracle Customer Model (TCA) has provision to capture contact preference of customers. This information is stored within the HZ_CONTACT_PREFERENCES table.

Based on the suppression information stored either within HZ_CONTACT_PREFERENCES or within user defined suppression lists, members are automatically suppressed during target group generation for a marketing schedule. Members within the target group are checked with the suppression list members and the matching records are automatically suppressed.

Seeded Suppression Lists

Out-of-the-box, Oracle Marketing provides the following seeded suppression lists:

- Do Not Contact for Persons and Organization Contacts
- Do Not Mail for Persons and Organization Contacts
- Do Not Email for Persons and Organization Contacts
- Do Not Fax for Persons and Organization Contacts

The seeded suppression lists are based on information stored in the HZ_CONTACT_PREFERENCES table of the TCA.

Creating Suppression Lists

In addition marketers may create user-defined suppression lists to prevent targeting specified categories of people. For example, an administrator can create a suppression list of all CEOs.

Navigation: Audience Administration Dashboard > Suppression Lists shortcut

Notes

- **Personalize:** The personalize page allows you the flexibility to control the number of rows displayed, the sort order, and any other filter criteria you may want to set. For example, show me all suppression lists where channel is E-mail. By default, the "All Suppression Lists" view is sorted based on the Last Updated Date (descending).
- **Channel:** More than one channel may be associated with a suppression list. When entering multiple channels, separate the names with commas.
- **Use for Suppression:** By default, any suppression source that you add is used for suppression. You can disable a suppression source by deselecting this field.

Implementing Contact Preferences

Customers of marketing activities receive marketing communication via different channels, such as e-mail, direct mail, fax, and phone. They may wish to select specific channels from which to receive communication and may also wish to modify their contact information.

Log in as the Audience Administrator to navigate to the Contact Preference page from the Audience Administration Dashboard. Select one or all options to include in the unsubscribe text box on the page. The options are listed as fields on the right hand side of the text box. Once you select an option; for example Email Channel, the text box displays an unsubscribe message that you can customize. This message is displayed alongside the unsubscribe check box on the preview page. Customers can select the check box to unsubscribe from the Email Channel as their contact preference.

The following contact preference options are seeded:

- All Channels
- Call Channel
- Email Channel
- Fax Channel
- Mail Channel
- Primary Contact Points

  If you add the Primary Contact Points option to the Contact Preferences page, the end users can update their primary e-mail address and primary phone number in the customer database. They can choose values from the active list of existing e-mail addresses and phone numbers from TCA.

> **Note:** For customers using previous releases of Oracle Marketing, as the administrator, you must explicitly insert the options currently available. After which, you can view the contact preference options available to them. Because end users can no longer update campaign opt out and product interest information, any suppression lists created based on this information in earlier releases will not be refreshed.

> **Note:** Functionality that allowed end users to update product interests or to opt out of specific campaigns, is no longer available.

Administering List Imports

To administer list import, you are required to perform one or all the following procedures:

- Implementing Existence Checking and Replacement Rules, page 4-41
- Importing Lists, page 4-43

Implementing Existence Checking and Replacement Rules

Existence checking uses predefined rules that are used only when the AMS: HZ_DEDUPE_RULES profile is set to "YES" at the site level. Existence Checking is done using fuzzy keys and word replacement rules. List import programs use algorithms to create any TCA entity.

Word replacement rules are defined in TCA and those rules are applied to the customer name while populating the key in the AMS_IMP_SOURCE_LINES table.

Existence checking is done for the following:

- Person
- Organization
- Organization Contact
- Address

Existence Checking for a Person

Existence checking is based on Person First Name, Person Last Name, Email Address, Phone Country Code, Phone Area Code, Phone Number, Address and Country.

First checks are done to see if the person exists with a provided E-mail address. If it does not exist then it checks with First Name and Last Name with phone attributes. If this fails then it looks for First Name and Last Name with address attributes. If this does not exist, then a new Person record is created (Party of type "Person").

Existence Checking for an Organization

Organization existence checking is based on:

- Name
- Address1
- Country columns

First it checks if an organization exists with the same name if it does not exists then it creates a new record. If it does exist then it checks if an organization record exists with this name, address1 and country. If it does not exists then it checks with name and country if this also does not exists then it picks up the maximum (party_id) record with the same name and without checking address1 and country column.

Even if pick up records with name, address1 and country or name and country it always picks up the maximum party_id for the organization name.

Existence Checking for an Organization Contact

Organization Contact Existence checking is based on:

- Person
- First name
- Last name
- Email address
- Phone area code
- Phone number
- Phone extension

The system checks if a person exists with the provided first name and last name. If this exists , it checks if a records exists with above details. If this does not exist, then it checks the first name and last name with the email address. If this also does not exist, then it checks the first name and , last name with the phone area code, number and extension.

Existence Checking for Address

Address existence checking is based on:

- Address1
- City
- Postal code
- Country

The List Import checks if there is a location for the provided address1, city, postal code and country column. If this does not exist then it checks for address1 with country and picks up that location if it is available. Otherwise, it creates a new one.

Existence Checking Using Original System Reference

Original system reference is a target field that has been added to the List Import process. This affects the existence checking logic in the following way:

- Organizations (B2B): If original system reference is mapped, existence checking will use this value along with organization name and other attributes, such as Address1 and Country to find the exact match. If it is unable to find matching record then existence checking is done without the Original System Reference column.
- Organization Contacts (B2B): If original system reference is mapped then existence checking will use this along with Organization Name, Person First Name, Person Last Name and other attributes, such as E-mail Address, Phone Area Code, Phone Number and Phone Extension to find the exact match. If it is unable to find matching records then the existence checking will be done without the original system reference column.
- Persons (B2C): If original system reference is mapped then existence checking will use this along with Person First Name, Person Last Name and other attributes like Address1, Country, Email Address, Phone Country Code, Phone Area Code and Phone Number to find the exact match. If it is unable to find matching records then the existence checking will be done without the Original System Reference column.

Importing Lists

Use the following sections to import lists:

- Importing Lists from XML or CSV Files, page 4-43
- Implementing List Import for Universal Work Queue, page 4-44
- Creating List Import User Hooks, page 4-45

Importing Lists from XML or CSV Files

Marketers have the ability to import lists from an XML or CSV file into Oracle Marketing. Based on the type of imported list data, the Import Wizard will walk a marketers through the steps.

XML Import

The XML import is available for the following:

- Organization
- Person
- Addresses

- Person addresses import

The XML import file must be in zip format. The zip must contain the following:

- XML File: This contains the B2B or B2C customer information, it can be in any format.

- DTD File: This file formats the xml data. For example, if the xml file contains a tag " address" the DTD file will format the tag into "address = city + state + zip" for the application.

B2B and B2C CSV List Import

A CSV import can be performed for any B2B or B2C type of import. For more information on how to perform a List Import, using XML or CSV see the *Oracle Marketing User Guide*.

Implementing List Import for Universal Work Queue

When Oracle Marketing is integrated with Oracle Telesales, the list import feature can be used to assign lists to TeleSales Agents. In this scenario, a TeleSales agent can log into Oracle TeleSales Universal Work Queue and access a list of customers assigned to them by the marketing team. This enables a list of prospects collected in marketing to be followed up on by the sales team.

Note that lead creation from Universal Work Queue is supported only for PERSON and ORGANIZATION CONTACT source types. The PARTY_ID column must be mapped in AMS_LIST_ENTRIES for both these source types.

To set up List Import for Universal Work Queue follow the procedures:

- Setting List Import and Work Queue Profiles, page 4-44

- Implementing List Import for Telesales, page 4-45

- Selecting the List in Telesales, page 4-45

Setting List Import and Work Queue Profiles

To enable the list to be displayed in Universal Work Queue the following profiles must be set:

- **AMS: Queue: Marketing Lists – Manual Assignment** at Site or Application level. This profile determines if a Telesales user can work on Marketing Lists – Manual Assignment.

- **AMS: Queue Order: Marketing Lists – Manual Assignment** at Application or Site Level. Choose a display order of 1-56. This profile determines the order of appearance for the "Marketing List – Manual Assignment" in the work queue in relation to the other Queue Order Profiles.

Implementing List Import for Telesales

To set up the List Import for Universal Work Queue, login as a user that has the Audience Workbench Super User responsibility.

Prerequisites:

- TeleSales Agent Responsibility is assigned to the user
- A csv file with the Sales Agent (i.e. the application login id for the sales agent) column is populated
- A Telemarketing Campaign Activity has been created in Oracle Marketing

Notes

- Import Mapping section: Map the sales agent column from the Source Column to the "Sales Agent ID" target field column. The Sales Agent ID is the application login id for the sales agent(s.).
- Import the data into Oracle Marketing and generate a list using the imported data.
- Associate the generated list to the Telemarketing Schedule created within Oracle Marketing.
- Generate the target group for this Telemarketing Schedule.

Selecting the List in Telesales

After the list has been created in Oracle Marketing it is available for use in Oracle Telesales. To verify that the list has been properly implemented, log in to Oracle Telesales and navigate to the Universal Work Queue tab.

Prerequisites: User has TeleSales Agent Responsibility

Notes

- **Work Type:** Select the Marketing List – Manual Assignment.
- View the lists that have been assigned to you from Oracle Marketing.

Creating List Import User Hooks

List Import pre and post user hooks allow you to write custom PL/SQL that is invoked during the list import process prior to list generation. The purpose is to allow you to cleanse the list before the list data is inserted into TCA (pre) and after (post) before list generation.

The following business events are used in the list import user hook process:

List Import - Pre Business Event: oracle.apps.ams.list.ListImportPreEvent.

List Import - Post Event: oracle.apps.ams.list.ListImportPostEvent

Setting Up Discoverer for Lists

Oracle Discoverer is a business intelligence/analytics application that is implemented with Oracle Marketing for list management purposes.

For more information on integrating Oracle Marketing and Oracle Discoverer see Integrating Oracle Marketing and Oracle Discoverer, page 2-21 in Optional Integrations.

Discoverer Queries and List Generation

A Discoverer query can be launched from within the Oracle Marketing application, and a list manager can create and manage workbooks and worksheets needed for list management purposes.

You can create a list of person and organizational contacts, and the organization information can be part of the attribute in organization contact list. When creating a list from Discoverer, you will need to select a mandatory identifier, which is a constant key. The other fields including "include organization", "include email", etc. are optional depending on what kind of list you want to generate.

Seeded Discoverer Business Areas Reference

There are two seeded Business Areas within Discoverer: Organization and Person. You can create workbooks for these business areas and use the workbooks for list generation.

Creating Workbooks in Discoverer

To create workbooks in Discoverer, you need to launch the Workbook Wizard and select the items from the Items tab. These are seeded Business Areas of either Organization or Person. From the Details page, enter the values for the business area to create a workbook.

Custom Business Areas

Similar to creating workbooks for seeded Business Areas in Discoverer, the workbook wizard contains pages where you can assign conditions and calculations to create custom business areas.

For more details on workbooks, see the *Oracle Discoverer Implementation Guide*.

Troubleshooting

My List status perpetually displays 'Generating' or 'Scheduled'. Why?

This happens when the Workflow Listener is down or service components are down. To resolve this issue try the following steps:

1. Navigate to Oracle Applications Manager > Workflow Manager (Your system administrator can provide this path).

2. Check if the Agent Listeners are up.

3. In case you need to refresh the Listeners, click the icon adjacent to the Listeners. This displays a list of all the Listeners.

4. Refresh the Listeners by stopping and restarting the services.

5. If the service components are down, then restart them with the Application DBA's help.

6. If this does not resolve the error, you might have to refresh the Concurrent Manager as well. Contact your system administrator.

   If you are still not able to resolve the problem, your system queue might be corrupted. Contact the database administrator to resolve it.

I carried out all the steps correctly to generate my list, but it still displays the status 'Failed'. Why?

Check the system log in the Generation mid-tab on the List Details page for the following errors:

- ERROR: ORA-20100: File l012345.tmp creation for FND_FILE failed

  Resolution: Contact the operations database administrator or the system administrator, and get additional space in the udump dir server.

- Errors related to table space or database shutdown.

  Resolution: Contact your DBA to resolve these errors.

Running a Script to Setup Schema in a Remote Database

Use the following steps to create schema used for remote processing.

Steps:

1. Login to SQL*Plus in the remote database.

   > **Note:** As a best practice, you should create a new schema and give access to tables and views which will be used for remote data processing. Typically this would be views and tables that will store

customer information with which you are going to create lists. By creating new schema, you are limiting apps user access to only the relevant tables and views which might be needed for list generation.

2. Download the zip file amsrlpkg.zip and unzip the contents.

3. Run the script amsremot.sql on the remote database (for the same schema). This script creates the following tables:

   - AMS_LIST_ENTRIES

   - AMS_HZ_WORD_REPLACEMENTS

   - AMS_LIST_HEADERS_ALL

   - AMS_LIST_SELECT_ACTIONS

4. Apply the following AMS .pls files :

   - amslgrms.pls

   - amslgrmb.pls

5

Implementing and Administering Data Mining

This chapter covers the following topics:

- Data Mining Overview
- Implementing Data Mining
- Administering Data Mining Functionality using Predictive Analytics

Data Mining Overview

Data Mining is the process of discovering patterns and relationships in large amounts of data. These patterns and behaviors are used to predict the behavior or customers and prospects.

A marketer uses the data by building "models" which act as a set of rules used to predict the value of a specific customer attribute. The prediction is based on the known values of other attributes. Oracle Marketing is integrated out-of-the-box with Oracle10g R2 Data Mining to build predictive models of customer behavior.

After installing Oracle Marketing, several implementation and administrative tasks must be performed to ensure that ODM is configured to fit your business needs.

Implementing Data Mining

A license for Oracle10g Data Mining Release 2 is a prerequisite for using data mining functionality within Oracle Marketing. Upon installation of Oracle Marketing, data mining functionality is automatically implemented. In other words, there are no additional *required* implementation steps.

The implementation steps listed in this section are optional and only necessary if additional functionality is required by specific business processes. This section assumes that Oracle Marketing and Oracle Data Mining are installed on the same database instance. Additionally, this section assumes the following:

- Oracle Marketing is implemented
- Oracle10g Data Mining Release 2 is implemented
- The seeded data sources reference information stored within:
  - Oracle Customer Model (Trading Community Architecture or TCA)
  - Interaction History
  - Order Management
  - Customer Intelligence

To perform optional implementation steps, see the following sections:

- Registering Your ODM Password with Oracle Application, page 5-2
- Activating the Data Mining Concurrent Manager, page 5-2
- Setting System Profiles, page 5-3
- Running Data Mining Concurrent Programs, page 5-4

Registering Your ODM Password with Oracle Applications

Registering the Oracle Data Mining (ODM) schema with Applications Foundation allows ODM to programmatically fetch the ODM username and encrypted password, thus avoiding the security risk of maintaining this information in a property file.

During the installation process the ODM schema is registered as an external schema with Oracle Applications and a default database username (ODM) and password is assigned. For security reasons, you should change this password.

To change the password, log in as a user with System Administrator responsibility.

Navigation: Security > ORACLE > Register

Notes

- Search for the ODM database user name, and change and confirm the password.

Activating the Data Mining Concurrent Manager

A concurrent manager is required exclusively for running data mining concurrent requests in order to avoid deadlock when multiple models or scoring runs are generated in parallel.

To activate the data mining concurrent manager, log in to Oracle Applications as a user with the System Administrator responsibility.

Navigation: Concurrent > Manager > Administer

Notes

- Activate Marketing Data Mining Manager

Setting System Profiles

Set the following data mining system profiles as mandated by your business requirements.

Data Mining System Profiles

Option	Required	Level	Setting	Effect/Limitation
AMS : Data Mining ODM Debug Enabled	Optional	User	Default value is No. If set to Yes - debug is turned on If set to No - debug is turned off	Enables debugging information to be written in the concurrent request log. This is optional because turning on debug is optional.
AMS: Default Fixed Cost for Optimal Targeting	Required	Site	0	Defaults the fixed cost in the Optimal Targeting page.
AMS: Default Margin per Order for Optimal Targeting	Required	Site	2	This profile enables users to set a default value for the margin per order. The profile value will be used for default calculations. Users can change the values as per their need.

Option	Required	Level	Setting	Effect/Limitation
AMS: Default Cost per Contact for Optimal Targeting	Required	Site	1	This profile enables users to set a default value for the cost per Contact. The profile value will be used for default calculations. Users can change the values as per their needs.
AMS: Default Conversion to Order Percentage for Optimal Targeting	Required	Site	5	This profile enables users to set a default value for order conversion rate. The profile value will be used for default calculations. Users can change the values as per their needs.

> **Note:** If the application and ODM are in the same database instance, set the profile AMS_ODM_DBLINK as NULL..

Running Data Mining Concurrent Programs

The data mining concurrent programs can be accessed by either logging into applications as System Administrator and navigating to Concurrent > Requests or by logging into Oracle Marketing as the Marketing Super User and navigating to Administration > Marketing > Predictive Analytics > Concurrent Requests.

Use the table below to run concurrent programs as mandated by your business requirements.

Data Mining Concurrent Programs

Concurrent Manager	Required	Responsibility	Description
Workflow Background Process	Yes	System Administrator	Parameters Form: • Item Type: AMS Data Mining - Build/Score/Preview • Minimum Threshold: Leave blank. • Maximum Threshold: Leave blank. • Process Deferred: Yes • Process Timeout: Yes • Process Stuck: Yes For the Workflow daemon to monitor data mining workflow requests, a frequency of 30 minutes should be sufficient.
AMS: Expire Data Mining Models	Optional	Oracle Marketing Administrator	Background process monitoring data mining models for expiration. A frequency of once a day should be sufficient.

Concurrent Manager	Required	Responsibility	Description
AMS: Update Data Mining Party Details	Optional	Oracle Marketing Administrator	Updates detail information collected on parties. The frequency should be the same as the Customer Intelligence Model (BIC) Summary Extraction process.

Administering Data Mining Functionality using Predictive Analytics

After implementing data mining, depending on your business requirements, several administrative procedures may need to be performed.

For more information see:

- Seeded Model Types, page 5-6
- Creating Custom Model Types, page 5-7
- Defining Seeded Data Source Attributes, page 5-8
- Creating new Data Sources for Data Mining, page 5-9
- Creating Targets, page 5-9
- Seeded Targets, page 5-10

Seeded Model Types

Oracle Marketing ships with seeded models. However, custom models can also be created. See Creating Custom Model Types, page 5-7 for more information on custom models. For more information on using the seeded model types, see the *Oracle Marketing User Guide*.

The following model types are seeded for data mining:

Data Mining Seeded Model Types

Seeded Model Type	Purpose
Response	Used to predict customers/prospects that are most likely to respond to your e-mail, telemarketing, or direct mail campaign.
Loyalty/Retention	Used to predict individuals or businesses that are most likely to defect from your organization. This type of model assists you in converting them to loyal customers.
Custom	Used to predict the value of any customer attribute in TCA or in a user-defined data source. For example, you can set up a custom model that predicts financial risk based on a credit score attribute or a custom model to predict likelihood of high credit card balances vs. low balances.
Product Affinity	Predicts the likelihood of purchasing a particular product. You can also use this model to predict propensity to buy within a given product category based on an analysis of all products in that category.
Customer Profitability	Predicts the likelihood of a customer relationship being profitable.

Creating Custom Model Types

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

For example, you might want to predict which customers are likely to respond to a direct marketing campaign or predict which customers are likely to buy a particular product. The possible values for the target field would be yes or no (i.e., a binary outcome).

A *custom model* type can be created to predict the value of any customer data attribute in the Oracle TCA customer data model (or in any user-defined data source) for customer information. This feature enables users to model any binary (Yes/No) customer behavior.

For example, marketers can set up a custom model to predict financial risk (based on a credit score attribute or a custom model) to predict likelihood of high credit card balances.

To create custom model types, you need to:

- Add New Lookup Code
- Restart HTTP Server
- Verify New Model Type

Add New Lookup Code

To create a new lookup code for the custom Model type, log in to Oracle Forms with Oracle Marketing Administrator Responsibility.

Navigation: Setups > Lookups

Notes

- Add the new model type to the Lookup Type: AMS_DM_MODEL_TYPE.
- **Meaning:** This will be the display name (in the Oracle Marketing drop-down menu) for the custom model type.

Restart HTTP Server

Lookup types are cached in the HTTP Server. Therefore, after creating a new lookup type, you must restart the HTTP server to refresh the data. The exact procedures for this step will vary depending on your environment.

Verify New Model Type

In order to begin using a new model type, you will need to setup the target field that the new model type will be predicting.

To verify the new model type, log in to Oracle Marketing as a user with super user responsibilities. Navigate to Administration > Marketing > Analytics > Targets and create a target. The custom model type you created must be visible in the Model Type drop-down list.

Defining Seeded Data Source Attributes

Oracle Marketing ships with seeded data sources that are used by both list generation and data mining functionality. The seeded data sources are editable. By default, all attributes (or columns) associated with the seeded data source are active. As the administrator, you must deactivate fields you wish to exclude for list generation and data mining analysis.

To define the data source attribute details for data mining, you should do the following:

- Select the Data Mining Details view within the Attributes mid-tab of a data source.
- Check the "Use for Data Mining" column to select attributes to be used for data mining.

Creating Data Sources

To create a data sources using Predictive Analytics, login as an Oracle Marketing Administrator.

Navigation: Administration > Marketing > Predictive Analytics > Data Sources > Create Data Source

For more information on creating Data Sources, see Creating Data Sources in the Audience Administration Dashboard, page 4-24.

Creating Targets

When marketers create predictive models, they are required to choose the model type and the target. As the administrator, you will need to set up the data sources and targets for the marketer. Terms are defined as follows:

- *Data Source:* A database table (or view) which is the source of data
- *Target:* Associates the data source, model type, and the target field. The target field is a column within the data source whose value you are trying to predict.

For example, you might define a target called "Laser Printer Indicator". This target associates a specific model type (say, Product Affinity), a user-defined data source (B2B: Orders Data Mart), and a target field (a column within the corresponding data source). When a marketer chooses the Product Affinity model type and the "Laser Printer Indicator," they can then build a predictive model to determine who is likely to purchase a laser printer by mining data stored within the corresponding data source (in this case the "B2B: Orders Data Mart").

Oracle Marketing currently supports binary outcomes for the target field. As such, the possible values for a target field must either be binary or must be mapped to a binary outcome. For example, if you are trying to predict high-income households, then you will set up the "Income" target field such that values greater than 100000 is defined as the positive target (yes) and the other values are non-positive (no).

Navigation: Administration > Marketing > Predictive Analytics > Targets > Create

Notes

- **Name:** Choose a name that logically represents the customer behavior being predicted. For example, if creating a target to predict customers who will purchase a laser printer, then name the target as "Laser Printer Indicator".
- **Model Type:** Select the Model Type that will use this target.

- **Target Field:** The target field selector LOV displays the attributes of parent data source as well as any selected child data source. Choose the target field within the corresponding parent or child data source.
- **Condition:** Use this column to select a condition operator for the target field.
- **Value:** Use this column to indicate a value for the condition selected. Certain conditions allow certain value inputs. For example, if the condition "=" is selected for the target field "Response", then an appropriate value could be "Yes". The text input is case sensitive and must match the value in the database exactly. Note: In this example, if the value for "Response" in the database is "yes", then the positive value of "Yes" will not match the database value.
- **Upper Value:** Use this column to indicate a upper value when "BETWEEN" is chosen as the condition operator. Only the BETWEEN operator requires a value in this column. For example, if using the target "household income" with the operator "BETWEEN" and a Value of "100000" and an Upper Value of "150000", then this would consider all household incomes between 100,000 and 150,000 to be positive target values. All other income values are considered non-positive. To build a valid predictive model, the data must contain positive and non-positive values.
- **Value Description:** Use this column to give your values a text description.

Seeded Targets

The following targets are seeded :

- B2C: Direct Mail Responders
- B2B: Direct Mail Responders
- B2C: E-mail Responders
- B2B: E-mail Responders
- B2C: Telemarketing Responders
- B2B: Telemarketing Responders
- B2C: Loyalty/Retention
- B2B: Loyalty/Retention
- B2C: Profitability
- B2B: Profitability

- B2C: Product Affinity
- B2B: Product Affinity

6

Implementing and Administering Campaigns

This chapter covers the following topics:

- Campaigns Overview
- Implementing Monitors

Campaigns Overview

Implementing Campaigns is slightly different than administering campaigns. Implementation tasks are considered one time setups. Administrative tasks, on the other hand, are ongoingand may require updates on a frequent basis.

This section includes tasks for implementing Oracle Marketing Campaigns. Procedures listed below relate to setting up functionality existing outside the Campaign Workbench.

To implement Campaigns, see:

- Implementing Campaign Users, page 6-2
- Creating and Verifying Lookups for Campaigns, page 6-2
- Running Concurrent Programs for Campaigns, page 6-7
- Implementing Templates, page 6-7
- Implementing Channels and Marketing Mediums, page 6-17
- Implementing Approval Rules, page 6-19
- Implementing Mandatory Rules, page 6-21
- Implementing Locking Rules, page 6-21
- Implementing Categories, page 6-22

- Implementing User Statuses, page 6-24
- Implementing Geographic Areas, page 6-25
- Implementing Marketing Source Codes, page 6-25
- Implementing Security for Marketing Objects, page 6-28
- Migration, page 6-28

Implementing Campaign Users

In Oracle Marketing, a user's ability to perform certain functions depends on the associated responsibilities attached to the user. Depending on job function and related day-to-day tasks, assign one or both of the following responsibilities to your users:

Marketing User Responsibility

This responsibility has the following visibility and privileges:

- Ability to create campaigns, activities, programs, budgets and budget security
- Ability to access the Campaign Workbench

Marketing Administrator Responsibility

This responsibility has the following visibility and privileges:

- Ability to perform all the functions of the Marketing User with the added privilege of having administration access.
- Ability to navigate from the Campaign Workbench to the Audience Dashboard through links.

The Marketing Administrator, at each site is required to manually update the custom menu structures to include the new functions provided in the application.

Updating and Verifying Lookups for Campaigns

As mandated by your business requirements, verify or update the following lookups.

Campaign System Lookups

Lookup Key	Value	Meaning
AMS_ACCESS_TYPE	GROUP	Group

Lookup Key	Value	Meaning
AMS_CAMPAIGN_STATUS	ACTIVE	Active
	ARCHIVED	Archived
	AVAILABLE	Available
	CANCELLED	Cancelled
	CLOSED	Closed
	COMPLETED	Completed
	DENIED_BA	Denied Budget Approval
	DENIED_TA	Denied Concept Approval
	NEW	New
	ON_HOLD	On hold
	PLANNING	Planning
	SUBMITTED_BA	Submitted - Budget Approval
	SUBMITTED_TA	Submitted - Concept Approval
AMS_CAMPAIGN_SCHEDULE_STATUS	ACTIVE	Active
	ARCHIVED	Archived
	AVAILABLE	Available
	CANCELLED	Cancelled
	CLOSED	Closed
	COMPLETED	Completed
	DENIED_BA	Budget Rejected
	NEW	New
	ON_HOLD	Active Locked
	SUBMITTED_BA	Pending Budget Approval

Lookup Key	Value	Meaning
SUBMITTED_BA, SUBMITTED_TA	Active	Active
	Archived	Archived
	Available	Available
	Cancelled	Cancelled
	Closed	Closed
	Completed	Completed
	Denied_BA	Denied Budget Approval
	Denied_TA	Denied Theme Approval
	New	New
	On_Hold	Active, but locked
	Planning	Planned
	Submitted_Budget Approval	Submitted for Budget Approval
	Submitted_Theme Approval	Submitted for Theme Approval
AMS_ CAMPAIGN_PURPOSE	Awareness	Awareness
	Lead	Lead Generation
	Lead_ Maturation	Lead Maturation
	Sales_ Readiness	Sales Readiness
AMS_ CONTACT_ POINT_TYPE	Address	Address
	Email	Email
	Fax	Fax
	Inbound_ script	Inbound Script
	Outbound_ script	Outbound Script
	Phone	Phone
	Website	Website
	Proposal	Proposal

Lookup Key	Value	Meaning
AMS_ MASTER_ OBJECT_ TYPE	Camp	Campaign
	CSCH	Campaign Activity
	EONE	One-Off Event
	EVEH	Event
AMS_ MEDIA_ TYPE	Broadcast	Advertising
	Deal	Deal
	Direct_Marketing	Direct Marketing
	Events	Events
	Internet	Web Marketing
	In_Store	In Store
	Public_Relations	Press and Analyst Relations
	Trade_Promotion	Trade Promotions
	Direct_Sales	Sales
AMS_ PRIORITY	Fast_Track	Fast Track
	High	High
	Standard	Standard
AMS_ PROGRAM_ OBJECTIVE	User Defined	
AMS_ PROGRAM_ STATUS	Active	Active
	Archived	Archived
	Cancelled	Cancelled
	Completed	Completed
	New	New
	On_Hold	Active, but locked

Lookup Key	Value	Meaning
AMS_ ROLLUP_ TYPE	Coll	Collection
	Deal	Deal
	ECAM	Campaign
	EVCAM	Event Promotions
	Partner	Partner
	RCAM	Program
	TRDP	Trade Promotion
AMS_ SCHEDULE_ OBJECTIVE	User Defined	User Defined
AMS_ TRIGGER_ CHK_ METRIC_ TYPE	Actual	Actual Value
	Forecast	Forecast Value
AMS_ TRIGGER_ CHK_TYPE	DIWB	Workbook
	Metric	Metric
	Static_Value	Static Value
AMS_ TRIGGER_ FREQUENCY_TYPE	Daily	The frequency of trigger checking
	Hourly	
	Monthly	
	None	
	Quarterly	
	Weekly	
	Yearly	
AMS_ TRIGGER_ TYPE	Metric_Metric	Metric to Metric type trigger
	Metric_Value	Metric to Value type trigger
	Metric_ Workbook	Metric to Workbook type trigger

Lookup Key	Value	Meaning
AMS_CAMP_ RELATED_ EVENT	EONE	One-Off Event
	EVEH	Event
	EVEO	Event Schedule

Running Concurrent Programs for Campaigns

Run the following concurrent programs for campaigns:

Campaign Concurrent Programs

Concurrent Program	Required	Description
AMS: Complete Campaign Activities	Optional	This program picks up active activities with an end date of today (or, an end date that has passed) and sets the status to Completed.

Implementing Templates

You can create campaigns and activities using seeded templates in the application. Oracle Marketing allows you to use seeded templates or create custom templates to suit your requirements. You need to perform this activity before creating a campaign or activity. The Campaign template provides a prebuilt framework for the end user to quickly and accurately create campaign activities.

> **Note:** Once you create a template, do not change the active campaign or activity templates.

Campaign Templates

The Campaign template provides a prebuilt framework for the end user to quickly and accurately create campaigns. You can log in as the Oracle Marketing Administrator and view the existing campaign templates as a summary list. These templates are associated with one or more campaigns, depending on how you created the template.

Activity Templates

Oracle Marketing ships with one seeded activity template for each outbound channel.

Attributes of an Activity template are:

- **Channel Category**: The user must select a category such as Advertising, In-Store, and Press and Analyst Relations before selecting a channel.
- **Channel:** Included in one or more activity templates and collateral types.
- **Activity Purpose:** Includes cross sell, up sell, customer retention, customer acquisition, and lead maturation.
- **Default List Templates**: Associated with activity purposes and used to create target groups for an activity. Create Audience segments with either the default list template or a specified template.

As the administrator, you can create customized activity templates to suit specific business needs. A customized activity template is an extension of a seeded template. As such, a customized template inherits the following:

- Channel
- Activity purposes
- Default list template associations (from the seeded templates)

The following templates are seeded:

- **Sales**: Used by a sales manager to create a campaign activity that generates leads followed up by the sales team.
- **Advertising**: Used to create advertisements.
- **Deal:** Used to create marketing deals like acquisitions or mergers.
- **Events:** Used to create events for campaign activities.
- **In-Store:** Used to create in-store activities like billing, check-in and check- out of goods from a store.
- **Press and Analyst Relations:** Used to create media related activities such as creating press kits and media analysis.
- **Trade Promotion:** Used for promotional activities such as setting up stalls in an exhibition.
- **Direct Marketing**: Used by the marker to create email, fax, or to print campaign

activities. When the end user creates a direct marketing activity they will choose either *Email, Fax, or Print* from the template drop-down menu.

- **Web Marketing**: Used by the marketer to create campaign activities for online or Internet marketing activities. This type of template assists the marketing team in creating Web ads that improve product brand, company awareness, or to alert a customer of new and upcoming products or deals.

- **Telemarketing**: Used by the marketing team to create campaign activities for call center or telemarketing purposes.

- **Web Offer**: Used by the marketer to create campaigns activities for Internet promotions.

- **Web Dynamic Recommendation**: Used by the marketer to create a activity for Web product recommendations. Product recommendations can be based on product relationships.

Seeded Sales Activity Templates

Attribute	**Seeded Value**
Outbound Channel	Sales
Activity Purposes	Cross-sell, Up-sell
Default List Templates (by activity purpose)	All list templates associated cross sell and up sell
Default List Template	Default List templates for Sales Activity Template: • Cross-sell: Used to cross-sell to businesses based on existing install base. • Up-sell: Used to up sell to businesses based on existing install base. The Default List Templates includes territory as the first mandatory data filter. If desired, the end user may choose another list template that is not based on Territory.

Attribute	Seeded Value
Available Mid-tabs	Required mid-tabs: • Offering (products and offers) • Target Group (segmentation rules) Optional mid-tabs: • Partners • Collateral, Scripts, Proposal Templates Collaboration: • Tracking
Fulfillment	Direct Sales Generates leads for all the list entries. The Leads Channel Selection engine should channel these leads to Direct Sales Channel, and specific Territories if applicable.

Seeded Direct Marketing Activity Templates

Attribute	Seeded Value
Outbound Channel	Email, Fax, Print
Activity Purposes	Cross- Sell, Up-Sell, Customer Retention, Customer Acquisition, Lead Maturation

Attribute	Seeded Value
Default List Templates (by activity purpose)	Default List templates for Direct Marketing: • Cross-sell: Used to cross-sell to businesses based on existing install base. • Up-sell: Used to up sell to businesses based on existing install base. • Customer Retention: Includes, default based on customer data source. • Customer Acquisition: Includes default sample third party data source. • Lead Maturation: Mature Leads based on low grade Leads.
Available Mid-tabs	Required Mid-tabs: • Offering • Target Group • Outbound Collateral Optional Mid-tabs: • Partners • Supporting Collateral, and Scripts, for Collaboration • Tracking (Includes Costs, Revenues and Metrics)
Fulfillment	Associated Outbound Channel (email, fax, print)

Seeded Web Activity Templates

Attribute	Seeded Value
Outbound Channel	Indirect Marketing Channel, Web
Activity Purposes	Customer Retention, Customer Acquisition
Default List Templates (by activity purpose)	For all Advertising channels, the user can choose marketing mediums at the Template level.
Default List Template	N/A
Available Mid-tabs	Required Mid-tabs • Offering • Collateral Optional Mid-tabs • Partners • Target Group: Although optional, there could be an intended audience for Advertisement and Web • Supporting Collateral, and Scripts for Collaboration • Tracking
Fulfillment	Associated Indirect Marketing Channel. For Web, the eMerchandising Engine handles fulfillment.

Seeded Telemarketing Activity Template

Attribute	Seeded Value
Outbound Channel	Direct Marketing

Attribute	Seeded Value
Activity Purposes	Cross-sell, Up-sell, Customer Acquisition, Customer Retention, Lead Maturation
Default List Templates (by activity purpose)	Default List templates for Direct Marketing: • Cross-sell: Used to cross-sell to businesses based on existing install base. • Up-sell: Used to up sell to businesses based on existing install base. • Customer Retention: Includes, default based on customer data source. • Customer Acquisition: Includes default sample third party data source. • Lead Maturation: Mature Leads based on low grade Leads.
Default List Template	N/A
Available Mid-tabs	• Offering • Collateral • Target Accounts • Collaboration • Partners • Tracking • Additional Information
Fulfillment	Associated Outbound Channel

Seeded Web Offer Activity Template

Attribute	Seeded Value
Outbound Channel	Web Marketing
Activity Purposes	Cross-sell, Up-sell, Customer Acquisition, Customer Retention, Lead Maturation
Default List Template	N/A
Available Mid-tabs	• Offering • Web Planner • Target Accounts • Partners • Tracking • Additional Information
Fulfillment	Associated Outbound Channel

Seeded Web Dynamic Recommendation Activity Template

Attribute	Seeded Value
Outbound Channel	Web Marketing
Activity Purposes	Cross-sell, Up-sell, Customer Acquisition, Customer Retention, Lead Maturation
Default List Template	N/A

Attribute	Seeded Value
Available Mid-tabs	• Offering • Web Planner • Target Accounts • Partners • Tracking • Additional Information
Fulfillment	Associated Outbound Channel

Creating Campaign Templates

You can create a campaign template and use the same template to create campaigns for your marketing initiatives.

You can edit or modify existing templates by clicking any template on the Campaign Template Details page. Log in as an Oracle Marketing Administrator to create a Campaign Template.

Navigation: Administration > Marketing > Initiatives Templates > Campaign Templates > Create

Notes

- **Name:** The template name should be intuitive and relevant.
- **Campaign:** Seeded type of campaign for which you can create a template.

The following types of campaigns are seeded:

- Campaign: A single campaign with any number of campaign activities.
- Collection: A collection of marketing initiatives rolled into a single campaign.
- Deal: A campaign to close a deal or an acquisition.
- Event Promotion: Activity to promote an event, such as a product launch.
- Partner Campaigns: Campaigns carried out in partnership with another company. For example, a campaign conducted by sister companies.

- Trade Promotion: Campaign to promote a specific trade or business.

Once you create a template you can view the template details on the Campaign Template Details page or on the Campaign Workbench, through the Campaign Dashboard on the home page.

Creating Custom Activity Templates

If the seeded activity templates do not meet your business requirements you can create your own. A custom template inherits all seeded base template associations including the outbound channel, sub-tabs, bins allowed, possible activity purposes and default list template for each activity purpose.

To create a custom activity template, login as a user who has the Oracle Marketing Super User responsibility.

Navigation: Administration > Marketing > Initiatives Templates > Activity Templates > Create

Notes

- **Name:** This is the name the user selects when choosing a template, therefore it should be intuitive and relevant.

- **Channel Category:** The values in the Channel Category drop-down menu are seeded, if necessary, they can be extended.

- **Channel:** Select the marketing channel.

- **Activity Purpose:** The values in the Activity Purpose drop-down are seeded and can be extended if necessary.

- **Default List Template:** If the activity type is Direct Marketing or Web Marketing, you will see an option to select a default list template.

  - For Direct Marketing activities, selecting a list template is *mandatory*.

  - For Web Marketing activities, selecting a list template is *optional*.

- The list templates displayed in the Default List Template drop-down are the templates created in the Audience Administration Dashboard.

- In the Components table, select the mid-tabs that will be displayed to the end user when creating this activity template. For example, if Main, Collateral, Offering, Target Group, Collaboration, and Partners are selected, then the end user will see these mid-tabs when creating this type of activity.

- To enable landing page URL tracking for indirect marketing channels, such as advertising, enable the Collateral mid-tab, through which the Landing Page URL definition functionality is enabled.

Note: For existing seeded and custom activity templates, to configure the Partners mid-tab functionality, navigate to the Activity Template Details page and enable the Partners mid-tab component.

Note: To enable marketers to associate Landing Page URLs to existing advertising and other indirect channel activities, navigate to the Activity Template Details page and enable the Collateral mid-tab component.

Note: You can also navigate to the Create Activity Template page from the Admin link on the Campaign Workbench. Click Campaign Dashboard on the home page to navigate to the workbench.

Implementing Channels and Marketing Mediums

Marketing Mediums relate to a specific channel used to execute a Campaign Activity. Therefore, they differ by activity. Certain execution channels, such as Oracle Advanced Outbound, require particular Marketing Mediums to be selected for a Campaign Activity.

For example, a Valentine's Day direct mail Campaign has a primary Campaign Activity. The Campaign Activity includes a channel category of Direct Marketing, a channel of Direct Mail, and a Marketing Medium of Direct Mail house. In this example, the Direct Mail house is the chosen execution strategy for this Campaign. In other words, the Valentine's Day Campaign will be executed through the mail.

Use the following procedures to create Channels and Marketing Mediums used in Campaigns.

Process Flow for Creating Channels

The following flow describes the process for creating a Channel.

1. Determine the channel and channel category

2. Determine the Marketing Media for the Channels.

3. Create the Channel. This task is performed by the Oracle Marketing Administrator.

Navigation: Administration > Marketing > Initiatives Setup > Channels > Create

Notes

- **Channel:** Enter a name for the channel.

- **Channel Category:** Seeded channel categories that you select to create a Marketing Channel.
- **Marketing Media:** Select the marketing media that you wish to create the channel in.

When you create a campaign activity, you can associate the following seeded channel categories to outbound collateral content - Advertising, In-Store, and Press and Analyst Relations. However, Sales and Telemarketing cannot be associated to the outbound collateral content. For more information on content types, see Creating and Managing Content Types.

For more information about performing the user tasks see the *Oracle Marketing User Guide.*

Process Flow for Creating Marketing Mediums

The following flow describes the process for creating a marketing medium.

1. Determine Business requirements for Marketing Mediums.
2. Create Marketing Medium. This task is performed by the Oracle Marketing Administrator.
3. Attach marketing medium to the channel which will be used to create the campaign activity.
4. Create a Campaign. This task is performed by a marketer or user.
5. Create Campaign Activity. This task is performed by a marketer or user.
6. Include Marketing Medium as part of the Campaign Activity. This task is performed by a marketer or user.

For example, assume that a Campaign "Valentine's Day Direct Mail" has been created. To accompany this Campaign, a Campaign Activity with the following attributes exists:

- Channel Category- Direct Marketing
- Channel - Direct Mail
- Marketing Medium - Direct Mail House

In this example, the Marketing Medium (Direct Mail house) is used as the execution channel for the Campaign (Valentine's Direct Mail).

For more information about performing the user tasks see the *Oracle Marketing User Guide.*

Navigation: Administration > Marketing > Initiatives Setup > Marketing Media > Create

Notes

- **Marketing Medium Name:** This should reflect the Campaign Activity, Channel Category and Channel it will be associated with.

- **Channel:** Choose the appropriate channel which this medium will support. For example, if the Marketing Medium is Direct Mail House, choose Direct Mail as the channel.

Implementing Approval Rules

Approvals can be used for all objects created within the Oracle Marketing application. It is possible to specify a business unit on an approval rule for a campaign activity, however the business unit does not appear on the campaign activity. Although not visible, the business unit is inherited from the campaign. In other words, approval rules for campaign activities use the business unit from the campaign (if specified).

For core Marketing, approval rules can be created on the following marketing objects:

- Campaigns
- Campaign Activities
- Events
- Event Schedules
- One-Off Events
- Offers
- Deliverables
- Claims

Overview of Approval Rules

The following is a list of terms and concepts for approval rules:

Concept Approval

Done prior to approving finances for Campaigns and Events. This approval is not required for the other objects.

Budget Line Approval

The method in which the money or expense associated with an 'Object' is approved. The requirement of 'Budget Line' approval for any Object is based on the 'Custom Setup' used for creating the Object. This approval is guided by the Budget category used while creating the Budget.

Budget Approval

The final approval for an 'Object'. This happens after the 'Theme' and 'Budget Line' approvals are met. The execution of this approval depends on the Budget 'Cutoff Percentage' being met. See Profile Option, AMS Cutoff Percentage for Approval.

Budget Request Approval

Type of approval is related to the Budget Transfers. Budget transfers are used to transfer funds between two Budgets. This approval is guided by the Budget category used while creating the Budget which the funds are being sourced from. Note: Child Budget creation is also similar to the Budget request approval.

Root Budget Approval

When a Budget is created in the Application, It cannot go 'Active' and be used by other objects without going through the 'Root Budget Approval'. Any Budget without a parent is a 'Root Budget'.

Understanding the Approval Process

If the Custom Setup selected for the marketing object requires both theme and Budget approval, the approval process will proceed in the following manner.

1. When the user changes the object's status from Planned to Active, the object goes through Budget Line approval.

2. Upon the next running of the concurrent process, the Budget Line approval is sent to an approver based on Approval Rules. At this time the object's status goes to Pending Budget Approval.

3. Once the threshold limit is reached, based on the AMS Cutoff Percentage for Approval, the Budget approval is sent automatically. It does not require a concurrent process. At this time the object's status is still at Pending Budget Approval.

4. The Budget approval is sent to an approver based on Approval Rules. Depending on the approval, the object's status will go to Active or Rejected.

    Note: For Campaigns and Events, the user first needs to go through the Concept Approval, and then move on to the Budget Approval. A campaign cannot be submitted for approval unless the requested budget amount is approved. This amount should be of a specific percentage of the initial budget estimate as specified in the profile AMS: Cut off Percentage for Approvals. If this condition is not met then the status of the campaign remains as Pending Budget Approval. All the other campaign details remain unchanged and a notification about the status is sent to the user.

Implementing Mandatory Rules

Mandatory Rules enable a company to control data entry by mandating that certain fields be entered on specific screens. In other words, rules can be created to make certain data fields mandatory. Certain values in the selected columns are seeded and cannot be changed or modified.

For example, when creating an Event, on the Event Details page, Program is not a mandatory field by default. Seeded, it is an optional field. If your business requirements mandate that users must select a value for this, then you can create a mandatory rule to enforce this business rule.

Navigation: Administration > Marketing > General > Mandatory Rule

Notes

- **Parent Object Type:** Select the object for which you want to create a mandatory rule.

- **Object Attribute:** Select the side navigational menu for which the field that must be set as mandatory appears.

Verify the rule by opening an existing campaign and navigating to the details page. Observe that the field you moved from the Available Fields column to the Selected Fields column is now marked as mandatory.

Implementing Locking Rules

Locking Rules are a way for companies to control data entry by disallowing updates to certain data at certain statuses. For example, if a marketer is not supposed to be able to update the Start and End dates of a particular campaign, the fields can be locked for this user. In this case, when the user navigates to the Campaign Details page, the Start and End dates will not be updatable.

By design, locking rules are ignored for the Oracle Marketing Admin User. In other words, when an Oracle Marketing Admin User is logged in, the fields which are supposed to be locked are updatable. An Admin user is a part of the resource group set through the profile AMS: Admin Group. If the user is not logged in as the Oracle Marketing Admin User, the fields will display according to the locking rules defined.

Navigation: Administration > Marketing > Initiatives Setup > Locking Rules

Notes

- **Parent Object Type:** Select the object for which you want to create a locking rule.

- **Object Attribute:** Select the side navigational menu for which the field that must be locked appears.

To verify the rule, log into Oracle Marketing as a user without the Admin user responsibility. Open an existing campaign and navigate to the details page. Observe that the field you moved from the Available Fields column to the Selected Fields column is now locked and cannot be edited.

Implementing Categories

Categories are used to group objects. They can be used as selection and search criteria to locate objects. For some objects, categories can be used to impose a business rule. Categories can be used in the following marketing functional areas:

- Deliverables, page 6-22
- Events, page 6-22
- Metrics, page 6-22
- Budgets, page 6-23
- Approval Rules, page 6-23

To understand and implement Categories see the following sections:

Deliverable Categories

Categories are used by Deliverables to group items together. While creating a Deliverable it is mandatory to choose the category to which it belongs. Examples of Deliverable categories are:

- Collateral
- Creative
- Email

You can create sub-categories to further define Deliverables. For example, you can define greetings or confirmation as sub categories under the e-mail category. Email is a special category of Deliverables. These will be used by Campaign Activities to send as e-mail when attached through the e-mail content screen in Campaign Activities.

Events Categories

Categories are used with Events to group or categorize them. Examples of Event categories are educational Events or partnered Events.

Metrics Categories

Category is used by metrics to classify the metrics. You can have different categories of metrics such as cost, revenue, leads or opportunities. When you create a rollup or summary metrics, the system ensures that the metric rolls up or is summarized to the metrics of the same category.

Budgets Categories

Budgets use categories to integrate to Oracle General Ledger. Budget categories can also be used to verify Budget eligibility for Campaign Activities.

Approval Rules and Categories

Approval rules for Deliverables can be linked to Deliverable categories. Approval rule for Budgets can be linked to Budget categories. This means that all Budgets falling within that category would use that particular rule for approval when drawing money from those Budgets.

Setting Up Deliverable Categories for Custom Setups

Custom setups for Deliverables can be created for using Deliverable categories. Therefore, all deliverables using that category will use the custom setup created for the category attached.

To create a Deliverable for a custom setup, you need to:

- Create a Category
- Verify a Category

Creating a Category Notes

- **Enabled:** Select to make the Category available.
- **Created For:** This is the marketing object for which you are creating the category.
- In case of metrics or Deliverables, make sure the parent–child relationship is captured correctly.

> **Note:** Oracle Marketing contains seeded categories for Deliverables and Events. Disable categories that are not needed.

Verifying a Category Notes

- Navigate to the Deliverables tab and verify that the Category and Subcategory fields display values in the drop down menu.
- Navigate to the Events tab, create an event, and verify that the Category field displays values in the drop down menu.
- Navigate to Administration > Marketing > General > Metrics and verify that the Category field displays values in the drop down menu.

Implementing User Statuses

System statuses drive certain behaviors of Marketing objects. User statuses, on the other hand, can be created on top of system statuses. User statuses do not drive behavior, but can be used for the purpose of classification. By setting a User Status, you can configure the values of the object's "status" field. This improves usability and analysis of objects within the application.

For example, a Campaign can have a system status - cancelled. The seeded user status for Campaign with a cancelled status is cancelled. This means that when a Campaign's status moves to cancelled, the user interface status field reflects the value "Cancelled".

The system status can be extended using user Status to enhance the analysis and reporting functionality. One such method would be to add a cancellation reason to the cancelled status.

For example:

- Cancelled – ROI Below Expectation
- Cancelled – Competitor Campaign
- Cancelled – Product Overlap
- Cancelled – Executive Rejection

Seeded User Statuses

All enabled user statuses are available in the Campaign Status LOV. Seeded user status values are marked Enabled and Default. This means that the system status value will show up for objects as the default value. System status values cannot be disabled.

New user status values can be created. Once a new user status is created for a combination of activity and status and marked enabled, the seeded system status value automatically looses its default flag. There cannot be two default user statuses for given combination of activity and status.

Creating User Statuses

Multiple Users Statuses may be created and enabled for a particular System Status. All functionality and rules associated with the system status will be applicable for the user status created for that combination.

Navigation: Administration > Marketing > General > User Status > Create

Notes

- **User Status:** This will replace the System Status for the marketing object.
- **Enabled:** Select this check box to make the User Status available.

- **Default:** Select this check box in the overview screen to set this User Status as a default. If not selected, the seeded User Status will be reflected on the Campaign. On update, the default value on the seeded User Status is automatically removed.

Implementing Geographic Areas

Geographies are created in two sections. First the Geographic Location Types are created and then Geographic Areas are created. Each Geographic Area has a Geographic Location Type associated with it. Run the Concurrent Manager Program, **Load Geographic Hierarchies**, any time Geography is modified.

Navigation:

- Administration > Marketing > Geography > Location Type
- Administration > Marketing > Geography > Geographic Area

Notes

- The Geographic hierarchy should be created from the top down.
- **C Region:** use this field for regions within a Country
- **S Region:** use this field for regions within a State

Implementing Marketing Source Codes

Source codes are unique identifiers for the following marketing objects:

- Events
- Event Activities
- Offers

Source codes play an important role in marketing because the customer, most often, interacts with the application using a source code. Source codes are stored with orders to track the effectiveness of an Event, or Offer.

Source Code Construction

Source codes are constructed using various components. The maximum number of characters in a source code is 30. The Geography Code comes from the geographic area code entered in Geography. The source code may contain any of the following components:

- Geography Code
- Month Code

- Activity Code
- Source Code digits (maximum number equals 30 - total of other components)

Source Code Schema

Each marketing object has a column referencing the source code. This source code is unique throughout the application. Given a source code, it can be traced back to its marketing object by looking at the AMS_SOURCE_CODES table.

Source Code Schema Reference

Table	Object ID Fields	Source Code Fields
AMS_CAMPAIGNS_VL	CAMPAIGN_ID	source_code
AMS_CAMPAIGN_SCHEDULES_VL	SCHEDULE_ID	source_code
AMS_EVENT_HEADERS_VL	EVENT_HEADER_ID	source_code
AMS_EVENT_OFFERS_VL	EVENT_OFFER_ID	source_code
AMS_OFFERS_VL	OFFER_ID QP_LIST_HEADER_ID	offer_code
AMS_SOURCE_CODES	SOURCE_CODE_ID	source_code arc_source_code_for source_code_for_id related_source_code related_source_object related_source_id

The following table shows definitions for the AMS_SOURCE_CODE table:

AMS_SOURCE_CODE Table Definitions

Column Name	Field Type	Description
SOURCE_CODE_ID	NUMBER	Unique identifier for the source code table
SOURCE_CODE	VARCHAR2(30)	Unique identifier for all the marketing objects. Source codes are communicated to the customers.
SOURCE_CODE_FOR_ID	NUMBER	FK to the marketing object to which the source code points to.
ARC_SOURCE_CODE_FOR	VARCHAR2(30)	Four letter code that points to a marketing object (EVEH = Event headers, EVEO = Event Schedules, EONE = One-Off Events, OFFR = Offers)
ACTIVE_FLAG	VARCHAR2(1)	Flag to indicate if the source code is active or not.
RELATED_SOURCE_CODE	VARCHAR2(30)	Source code of the related object. This is used in case of Event promotions. The customer is interested in the related Event that the Campaign is promoting rather than the Campaign itself.
RELATED_SOURCE_OBJECT	VARCHAR2(30)	Four letter code that points to the related marketing object (EVEH = Event headers, EVEO = Event Schedules, OFFR = Offers)
RELATED_SOURCE_ID	NUMBER	FK to the marketing object to which the related source code points to.

Implementing Security for Marketing Objects

Oracle Marketing has a security model for marketing objects that enables a central office to manage not only high-level programs, but also specific campaigns and activities. You can choose to limit access of one or more marketing initiatives to only those users or marketers who are within a specific marketing team. You can set a program, campaign, or event to be confidential and limit the access. However, marketers can choose to give limited access to people outside their teams by setting a marketing initiative to be non-confidential. Security for campaign and event schedules is derived from their parent objects. Home page reports also adhere to the team access security model.

Team Security

Team members can access marketing activities depending on the access level you provide to them as an Administrator. These marketing activities inherit the team from the parent campaigns.

Oracle Content Manager Security

Oracle Content Manager offers granular level access to users based on folder security in its repository. Thus, if a marketer has access to a marketing initiative, he or she also has access to the contents associated with that initiative. So long as the user has access to these contents, he or she can also associate the contents with the accessed marketing initiatives.

Migration

Campaigns must be migrated to ensure that the product reports are accurate.

However, the underlying data from the existing campaigns do not change, but data from the following campaign attributes would be affected with the migration:

- **Campaign Name:** If the Campaign has a specific version identified, the Campaign name is shown as - <Campaign Name><_><Campaign version>. The campaign version is now obsolete, and there might be more than one campaign with an identical name. To keep every campaign unique, the corresponding version needs to be migrated to a Campaign where the name is derived using the Campaign Name and the Version. Campaigns without multiple versions will not change.

- **Campaign - Product Category Associations:** Ensure that the Product categories have already been migrated or upgraded to Single Product catalogs. Product categories associated with an existing campaign will not change due to migration. Hence, the primary flag for these categories remains intact.

- **Campaign - Product Associations:** Ensure that all the Products associated with existing Campaigns belong to a Single Product Catalog. Identify all such products that are associated with the Campaigns, but are not part of the Single Product

Catalog. If any, manually include these products into the Single Product Catalog. Subsequently, update these products in the Campaign-Product association schema.

- **Campaign - Product association (Primary flag) :** If the campaigns have associated product categories or product, there might be no product association set as primary. Hence, if there is at least one product category or product associated with the campaign, mark it as the primary association unless the user selects another product category or product association to be set as primary.

Implementing Monitors

Monitors enable marketers to improve marketing communications by automatically executing activities on marketing initiatives when specific customer or business situations arise.

This functionality is particularly valuable because customers have become sensitive to mass and/or inappropriate marketing communications. Therefore, the monitor's precise ability to execute marketing initiatives based on predefined conditions provides a key marketing advantage.

You can monitor the following initiatives by logging in as the Marketing User:

- Activity
- Campaign
- Event
- Event Schedule
- One Off Event
- Program

Note that you can monitor only one initiative at a time.

Monitor Terms and Definitions

Term	Definition
Monitor	A mechanism that enables an action to be performed on a specific marketing initiative. This mechanism is based on predefined conditions set to compare initiative performance measures. In other words, comparing the metric values of the initiatives. If the condition defined for the monitor is satisfied, an action is invoked.
Follow On Actions	Once a condition is met, the monitor triggers an action. The following actions are supported: Seeded Marketing Actions: • Sends notification to a specified resource • Executes associated marketing initiative Custom Marketing Actions: • Using custom logic, a non-seeded action can be created.
Monitoring Condition	A condition to monitor a specific initiative. These conditions use metrics to measure and compare the performance of Marketing initiatives. The following metric values are tracked for comparison: • Actual • Forecast • Variance • Variance Percent

Term	Definition
Monitoring Frequency	Defines the frequency in which conditions are checked for satisfaction. A monitor runs for a set period of time and conditions are verified only for that period. Monitor Repeat Units: • Hour • Day • Week • Month • Year
Follow On Action	A follow on action personalized by the user, once the monitor condition is met.
Notification	A notification sent to a specified resource, once a condition is met.
Activity	An activity that the monitor needs to perform, once a condition is met.

Monitoring Based on the Metric Values of a Single Initiative

As a marketer, you might have specified metrics to an initiative that allow you to specify certain performance goals (forecast values) and to track this performance on various fronts including responses, leads, opportunities, orders, and revenue.

For example, a you may expect a marketing campaign to bring in a certain number of responses and leads. You may have set a forecast value to determine how many of those leads would finally earn you the desired revenue. After the activation of this Campaign, you need to monitor the performance against these anticipated goals to see whether the campaign actually brought in the expected number of leads and revenue.

For each metric of marketing initiatives (Campaigns, Campaign Activities, Events, Event Schedules, One Off Events, and Programs) that need monitoring, the following values are tracked:

- Total Forecast - Includes forecast rollup from all the child components that roll up to this program, campaign, or event and the forecast set at the program, campaign, or event level.

- Total Actual - Includes the actual rollup from all the child components that roll up to this program, campaign, or event and the actual set at the program, campaign, or event level.
- Variance - Calculated as Total Actual - Total Forecast.
- Variance Percent - Percentage compared to the forecast value.

Monitor Actions

Comparison	Action
Compare the Total Forecast against the Total Actual value for a metric.	Notify if the Campaign did not fetch as many responses as forecasted three months after the Campaign activation.
Compare the Total Actual value against a specific Target Value, for a specific metric	Notify if the number of leads did not reach 5000 even three months after the Campaign activation.
Compare the Total Actual value against a specific Percentage Value of the Total Forecast, for a specific metric	Notify if the Campaign has not made at least 70% of its Forecasted revenue six months after the Campaign activation.
Compare the Variance against a specific Percentage Value of the Total Forecast, for a specific metric	Notify if the cost variance becomes more than –5% (minus 5%) of the Forecast Cost (Check if the Campaign has spent more than the Forecasted Cost).

Monitoring Based on Metric Values of Two Initiatives

Comparisons are made between the actual values of two metrics and notified. In a typical marketing scenario, based on previous experiences, companies might have arrived at some industry standards for expected Marketing Campaign results.

For example, it may have been established that Oracle Open World fetches 1000 walk-in registrants and the event planning may have been done based on that assumption. But if there were to be 2000 walk-ins for a specific event, the event planner may need to get notified. If such norms or standards for Marketing Campaign Results can be established and tracked as Forecast for that metric, the Forecast to Actual comparisons would work just fine. In this case, if the "Walk-In Registrations" were created as metrics, the Forecast for that metric could be 1000. When the actual value for the same metric is recorded as double in the next forecast, a notification can be sent to the event planned based on

Forecast to Actual comparison of this metric.

Monitoring Based on Metric Values of a Custom Query

Compares a Marketing object's metric value to a custom query, such as a Discoverer workbook value. When using this type of condition, a metric value is compared to a remote data source (using a workbook). For example, a person's monthly spending (metric) can be compared to his or her average monthly spending (calculated using the Discoverer workbook).

Repeating Schedules

Repeating schedules can re-run based on a date or upon a status change of repeat instances. When a repeating schedule re-executes, a new copy of the schedule is made and the original schedule is preserved. When the condition is met, the monitor picks up the new schedule; the schedule runs based on its defined criteria. The new schedules executes and the old schedule is preserved.

In other words, each execution is a new instance of the schedule. Therefore a marketer is able to separately track campaign responses for each schedule. For example, a trigger activates schedule A and it runs for a specific period of time. When schedule A is ready to repeat (based on the repeat unit), a copy of schedule A's information is made and becomes schedule B. Schedule A's information is preserved, and schedule B becomes the active schedule. This cycle repeats until the end date is reached. All schedule information is separately preserved so it can be individually viewed for tracking purposes.

> **Note:** Ensure to run the FND concurrent program 'Synchronize Workflow Roles' for synchronizing any new FND users with their corresponding workflow roles.

7

Implementing and Administering Tracking Metrics

This chapter covers the following topics:

- Tracking Metrics Overview
- Understanding Metrics
- Implementing Metrics
- Seeded Metrics Reference

Tracking Metrics Overview

Metrics are measurements used for tracking the effectiveness of marketing activities. Metrics include both forecast and actual values. These values are either added manually or automatically calculated by the Marketing application. Metrics can also be used to initiate Campaign Triggers. For example, a Responses Count metric greater than a desired value could be used to trigger a follow-up Campaign Activity to a larger audience.

Understanding Metrics

To understand metrics see the following sections.

- Understanding the Metric Object Hierarchy, page 7-2
- Understanding Summary Hierarchy, page 7-2
- Understanding Rollup Hierarchy, page 7-2
- Understanding Formula Metrics, page 7-4
- Creating Metrics for Control Group Analysis, page 7-5

- Understanding Metric Calculation Types, page 7-6
- Understanding Metric Display Types, page 7-7
- Understanding Metric Currency Values, page 7-7
- Working with Metric Templates, page 7-7

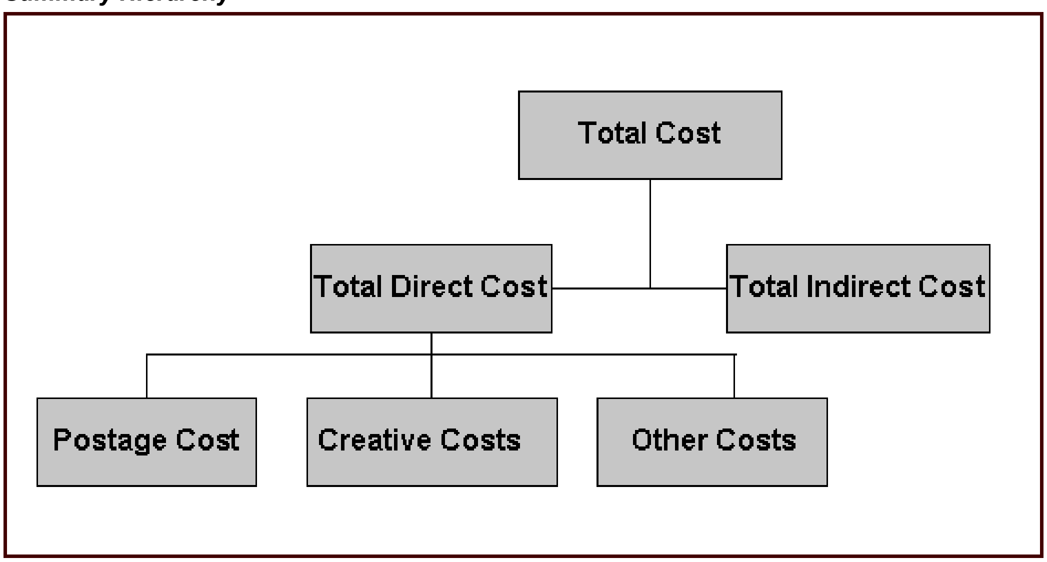
Understanding the Metric Object Hierarchy

The metric hierarchy dictates how objects relate to each other and how their associated metric values will rollup within the hierarchy. Ultimately, the metric hierarchy dictates how metric values will be totalled across marketing objects.

Understanding Summary Hierarchy

Within a single marketing object, metrics of similar categories (cost, revenue, response, and so on) are organized into summary hierarchies. For example, within a direct mail campaign activity, cost-category metrics can be related hierarchically as shown in the following figure:

Summary Hierarchy

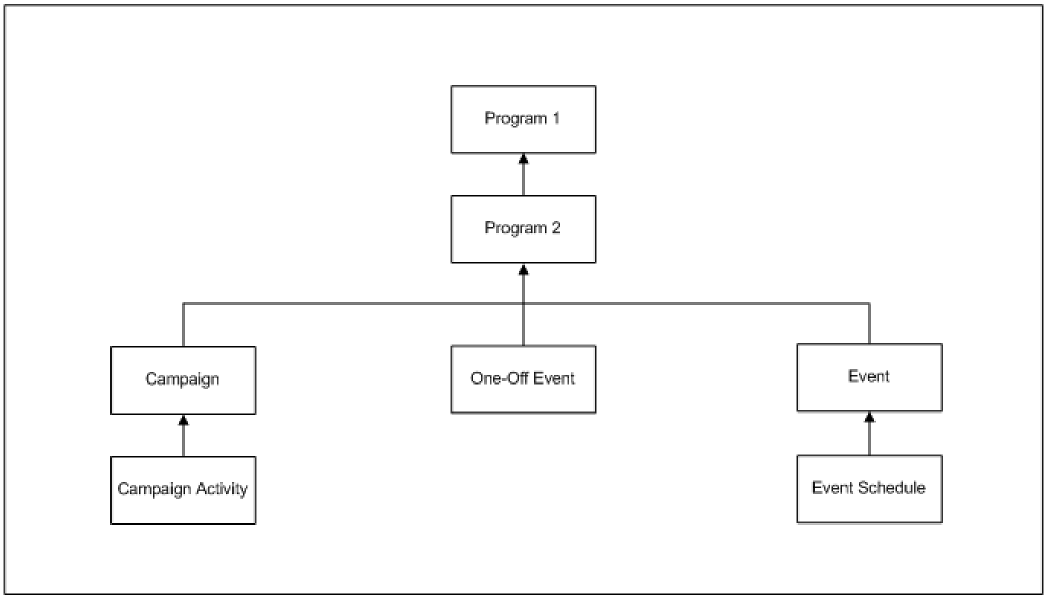


In this example, Postage Cost, Creative Costs, and Other Costs are summarized to Total Direct Cost. These lower level costs are added to Total Indirect Cost (for example, overhead expenses) to obtain Total Cost for the Campaign Activity.

Understanding Rollup Hierarchy

The Rollup Hierarchy refers to links between metrics of different objects within the marketing object hierarchy. A typical marketing object hierarchy is shown in the following figure:

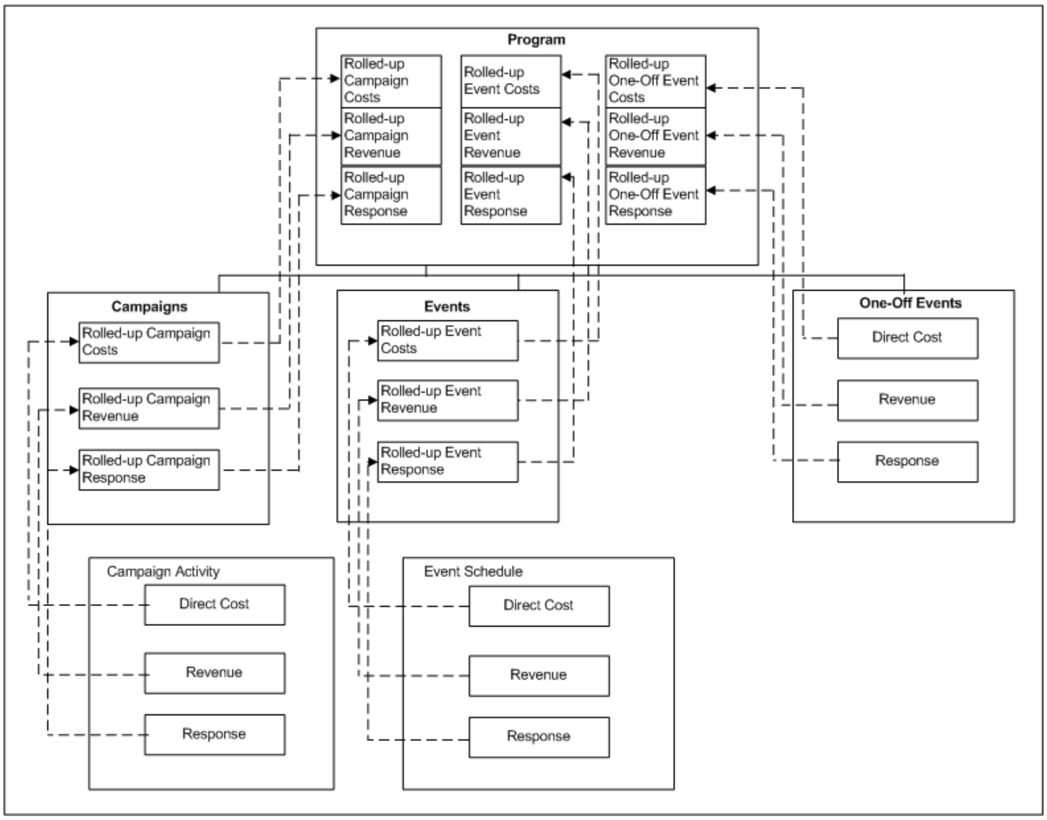
Rollup Hierarchy



The Rollup Hierarchy enables metrics from lower-level marketing objects (for example, Campaign Activities and Event Schedules) to be rolled up to parent objects (Campaigns and Events) and grandparent objects (Programs).

The following figure represents a detailed Rollup Metric Hierarchy. In this example, Direct Costs, Revenues and Responses are rolled up the marketing object hierarchy from the Schedule level to the Campaign/Event level to the Program level.

Marketing Rollup Metric Hierarchy



Understanding Formula Metrics

Using metric formulas, you can measure the effectiveness of a marketing object based on a composite value calculated from different metrics. Using formulas, the marketing department can understand activity effectiveness better.

Formula metrics:

- Calculate composite values from other metrics defined for the same object type.
- Can be used in the metrics side navigation menus for measuring the performance of various marketing objects.
- Is calculated as null if the dependent metrics are not assigned to the same object.
- Perform basic mathematical calculations including, addition, subtraction, multiplication, and division, along with a parentheses for grouping.
- Is defined by a unique name for a particular object type so that the calculations are consistent throughout the system for the same formula.

A formula is defined with a unique name for a particular object type so that the calculations are consistent throughout the system for the same formula. Formulas can also be defined generically for object type "Any". The sources of variables for the formula metrics type "Any" are either categories or rollup and summary metrics. For example, to define the ROI formula of type "Any" the source values can be defined as the categories cost and revenue, then the ROI formula can be attached to all supported marketing objects, because there are no object specific dependencies. The category variable will total all the lower level metrics (manual, function, and rollups) within the same category. For a sub-category, only the metrics within the same sub-category are added. The variables within the formula are only from the metrics associated with the same object type. When a formula is added to an object, the relevant metrics are automatically added.

Formula metrics calculate measures based on other metrics. This is an extension of the metrics calculation types. Formula metrics can be used in the metrics side navigation menus for measuring the performance of various marketing objects. A Formula Metrics can calculate composite values from other metrics defined for the same object type. If the dependent metrics are not assigned to the same object the formula will calculate null. Formulas can perform basic mathematical calculations including, addition, subtraction, multiplication, and division, along with a parentheses for grouping.

Creating Metrics for Control Group Analysis

Metrics for Control Group Analysis helps the marketer make a precise comparison between the Contact and Control Groups. While making this comparison, the system, instead of viewing all the metrics for an activity, chooses the metrics specifically collected for the Control Group Analysis within the Control Group Analysis Report.

Summary metrics selected for Control Group analysis comprises two child metrics to represent the Control and Contact Group data respectively. This helps the system identify the control and contact groups and appropriately calculate response rates.

Set up metrics for Control Group analysis in the following formats:

- **Top Level Metric:** Represents the total metric value for the Target Group. For Example, inferred orders can be a top-level summary metric to hold the inferred orders for the target group. The base data for this is selected to "Target Group".

- **Contact Group Metric:** Function or Manual metric for Contact Group. Summarize this to the Top Level Metric. For Example, Contact Group Orders summarizes to the Inferred Orders. The base data for this is selected to "Contact Group".

- **Control Group Metric:** Function or Manual metric for Control Group members. Summarize this to the Top Level Metric. For Example: Control Group Orders summarizes to the Inferred Orders. The base data for this is selected to "Control Group".

Navigation: Administration > Marketing > Initiatives Setup > Metrics > Create

Notes

Calculation Type: Select Control Group Analysis. This is required as there can be numerous metrics but it might not be meaningful to display all the metrics within all the measurement areas within the application.

Only those metrics identified for Control Group Analysis are displayed in the Control Group report. You are still required to associate the metrics to an activity. The Control Group Analysis checkbox is available only while defining a summary metric.

Creating Child Metrics for Control Group Analysis

Users can create the two child metrics when a summary metrics with Control Group analysis is created. This also reduces the number of steps to set up a proper metric infrastructure for Control Group Reporting. Clicking the Control Group Analysis checkbox will navigate the user to the Child Metrics page.

Navigation: Administration > Marketing > Initiatives Setup > Metrics > Create

Notes

Calculation Type: Once you select the checkbox the page refreshes to display the Child metrics section. There is no section header for this section. Instead this information is displayed at the bottom of the page. The metric name and the type are mandatory fields. Enter the child metric name before saving the summary metric.

Select the Manual option by default. If you select the Function radio button, you are mandatorily required to enter the Function name. After you create the Summary metric and child metrics, the Control Group Analysis child metrics is displayed with the Metric Names as hyperlinks. As an administrator, you can drill down to the child metric detail. The Control Group child metrics section is not displayed for Rollup metrics or for Summary metrics not identified for Control Group Analysis.

Understanding Metric Calculation Types

The metric calculation type determines the way in which forecast and actual values for a metric are entered into the system.

The following metric calculation types are available:

- Manual: Receives both forecast and actual values from user input.

- Function: Receives actual values from a custom PL/SQL function or stored procedure. This function or procedure contains logic for calculating the actual value based on information within the Oracle E-Business Suite.

- Summary: Receives both forecast and actual values from lower-level metrics in the summary hierarchy. May have subordinate metrics of any type (summary, manual, rollup or function) within the same metric category (Cost, Revenue, Response, and so on). This metric is automatically associated with a marketing object when any subordinate metric is associated.

- Rollup: Receive both forecast and actual values from lower levels in the marketing object hierarchy. Only manual and function metrics within a lower-level object (for example, Campaign Activity) can be linked to a rollup metric in a higher-level object (for example, Campaign). All child metrics of a rollup metric must be in the same metric category (Cost, Revenue, Response, and so on).
- Formula: Enables a marketer to measure the performance of a marketing object based upon a composite value. Marketers can define a formula based upon relevant metrics to calculate this composite value.
- Control Group Analysis: Enables a marketer to create two child metrics when a summary metric with Control Group analysis is created. This reduces the number of steps required to set up metric infrastructure for Control Group Reporting. Control Group Analysis is required for the system to identify control and contact groups and appropriately calculate response rates for the metric.

Understanding Metric Display Types

It drives the method in which metric values are rendered on the screen. Possible types are integer, percent and currency. Integers are displayed and saved as whole numbers.

Understanding Metric Currency Values

Metrics with the categories of Cost and Revenue have an attribute of "Currency". Two currencies apply to each metric, one for the displayed (transactional) value and one for the internal (functional) value.

Rollup and Summary metrics display the currency value according to the marketing object's currency. Manual and Function metrics are defaulted to the marketing object's currency but may be changed for each metric. All Cost and Revenue metrics are rolled up using the internal functional currency, which is the same system wide. Use FND_PROFILE.VALUE ('AMS_DEFAULT_CURR_CODE') to determine functional currency.

The transactional value is rounded to the GL 'Minimum Accountable Unit'. The function value is stored without rounding to maintain required precision when converting to the displayed (transactional) currency.

For example if the transactional currency is Mexican Paso (MXP) and functional currency is US Dollar (USD), with the conversion rate of 15,000 MXP/USD then conversion from 10,001 MXP to 0.67 USD (rounded), converting back produces 10,050 MXN, and removing the rounding on the functional currency produces 0.66673333 -- USD to 10,001 MXN.

Working with Metric Templates

Metric templates enable you to standardize the metrics associated with a marketing activity. For example, you can define a metric template that automatically associates specific call center costs to all new telemarketing activities. To streamline template setup and administration, each template is associated to a single marketing activity type for example, email, telemarketing, direct mail) or a single marketing object type (for example, Campaign, Campaign Activity, Event, Event Schedule).

To understand and implement Metric Templates see the following sections:

- Creating a Metric Template, page 7-8
- Enabling Metric Templates, page 7-9
- Using Metric Templates, page 7-9

Creating a Metric Template

Before you create a Metric Template, ensure that metrics have been defined.

Navigation: Administration > Marketing > Initiatives Templates > Metric Templates > Create

Notes

- **Name:** The metric name value must correlate with the marketing object it is associated with.
- **Enabled:** Select to have the template enabled on creation.
- **Associated With:** Select either Object Type or Custom Setup. A Metric Template can be associated with either a marketing object (campaigns, events, and so on) or with a custom setup. If the metric template is associated with a marketing object, all metrics added to the template would have the same "Used With" value.
- If the metric template is associated with a custom setup, all metric added to the template will have the same used with object as the custom setup.
- Existing templates, which refer more than one object type, are to be split into each object type. The Metrics and Custom Setups would be distributed according to the same Object Types to the new templates.
- **Association Name:** Use the flashlight icon to display a list of all the custom setups (in the case where you have selected *custom setup* in the Association Type drop down.) If you have selected *used with* in the association type drop-down, a list of all the object types (for example, Campaign Activities, Campaigns, and so on) is displayed when selecting the flashlight LOV.
- **Define Metrics table:**
    - **Metric Name:** Select the metrics that will be part of this template.

- **Used With:** This shows what types of object the metrics can be assigned to. The associations include defining which object types or custom setups these metrics are assigned to on creation.

- **Enabled:** Select this to enable the metric for this template.

Enabling Metric Templates

Enabling occurs at each level of the metric template. The entire template is enabled or disabled, or with each metric individually. If the template is disabled then the associations and metrics within are ignored. If metrics are disabled within the template then those metrics are not assigned (at least because of this template, but another template could still assign that metric).

Using Metric Templates

Usage of a metric template is transparent to the marketer creating the business object. When the marketing object is created, the metric templates are all searched to generate a composite list of metrics to assign. The metrics are required to have the same "Used With" object type as the new business object. The metrics must be enabled at the metric definition. The template, association type, and included metric all must be enabled to assign the metric. If duplicates of a metric are found across the templates only one metric is assigned to the object.

Metric templates can be associated with a marketing object (campaign, campaign activity, event, and so on) or a custom set up. When a marketer creates a marketing object with a particular custom set up, the metrics available for that particular object will include the metrics included in the metric templates associated with that custom set up and those included in the metric templates associated with that particular marketing object type.

Example

Let us assume that a marketer is creating a campaign 'live it up' with the custom setup 'ABC'. Prior to creating this campaign, you created a metric template 'AA' with metrics A1, A2, and A3, and associated it with the custom setup 'ABC'. You had also created another template 'BB' with metrics B1, B2, and B3, and associated it with the marketing object of type 'Campaign'. The campaign 'live it up' will include the metrics A1, A2, and A3 from metrics template 'AA', which is associated with the custom setup 'ABC', and B1, B2, and B3 from the metrics template 'BB', which is associated with the marketing object of type 'Campaign'.

Implementing Metrics

A number of commonly used metrics are seeded with the product and enabled at time of deployment. If implementing additional metrics, defined specifically for your organization, as the Marketing Administrator you must create and set up these up. The procedures in this section will demonstrate how to accomplish that.

Process Flow for Creating Metrics

Metric creation will depend on the marketing object being measured. When creating a new metric for a marketing object, a calculation method must be selected. The calculation method indicates how a metric receives input values. For example, if the calculation method "values roll up from lower level" is selected, the metric values will roll up from a lower level marketing object.

When creating a new Metric, it can be simple or very complicated, depending on the aspect of the marketing object being measured. Regardless of the complexity, the process flow for creating a metric remains constant. The general flow is shown below.

Process Flow Diagram: Creating Metrics

Setting Metric Profile Options

To maximize metric performance, set the profile **AMS : Batch Size** at **site** level**.** This profile takes an integer that represents the maximum number of records to save in a batch. This helps tune the performance of the metric refresh program. By setting this profile, when updates or inserts are performed, they are limited to the batch size. This prevents the rollback segment from becoming too big and saves any intermediate processing. If the program fails then not all the work would be lost. The refresh would start from where it left off. The batch processing is written to prevent committing any corrupt state.

Implementing Summary Metrics

Summary metrics enable values to be calculated vertically in the hierarchy. Values are totalled at the marketing object level. Summary metrics may have subordinate metrics of any type (summary, manual, or function). Summary metrics should be created to total the manual metrics at that marketing object level.

Summary Metrics are assigned automatically to the marketing object when any subordinate metric is assigned.

For example, you can create a summary metric called "Total Cost" that is used with any object type. Then create other cost metric for campaign activities, such as "Venue Costs", "Postage Costs", and so on, all of which summarize to "Total Cost". When assigning "Venue Costs" and "Postage Costs" to a campaign activity, Total Cost will add these values together to give a summary value.

Summary metrics can be rolled up at same level but are not permitted to be rolled up to parent level.

Navigation: Administration > Marketing > Initiatives Setup > Metrics > Create

Notes

- **Calculation Type region:** To simplify the process of choosing a "used with" object, select a calculation type up front. Select Summarize as the Calculation type. The "used with" object is automatically populated with "*Any*".

- **Display Type:** Display type drives how the metric values are displayed in the UI. Select either integer, percent, or currency.

- **Aggregation Type:** The aggregation type drives the method that calculates the summary metric. It can be calculated by *summarization* or by *average*. When using summarization, all child values are totalled. When using average, instead of creating a total, an average is created.

- **Accrual region:** Applies to manual and function metrics only. Therefore, this region is disabled.

- **Summarize To region:** Select Summarize at Same Level. This is an optional selection. If this option is selected, the value of the metric being created is summarized to this metric. However, both metrics will always be attached to the same marketing object.

- **Rollup to Parent:** Use this option only when using *manual*, *rollup*, or *calculate using PL/SQL* metric.

Implementing Rollup Metrics

A rollup metric receives its values from lower level marketing objects. A rollup metric must have the same category as all of its child metrics.

Manual and Function Metrics are assigned to a Rollup Metric, therefore results can be propagated to parent marketing objects. Rollup Metrics may be assigned to themselves so that any hierarchical marketing object structure will collect all values from subordinate objects. Values cannot be entered. All values are totaled from the child level. Rollup Metrics always have a Used With field value of Any.

For example, you may want to establish a venue cost at the Event Schedule level. To view venue costs across multiple Event Schedules, a rollup metric called "Rolled-up Venue cost" can be created for the "Venue cost" manual metric. The rollup metric will appear at the Event and program levels totaling all 'Venue Costs' from the Event Schedules.

Navigation: Administration > Marketing > General > Metric > Create

Notes

- **Calculation type:** Select Rollup
- To have the rollup metric continue to rollup the marketing object hierarchy, set the " Summarize to: of the parent" to this same rollup metric.

  > **Note:** To have a rollup metric recursively rollup to itself, you will need to create the rollup with "of the parent" blank then update the rollup metric with this field assigned to itself. During creation of the rollup metric it does not have an entry in the database and the LOV will not show this as an entry.

- Set "Summarize to: at the same level" to the desired summary metric to total at the same object level.

Implementing Manual Metrics

A manual metric receives values from user input. Manual metrics are entered by hand into the system.

For example, an Oracle Marketing Administrator can create a manual metric for the Campaign Activity object called "Venue Cost". This enables a marketer who is using the application to manually enter costs associated with Venues.

- Each manual metric can be assigned to an object multiple times. A transaction date and description distinguishes each entry.
- Each metric is optionally assigned a summary metric, which totals values within the same marketing object. When the manual metric is assigned to the object, the summary metric is also assigned. The summary metric must have the same category, display type, and aggregation type as all its child metrics.
- Each metric is optionally assigned a Rollup Metric, which totals value at the parent business object. When the values of a marketing object are refreshed the rollup metric is either created at the parent level, or if the appropriate rollup metric exists, a link is made so the rollup can determine which values to total. The Rollup Metric must have the same category, display type, and aggregation type as all its child metrics.

A manual metric receives values from user input. Manual metrics are entered by hand into the system.

For example, an Oracle Marketing Administrator can create a manual metric for the Campaign Activity object called "Venue Cost". This enables a marketer who is using the application to manually enter costs associated with Venues.

Navigation: Administration > Marketing > Initiatives Setup > Metrics > Create

Notes

- **Enabled:** Select this check box to make it available for association with marketing objects.

- **Enter Values Manually:** Retain the default setting.

- **Used With:** Select the marketing object that will use this metric.

- **Summarize To section:** Select a Parent level/and or Same Level metric. This step is optional and only is performed if the function metric created will be Rolled up to a parent or Summarized at same level.

Implementing PL/SQL Programs for Metrics

PL/SQL Program Metrics enables the Metrics Refresh Engine to interface with database stored procedures and functions. This allows for the implementation of customized logic for calculating metric values based on business needs. Each time the Refresh Metric Engine is invoked, all PL/SQL Program metrics in the system are executed.

Two types of PL/SQL Program metrics are supported:

- Procedure: Procedure Metrics, based on database stored procedures, are executed once regardless of how many times it is used in the system. For example, seeded procedure metrics are used to calculate the number of leads generated from a campaign activity. Each lead generated is assigned a source code that references a marketing object. The number of leads for a campaign activity is determined by counting the number of leads with the same source code linked to the campaign activity.

- Function: Function Metrics, based on database stored functions, are executed once for each usage. For example, if 10 Campaigns use the Function Metric, the function is executed 10 times.

For performance purposes, use of Procedure Metrics is highly recommended over Function Metrics. As the data grows the overhead of function metrics grows proportionally. Execution of the function is proportional to the number of instances of the function metric attached to objects. Where as, procedure metrics are executed once per refresh no matter the size of data. The queries and other program logic are executed once to gather all the required data in bulk and then written in bulk to the activity metric table.

Implementing Procedure Metrics

Procedure Metrics are intended for enabling metric value calculations to be performed in a batch mode. Because Procedure Metrics are expected to update metric values for multiple Marketing objects, the database bulk update features are used.

To understand and implement Procedure Metrics see the following:

- Procedure Metric Overview, page 7-14
- Anatomy of a Procedure Metric, page 7-14
- Creating a Procedure Metric, page 7-15
- Sample Procedure Metric for Calculating Leads, page 7-16
- Calculation Logic, page 7-18
- Using Bulk Collect and Update for Procedure Metric Queries, page 7-20

Procedure Metric Overview

The first select statement represents when the procedure metric is called by the **AMS – Metric Refresh program** concurrent program. This select statement queries for all activity metrics system wide that are relevant to this operation. The query is not specific to any marketing object.

The second select statement (within "ELSIF p_arc_act_metric_used_by = 'CSCH' THEN") is for a specific object to update. In this case a campaign activity. The query adds to the where clause for the specific object from the input parameters.

The output of these queries includes a list of activity metric ids and corresponding actual values. Bulk Collect is used to maximize the processing of the query. These results are passed to 'UPDATE_ACTMETRICS_BULK' to do a bulk update of the activity metrics table. This update also includes setting the dirty flag of the parent activity metrics to be refreshed.

A check should be made to prevent updating the actual value if it has not changed. For example, if the number of leads for a campaign activity is 20 and on refresh the leads are calculated to be 20 again then do not update the activity metric. The list of activity metric ids and actual values should not include these items. If the activity metric is updated then the refresh engine will attempt to recalculate the rollup and summary metrics, thus wasting processing.

Anatomy of a Procedure Metric

A Procedure Metric must have the following parameters:

Procedure Metric Parameters

Parameter Name	Data Type	Default Value
p_arc_act_metric_used_by	VARCHAR2	Null

Parameter Name	Data Type	Default Value
P_act_metric_used_by_id	NUMBER	Null

Creating a Procedure Metric

This metric is executed once per refresh for each metric with the same procedure name. All values must be computed and saved in memory for a bulk update.

Procedure metrics are not supported for Cost or Revenue metrics. Once a cost metric has been posted to the budget the actual value cannot be updated. Currency conversions are expensive to process.

An API is used to perform the bulk update. Because of efficiency very little validation is performed.

Procedure Metric Sample

```
PROCEDURE run_metrics(p_arc_act_metric_used_by VARCHAR2 := NULL,
p_act_metric_used_by_id NUMBER := NULL)
IS
 l_actual_values_table num_table_type;
 l_activity_metric_id_table num_table_type;
BEGIN
 IF p_arc_act_metric_used_by IS NULL THEN
  SELECT NVL(actual_value, 0), activity_metric_id
  bulk collect INTO l_actual_values_table,
  l_activity_metric_id_table
  FROM some_table
 ELSIF p_arc_act_metric_used_by = 'CSCH' THEN
  SELECT NVL(actual_value, 0), activity_metric_id
  bulk collect INTO l_actual_values_table,
           l_activity_metric_id_table
  FROM some_table
  WHERE object_type = 'CSCH'
 END IF;
update_actmetrics_bulk(l_activity_metric_id_table,
          l_actual_values_table);
END;
```

See Sample Procedure Metric for Calculating Leads, page 7-16 for a detailed use of Procedure Metrics.

Navigation: Administration > Marketing > General > Metric > Create

Notes

- Calculation: Calculate Using Program.
- Procedure Name: SCHEMANAME.RUN_METRICS
- To test the metrics, specify the "used with" object as Campaign Activity. After the metric is created, assign it to a Campaign Activity. This procedure is executed when

either the refresh button is pressed or the concurrent metrics engine executes. Verify results with source tables.

Sample Procedure Metric for Calculating Leads

The following is a sample procedure Metric for Leads. This is an excerpt from package AMS_ACTMETRICS_SEED_PVT.

```
PROCEDURE Calculate_Seeded_Metrics(
          p_arc_act_metric_used_by VARCHAR2 := NULL,
          p_act_metric_used_by_id NUMBER := NULL)
IS
   l_actual_values_table Ams_Actmetrics_Seed_Pvt.num_table_type;
   l_activity_metric_id_table Ams_Actmetrics_Seed_Pvt.num_table_type;
BEGIN
   -- Get all object data to update.
   IF p_arc_act_metric_used_by IS NULL THEN
      SELECT NVL(actual_value, 0), activity_metric_id
      bulk collect
      INTO l_actual_values_table, l_activity_metric_id_table
      FROM
        (SELECT actual_value, activity_metric_id
        FROM(
           --R9 Campaign Schedule/Leads
           SELECT
           /*+ index(X AS_SALES_LEADS_N4)
               index(B ams_campaign_schedules_b_u1)
               index(ALB ams_metrics_all_b_n3)
               index(c ams_source_codes_u2)
               index(Y as_statuses_b_u1)
        index(AL AMS_ACT_METRICS_ALL_N5)*/
    COUNT(1) actual_value, AL.activity_metric_id,
                  AL.func_actual_value
           FROM ams_campaign_schedules_b  B, ams_source_codes  C,
                as_sales_leads X, as_statuses_b  Y,
                ams_act_metrics_all AL, ams_metrics_all_b ALB
           WHERE X.status_code = Y.status_code
           AND  B.schedule_id = C.source_code_for_id
           AND  C.arc_source_code_for = 'CSCH'
           AND  Y.lead_flag = 'Y'
           AND  Y.enabled_flag = 'Y'
           AND  B.source_code = C.source_code
           AND  X.source_promotion_id = C.source_code_id
           AND  NVL(X.DELETED_FLAG,'N') <> 'Y'
           AND  AL.arc_act_metric_used_by = 'CSCH'
           AND  AL.act_metric_used_by_id = B.schedule_id
           AND  AL.metric_id = ALB.metric_id
           AND  ALB.metric_category = 906 -- Leads
           AND  ALB.function_name
                = 'AMS_ACTMETRICS_SEED_PVT.CALCULATE_SEEDED_METRICS'
           AND  ALB.metric_calculation_type = 'FUNCTION'
      GROUP BY AL.activity_metric_id, AL.func_actual_value)
      WHERE NVL(actual_value,0) <> NVL(func_actual_value,-1)
    );
   ELSIF p_arc_act_metric_used_by = 'CSCH' THEN
      SELECT NVL(actual_value, 0), activity_metric_id
      bulk collect
      INTO l_actual_values_table, l_activity_metric_id_table
      FROM (
        SELECT actual_value, activity_metric_id
        FROM(
            --R9 Campaign Schedule/Leads
           SELECT
    /*+ index(X AS_SALES_LEADS_N4)
               index(B ams_campaign_schedules_b_u1)
               index(ALB ams_metrics_all_b_n3)
               index(C ams_source_codes_u2)
               index(Y as_statuses_b_u1)
        index(AL AMS_ACT_METRICS_ALL_N5)*/
```

```
COUNT(1) actual_value, AL.activity_metric_id,
                 AL.func_actual_value
           FROM ams_campaign_schedules_b  B, ams_source_codes  C,
                as_sales_leads X, as_statuses_b  Y,
                ams_act_metrics_all AL, ams_metrics_all_b ALB
           WHERE X.status_code = Y.status_code
           AND  B.schedule_id = C.source_code_for_id
           AND  C.arc_source_code_for = 'CSCH'
           AND  Y.lead_flag = 'Y'
           AND  Y.enabled_flag = 'Y'
           AND  B.source_code = C.source_code
           AND  X.source_promotion_id = C.source_code_id
           AND  NVL(X.DELETED_FLAG,'N') <> 'Y'
           AND  AL.arc_act_metric_used_by = 'CSCH'
           AND  AL.act_metric_used_by_id = B.schedule_id
           AND  AL.metric_id = ALB.metric_id
           AND  AL.ACT_METRIC_USED_BY_ID = p_act_metric_used_by_id
           AND  ALB.metric_category = 906 -- Leads
           AND  ALB.function_name =
                'AMS_ACTMETRICS_SEED_PVT.CALCULATE_SEEDED_METRICS'
           AND  ALB.metric_calculation_type = 'FUNCTION'
      GROUP BY AL.activity_metric_id, AL.func_actual_value
         )
      WHERE NVL(actual_value,0) <> NVL(func_actual_value,-1)
         );
   END IF;
   update_actmetrics_bulk(l_activity_metric_id_table,
                          l_actual_values_table);
END Calculate_Seeded_Metrics;
```

Local Variables

Two PL/SQL tables are needed to "bulk" capture the activity_metric_id and the calculated values corresponding to the ID's. The two tables should be of type num_table_type from the package ams_actmetrics_seed_pvt:

- l_values_tab Ams_Actmetrics_Seed_Pvt.num_table_type;
- l_ids_tab Ams_Actmetrics_Seed_Pvt.num_table_type;

Calculation Logic

The body of the procedure consists of code to select the values from a business-specific table. The business table needs to be able to join with a corresponding Marketing object table, such as Campaigns.

The activity metric table includes the id and object type of the corresponding object. For a campaign, the field arc_act_metric_used_by is 'CAMP' and act_metric_used_by_id is the campaign id.

Object Type

Object Type	Object Code	Table Column and Reference
Campaign	CAMP	AMS_CAMPAIGNS_ALL_B.CAMPAIGN_ID
Campaign Activity	CSCH	AMS_CAMPAIGN_SCHEDULES_B.SCHEDULE_ID
Event	EVEH	AMS_EVENT_HEADERS_ALL_B.EVENT_HEADER_ID
Event Schedule	EVEO	AMS_EVENT_OFFERS_ALL_B.EVENT_OFFER_ID
One-Off Event	EONE	AMS_EVENT_OFFERS_ALL_B.EVENT_OFFER_ID
Deliverable	DELV	AMS_DELIVERABLES_ALL_B.DELIVERABLE_ID
Dialog	DILG	AMS_DIALOGS_ALL_B.DIALOG_ID

Within the object the specific relevant metrics can be referenced by the metric_id. Thus to write the select statement the "where" clause includes

- WHERE Actmetric.Arc_act_metric_used_by = <object_code>
- AND actmetric.act_metric_used_by_id = <object_id>
- AND actmetric.metric_id = <metric_id>

Where the object_id is a join to the business table that references the marketing object. The metric_id needs to match the procedure metrics' id. To find the correct metric id query the metric table for the matching procedure name. For example:

- SELECT metric_id, metrics_name, arc_metric_used_for_object
- FROM ams_p_metrics_v
- WHERE FUNCTION_NAME = 'SCHEMANAME.RUN_METRICS' -- Use upper case.

Using Bulk Collect and Update for Procedure Metric Queries

Procedure metric queries must utilize 'BULK COLLECT' feature of PL/SQL to maximize performance. Bulk Collect minimizes the amount of context switching required by fetching values one at a time. Bulk Collect changes context to SQL to read in all values to PL/SQL arrays, which reduces context switching to once. After the data is fetched, the procedure must execute the bulk update procedure:

Ams_Actmetrics_Seed_Pvt.update_actmetrics_bulk (

```
l_activity_metric_ids_tab,
   l_actual_values_tab);
```

Implementing Function Metrics

Function metrics execute the PL/SQL function for each instance of the activity metric on the system. The return value of a number is the actual value for the activity metric to update.

To understand and implement Function Metrics see the following:

- Function Metric Overview, page 7-20
- Anatomy of a Function Metric, page 7-21
- Sample Activity Function Metric, page 7-21
- Creating a Function Metric, page 7-21

Function Metric Overview

The stored PL/SQL function or procedure name must be the full name which includes the schema name, package name, and module name (if applicable). Function metrics are similar to a manual metric leaf level metric, data values are entered, however, difference forecasted (marketing is expending) values vs. actual (what they actually spend).

A Function metric is executed once for each assigned metric to a marketing object. The parameter for the function is the activity metric id, which distinctly references the marketing object.

For the marketing object specification - use the following query parameters:

- Table: AMS_ACT_METRICS_ALL
- Object type: ARC_ACT_METRIC_USED_BY
- Object id: ACT_METRIC_USED_BY_ID

The function metric returns the actual value to be set. In the case of Cost and Revenue metrics the actual value must be in the 'Default Currency'. (Use Fnd_Profile.Value

('AMS_DEFAULT_CURR_CODE') to derive the default currency). For Costs, once the cost is posted to a budget the actual value cannot be updated.

Because function metrics are executed once per object and the value is updated one at a time, this method is very slow when processing thousands of metrics.

Anatomy of a Function Metric

The parameters include the activity metric id. Each execution of this function is for a single activity metric to retrieve the current actual value. The activity metric id is passed as the parameter. With this activity metric id the all the information about the activity metric can be accessed including the relevant object and current values. The actual value calculation may include counting a number of items, such as leads, or totaling values such as revenue.

Sample Activity Function Metric

The value returned is updated in the corresponding AMS_ACT_METRICS_ALL record. Currency conversion is performed for Cost and Revenue metrics.

```
FUNCTION run_metric(p_activity_metric_id IN NUMBER)
RETURNS NUMBER
IS
   L_actual_value NUMBER;
BEGIN
   -- Query actual value
   SELECT actual_value
   INTO l_actual_value
   FROM business, ams_act_metrics_all actmetric
   WHERE actmetric.activity_metric_id = p_activity_metric_id
   AND business.id = actmetric.act_metric_used_by_id;
   RETURN l_actual_value;
END;
```

Creating a Function Metric

Navigation: Administration > Marketing > General > Metric > Create

Notes

- **Calculation:** Calculate Using Program. Enter the schema, package, and function name.

- **Summarize To:** select a Parent level/and or Same Level object. This is optional and need only be performed if the function metric being created is to be Rolled up to a parent or Summarized at same level.

Implementing Variable Metrics

When creating a variable metric you are required to select a *multiplier metric*. A multiplier metric can be any manual or function metric with the same "Used With" object - is not a cost or revenue category.

The variable metric unit value can be entered by the user for forecast value. However, the actual unit value is calculated based on the actual value divided by the actual value of the multiplier metric.

When the variable metric is assigned to a marketing object the multiplier metric is also assigned (if not already present). When the metrics are refreshed the variable metric is updated.

For example, "postage costs" can be associated to a number of people in a target group (contacts). To contact them you have a mailer you sent out, and postage for this is.37/person. You have 500 people in the target contact group. The variable metric takes.37 and multiplies it by the # of people in your contact group.

Prerequisites: The multiplier metric must be defined before creating the variable metric

Navigation: Administration > Marketing > General > Metric > Create

Notes

- **Calculation:** Enter value manually
- **Accrual:** Set to Variable
- **Summarize To:** If required, set summarization to parent or same level, as needed.

Implementing Formula Metrics

You can create formula metrics from the administration area. Log in as the Administrator and create the formula metrics.

Navigation: Administration > Marketing > Initiatives Setup > Metrics > Create

Notes

- **Calculation Type region:** To simplify the process of choosing a "used with" object, select a calculation type up front. Select Summarize as the Calculation type. The "used with" object is automatically populated with "*Any*".
- **Display Type:** Display type drives how the metric values are displayed in the UI. Select either integer, percent, or currency.
- **Category:** Defaults to Cost. The Category determines the location of the formula metric within the end user interface. If a formula is associated with a Cost or Revenue category, then this formula is displayed within the Cost & Revenue side navigation menu. If the formula is associated with any other category (Response, Lead, Opportunity, and so on), then this formula is displayed within the Metric side navigation menu of the end user interface.
- **Used With:** This drop down box displays the object that the formula metrics is associated with. Metrics sources used for a formula should be within the same object type as the formula metrics. The objects with which users can associate the formula metrics include- campaigns, campaign activities, events, event schedules,

one-off events and deliverables. You can also select "Any" to associate the formula metric to any object type

> **Note:** The Create page is generic for all metric types and some options, such as Aggregation, may not be applicable for all metric calculation types. For example, aggregation does not apply to formula metrics although it does appear in the Create page.

- **Calculation:** Calculate Using Formula. This selection is required for formula metrics.
- In the Formula table enter the following details:
  - **Remove:** Use this check box to remove a line item from the formula definition.
  - **Source Type:** To indicate the type for the formual component. The options include, Category, Metric, Number, and Operator. Note: Six operators are supported: -, +, *, /, (, and).
  - **Source Name**: Use to select the source for metric or category source types.
  - **Sequence:** Use this field to reorder the sequence of entries in the formula. You cannot reuse existing numbers within a sequence order.
- **Update:** When you click this button, the formula is validated. If the formula is valid, the following message appears:
  - Formula is Valid.
  - Total Responses/Target Group Count

If the formula is not valid, the following message appears:

- Formula is Invalid
  - the formula is displayed with a "^ - Error – " that indicates the spot of the error

Associating Metrics to Marketing Objects

You can create metrics for any object that exists in the Oracle Marketing application. After the metric has been created by the Administrator, the marketer will use the metric in association with the Campaign object being measured.

For example, if a Manual Metric called "total cost" has been created for the Campaign Object, a marketer will simply navigate to the Campaign Details page and select Metric. The Manual Metric "total cost" will be available and will be associated to the Campaign Object by the marketer. For more details, see the *Oracle Marketing User Guide*.

Running the Metrics Concurrent Program

After implementing any type of metric, the concurrent manager for metrics must be set up. The Metrics Refresh Engine utilizes PL/SQL features to quickly, and correctly roll up values.

A check is made to see if any rollup metrics are missing. That is, a metric defined with a rollup parent, and the associated activity metric does not have a rollup parent.

- If so, the rollup is created and the activity metric is updated to point to the new rollup metric.
- Alternatively, if the rollup parent exists, the activity metric is update to point to the existing one.
- All activity metrics marked with a dirty flag (indicates values may not be correctly totaled) are read into memory.
- All parent activity metrics of the dirty metrics are also read into memory.
- Each node in the dirty tree is calculated from the leaf level up.
- Totals are kept in memory until the operation is completed.
- On completion, values are bulk updated into the activity metrics table and the dirty flag is reset.
- This process is broken into 2 parts: Rollups and Summaries.
- Update History is optionally performed as indicated by an input parameter.

The following steps are made in the refresh process:

Prerequisites: Metric is properly set up

Navigation: Applications > Functions > Setups > Concurrent Requests > Submit a New Request

Notes

- Concurrent Manager Program: AMS - Metrics refresh program.
- Schedule the program to execute at least once daily.
- Update History.
  - Metric history records the activity metric records on a daily basis. History is recorded by the AMS: Metric Refresh Program only when the Update_history flag is set to Yes.

- The refresh must be executed on a daily basis for the history to be recorded. If Update_History has been set to No, then no history will be recorded. The history is recorded for each metric as a single record for a given day. If the metric record is updated more than once in a day, only the last value of that day is recorded. If a metric is not updated on a given day then no history is recorded.

- The history can be shown by the history section on the Metrics and Cost & Revenue side navigation menus. Select the Metric Name, Start and End dates, Interval Value Type (cumulative or incremental), then select View History to show a table of values and charts. Recording history is required for support of Business Intelligence for Marketing (BIM).

Control Groups and Metrics

Control Groups help analyze campaign effectiveness. The post activity analysis report provides a detailed illustration of the selected metric for the Contact and Control Group members, and how it can leverage the campaign. Marketers can use the Control Group Analysis report to compare the behavior of the Contact and Control Groups. This in turn helps them arrive at definitive conclusions on the effectiveness of their marketing activities.

Contact Groups and Control Groups

From the Control Group report search page, marketers can drill down to the actual report with the values between the Contact and the Control Groups per Activity by clicking on the corresponding View Report icon. At an activity level, this report provides insight into the performance of the Control Group and Contact Group members.

Collecting Metrics History

Every metric line item in the metrics table contains a History icon. However, the Metric history column is not displayed by default in any of the seeded views. The user can personalize the seeded views to display the Metrics History icon. The Metric History icon is displayed for Rollup, Summary, Manual, Formula and Function metrics for both seeded and user-defined metrics.

The Metric History page displays only the actual values associated with the metric. Clicking on the history icon navigates the user to a new Metric History page. The following are the components of the metrics history page:

- Metric Search Section

- History Graph

- Table of Data
- Return to Link

Seeded Metrics Reference

A number of commonly used marketing metrics, such as Total Cost, Total Revenue, Responses Count and Event Registrants, are included in with the deployment of the Oracle Marketing application. The following is a listing of the metrics which are selectable for association to specific marketing activities/objects.

Seeded Metrics

Metric Name	Metric Id	Used With Object	Calculation Type	Category	Metric Parent Id	Summary Metric Id
Total Campaign Cost	1	Any	Summary	Cost	-	-
Total Campaign Direct Cost	2	Any	Summary	Cost	-	1
Rolled-up Campaign Deliverable Cost	3	Any	Rollup	Cost	3	2
Rolled-up Campaign Event Cost	4	Any	Rollup	Cost	4	2
Rolled-up Campaign Cost	5	Any	Rollup	Cost	5	57
Total Campaign Indirect Cost	6	Any	Summary	Cost	-	1

Total Campaign Revenue	7	Any	Summary	Revenue	-	-
Rolled-up Campaign Revenue	8	Any	Rollup	Revenue	8	62
Total Campaign Response	9	Any	Summary	Response	-	-
Campaign Response	10	Campaign	Manual	Response	11	64
Rolled-up Campaign Response	11	Any	Rollup	Response	11	64
Total Campaign Activity Cost	12	Any	Summary	Cost	-	-
Total Campaign Activity Direct Cost	13	Any	Summary	Cost	-	12
Rolled-up Campaign Activity Deliverable Cost	14	Any	Rollup	Cost	14	13
Rolled-up Campaign Activity Event Cost	15	Any	Rollup	Cost	15	13
Direct Cost	16	Campaign Activity	Manual	Cost	171	57

Total Campaign Activity Indirect Cost	17	Any	Summary	Cost	-	12
Total Campaign Activity Revenue	18	Any	Summary	Revenue	-	-
Revenue	19	Campaign Activity	Manual	Revenue	8	62
Total Campaign Activity Response	20	Any	Summary	Response	-	-
Response	21	Campaign Activity	Manual	Response	11	64
Total Event Cost	22	Any	Summary	Cost	-	-
Total Event Direct Cost	23	Any	Summary	Cost	-	22
Rolled-up Event Deliverable Cost	24	Any	Rollup	Cost	24	22
Rolled-up Event Campaign Cost	25	Any	Rollup	Cost	25	23
Rolled-up Event Cost	26	Any	Rollup	Cost	26	57
Total Event Indirect Cost	27	Any	Summary	Cost	-	22

Total Event Revenue	28	Any	Summary	Revenue	-	-
Rolled-up Event Revenue	29	Any	Rollup	Revenue	29	62
Total Event Response	30	Any	Summary	Response	-	-
Event Response	31	Event	Manual	Response	32	64
Rolled-up Event Response	32	Any	Rollup	Response	32	64
Total Event Schedule Cost	33	Any	Summary	Cost	-	-
Total Event Schedule Direct Cost	34	Any	Summary	Cost	-	33
Rolled-up Event Schedule Deliverable Cost	35	Any	Rollup	Cost	35	34
Rolled-up Event Schedule Campaign Cost	36	Any	Rollup	Cost	36	34
Direct Cost	37	Event Schedule	Manual	Cost	172	57
Total Event Schedule Indirect Cost	38	Any	Summary	Cost	-	33

Total Event Schedule Revenue	39	Any	Summary	Revenue	-	-
Revenue	40	Event Schedule	Manual	Revenue	29	62
Total Event Schedule Response	41	Any	Summary	Response	-	-
Response	42	Event Schedule	Manual	Response	32	64
Total Deliverable Cost	43	Any	Summary	Cost	-	-
Total Deliverable Direct Cost	44	Any	Summary	Cost	-	43
Creative Cost	45	Deliverable	Manual	Cost	-	57
Other Cost	46	Deliverable	Manual	Cost	-	57
Postage Cost	47	Deliverable	Manual	Cost	-	57
Total Deliverable Indirect Cost	48	Any	Summary	Cost	-	43
Total Deliverable Revenue	49	Any	Summary	Revenue	-	-
Revenue	50	Deliverable	Manual	Revenue	-	62
Total Deliverable Response	51	Any	Summary	Response	-	-

Response	52	Deliverable	Manual	Response	-	64
Other Cost	53	Campaign	Manual	Cost	5	57
Other Cost	54	Event	Manual	Cost	26	57
Allocation	55	Campaign	Allocation	Allocation	-	-
Total Cost	56	Any	Summary	Cost	-	-
Total Direct Cost	57	Any	Summary	Cost	-	56
Rolled-up Deliverable Cost	58	Any	Rollup	Cost	58	57
Rolled-up Event Program Cost	59	Any	Rollup	Cost	59	57
Rolled-up Cost	60	Any	Rollup	Cost	60	57
Total Indirect Cost	61	Any	Summary	Cost	-	56
Total Revenue	62	Any	Summary	Revenue		
Rolled-up Revenue	63	Any	Rollup	Revenue	63	62
Total Response	64	Any	Summary	Response	-	-
Rolled-up Response	65	Any	Rollup	Response	65	64
Campaign Response	66	Program	Manual	Response	65	64

Other Cost	67	Program	Manual	Cost	60	57
Allocation	68	Program	Allocation	Allocation	-	-
Total One-Off Event Cost	69	Any	Summary	Cost	-	-
Total One-Off Event Direct Cost	70	Any	Summary	Cost	-	69
Rolled-up One-Off Event Deliverable Cost	71	Any	Rollup	Cost	71	70
Rolled-up One-Off Event Campaign Cost	72	Any	Rollup	Cost	72	70
Direct Cost	73	One-Off Event	Manual	Cost	173	57
Total One-Off Event Indirect Cost	74	Any	Summary	Cost	-	69
Total One-Off Event Revenue	75	Any	Summary	Revenue	-	-
Revenue	76	One-Off Event	Manual	Revenue	174	62

Total One-Off Event Response	77	Any	Summary	Response	-	-
Response	78	One-Off Event	Manual	Response	175	64
Total Leads	81	Any	Summary	Leads	-	-
Rolled-up Campaign Leads	82	Any	Rollup	Leads	82	81
Leads	83	Campaign Activity	Function	Leads	82	81
Leads	84	Event Schedule	Function	Leads	86	81
Leads	85	One-Off Event	Function	Leads	87	81
Rolled-up Event Leads	86	Any	Rollup	Leads	86	81
Rolled-up One-Off Event Leads	87	Any	Rollup	Leads	87	81
Total Opportunit ies	91	Any	Summary	Opportunit ies	-	-
Rolled-up Campaign Opportunit ies	92	Any	Rollup	Opportunit ies	92	91
Opportunit ies	93	Campaign Activity	Function	Opportunit ies	92	91

Opportunities	94	Event Schedule	Function	Opportunities	96	91
Opportunities	95	One-Off Event	Function	Opportunities	97	91
Rolled-up Event Opportunities	96	Any	Rollup	Opportunities	96	91
Rolled-up One-Off Event Opportunities	97	Any	Rollup	Opportunities	97	91
Total Orders Amount	101	Any	Summary	Orders Amount		-
Rolled-up Campaign Orders Amount	102	Any	Rollup	Orders Amount	102	101
Orders Amount	103	Event Schedule	Function	Orders Amount	106	101
Orders Amount	104	One-Off Event	Function	Orders Amount	107	101
Orders Amount	105	Campaign Activity	Function	Orders Amount	102	101
Rolled-up Event Orders Amount	106	Any	Rollup	Orders Amount	106	101
Rolled-up One-Off Event Orders Amount	107	Any	Rollup	Orders Amount	107	101

Total Registrants	121	Any	Summary	Registrants	-	-
Rolled-up Event Registrants	122	Any	Rollup	Registrants	122	121
Registrants	123	Event Schedule	Function	Registrants	122	121
Registrants	124	One-Off Event	Function	Registrants	125	121
Rolled-up One-Off Event Registrants	125	Any	Rollup	Registrants	125	121
Total Attendees	131	Any	Summary	Attendees	-	-
Rolled-up Event Attendees	132	Any	Rollup	Attendees	132	131
Attendees	133	Event Schedule	Function	Attendees	132	131
Attendees	134	One-Off Event	Function	Attendees	135	131
Rolled-up One-Off Event Attendees	135	Any	Rollup	Attendees	135	131
Total Cancellations	141	Any	Summary	Cancellations	-	-
Rolled-up Event Cancellations	142	Any	Rollup	Cancellations	142	141

Cancellations	143	Event Schedule	Function	Cancellations	142	141
Cancellations	144	One-Off Event	Function	Cancellations	145	141
Rolled-up One-Off Event Cancellations	145	Any	Rollup	Cancellations	145	141
Total Orders Count	151	Any	Summary	Orders Count	-	-
Rolled-up Campaign Orders Count	152	Any	Rollup	Orders Count	152	151
Rolled-up Event Orders Count	153	Any	Rollup	Orders Count	153	151
Rolled-up One-Off Event Orders Count	154	Any	Rollup	Orders Count	154	151
Orders Count	155	Campaign Activity	Function	Orders Count	152	151
Orders Count	156	Event Schedule	Function	Orders Count	153	151
Orders Count	157	One-Off Event	Function	Orders Count	154	151
Total Responses Count	161	Any	Summary	Response	-	-

Rolled-up Campaign Responses Count	162	Any	Rollup	Response	162	161
Rolled-up Event Responses Count	163	Any	Rollup	Response	163	161
Rolled-up One-Off Event Responses Count	164	Any	Rollup	Response	164	161
Responses Count	165	Campaign Activity	Function	Response	162	161
Responses Count	166	Event Schedule	Function	Response	163	161
Responses Count	167	One-Off Event	Function	Response	164	161
Rolled-up Campaign Direct Cost	171	Any	Rollup	Cost	171	57
Rolled-up Event Direct Cost	172	Any	Rollup	Cost	172	57
Rolled-up One-Off Event Direct Cost	173	Any	Rollup	Cost	173	57
Rolled-up One-Off Event Revenue	174	Any	Rollup	Revenue	174	62

Rolled-up One-Off Event Response	175	Any	Rollup	Response	175	64
Rolled-up Campaign Indirect Cost	176	Any	Rollup	Cost	176	17
Rolled-up Event Indirect Cost	177	Any	Rollup	Cost	177	38
Rolled-up One-Off Event Indirect Cost	178	Any	Rollup	Cost	178	74

8

Implementing and Administering Budgets

This chapter covers the following topics:

- Budgets Overview
- Implementing Budget Security
- Implementing Budget Categories
- Implementing Budget Approval Rules
- Implementing Business Units for Budgets
- Implementing Multiple Currencies for Budgets
- Understanding Budget Status
- Implementing Budget Requests
- Implementing Budget Reconciliations
- Implementing Budget Roll-up Views

Budgets Overview

Budgets are used in Oracle Marketing to supply funds for campaigns, events and other marketing objects. Approval rules determine the budget approval process and direct the approval workflow. Budget funds are released for marketing objects only after approvals are received. This is the start.

Budgets are notdivided by organization. However, they are stored with the organization ID according to the responsibility of the user who created the budget.

Implementing Budget Security

When a user creates a Budget it is created with:

- Responsibility ID of Budget creator

- Organization ID (Operating unit ID) of Budget creator.

You must create the Operating Unit ID from the Default Operating Unit profile that you created for the user. Creating this profile is mandatory. The Oracle Marketing Super User responsibility does not automatically have access to budgets.

For example, John is the owner of Budget A and does not have the "Oracle Marketing Super User" responsibility. User Mary has "Oracle Marketing Super User" responsibility and is a team member with edit metrics capabilities for budget A. The field "category" on the Budget is locked by locking rules. John cannot update this field even though he is the owner, while Mary can.

The table below explains the access security levels for Budgets.

Budget Security Levels

Security Level	User Name	Access Control
1	AMS: Admin Group	Updates all fields: • Excluding those locked by system • Including those locked by locking rules
2	Owner	Updates all fields: • Including Owner field • Including adding Team members • Excluding those locked by system • Excluding those locked by locking rules

Security Level	User Name	Access Control
3	Team members with Edit Metrics	Updates all fields: • Excluding Owner field • Including adding Team members • Excluding those locked by system • Excluding those locked by locking rules
4	Team members without Edit Metrics	View Budget only
5	Everyone else	No access, no view

Implementing Budget Categories

Budget Categories serve two purposes:

- Budget Classification: Configurable ways to classify a Budget. When classifications are used, Budgets can be divided into sales, marketing, or partnering purposes. For example, if a Budget classification for Partners exists, a category, "Partner Marketing Funds" can be created.

- Approval Rule Setups: These rules determine who gets to approve Budgets and under what conditions they can approve them. Approval rules can be either root Budget approval rules or Budget approval rules.

Navigation: Administration > Marketing > General > Category

Notes

- **Created For:** Budget

- **Enabled:** Select this check box to make the Category available

- **Prefix:** These are used as a prefix for the Budget numbers that are generated automatically.

- **Valid Activities:** This is optional. Activities defined here will be used to evaluate the Budget eligibility of Campaign Activities.

Implementing Budget Approval Rules

Approval rules determine which users can approve Budgets and under what circumstances their approvals are applied. Approval rules for Budgets can be configured using multiple parameters. For example, Budget approvals can be based on amount or approval organization.

Approval rules are evaluated based on the following hierarchy:

- Business Unit = 6
- Organization = 5
- Approval Object Type = 4
- Budget Category = 3
- Custom Setup = 1

The higher the number, the more important the parameter when determining which approval rule applies to which particular Budget.

Approval rules are contained in the package ams_approval_pvt and the file containing the code is amsvappb.pls.

Navigation: Administration > Marketing > Initiatives Setup > Approval Rules

Notes

- **Approval Rule For:** Name of person to whom the rule applies
- **Root Budget Request:** Select this if defining the rule for who gets to approve a Budget and under what circumstances
- **Budget Request:** Select this if defining the rule for who gets to approve a marketing objects' request for funding and under what circumstances
- **Organization:** Displays a list of operating units. Select the operating unit for which this approval rule will apply. The operating unit is created out of the default operating unit profile set up for a user.
- **Setup Type:** Custom setups created for Budgets purpose
- **Minimum Amount and Maximum Amount:** Define the range of Budget amounts or Budget request amounts that will fall into this approval rule
- **Approvers Section:** This table enables you to define the people who will be approving the Budget:
    - **Order:**

- **Type:** This can be Function (for customization purpose), Role (defined for marketing and assigned to Resources), or User (a user type)
- **User/Role:** Depending on the Type selected above, this may display a list of functions, roles or users
- **Start Date:** The date starting from which the approver is active. Within the range of the approval rule, each line can also have a start date and end date.
- **End Date:** The date when the approver stops being the approver.

Implementing Business Units for Budgets

When creating a Budget, the list of values for the Business Unit field comes from Organizations defined in Oracle HRMS. When defining any internal organization in HRMS, you have the ability to classify the organization using "Type". One of the type options is "Business Unit". This Type serves mostly for classification purposes.

Navigation: Work Structures > Organization > Define

Notes

- **New:** This enables you to define a new organization or query for a particular organization.
- **Type:** Business Unit
- This organization will now appear in the list of values for Business Unit in Oracle Marketing Budgets.

Implementing Multiple Currencies for Budgets

Companies can create Budgets, as well as other marketing objects in multiple currencies. Marketing automatically does currency conversion based on the conversion rates defined in the profile **AMS: Default Currency.**

Users can transfer Budgets and request money from Budgets in any currency. It is not required that the Budgets sourcing these requests is in the same currency. When a request for money is made in one currency, the user will see the approval notification and money transfer in that same currency. Similarly when Budget Owner receives a request, the system will automatically convert the requested amount into the currency of the Budget. The Budget owner will then approve the amount in Budgets currency.

Although the system has a default currency, a user can specify a different default currency. To change the currency default for a user, the user must first exist in the system.

Navigation: Profile > System

Notes

- Log in to Oracle Forms with System Administrator responsibility
- Application: Oracle Marketing
- Profile block: Enter %JTF%PROFILE% and search for the profile
- After changing the default currency, log into Oracle Marketing as the user for whom you changed the default currency. Navigate to Profile > Personalization > Display Preferences and verify whether the currency preference is correct.

Understanding Budget Status

A Budget goes through the following main system statuses:

- Draft: Budget amounts are entered but not approved.
- Pending approval: Budget is being reviewed and needs approval before it becomes active.
- Active: The Budget is active and can be used to fund activities.

Approval rules are used to determine the route from Draft to Active. Approval rules are highly configurable and multiple can be created based on the Budget's characteristics.

Budget Statuses

Status	Description
Draft	Budgets in draft status can be updated at any time in any way. Draft status may be updated to Pending Approval or Cancelled. It can also be updated to Active directly in case the Budget owner is also the owner of the parent Budget, and the parent Budget is already Active.

Status	Description
Pending Approval	The Budget has been submitted for and is awaiting approval. After all approvers have responded positively, a Budget may become Active or On Hold. If approvers reject the Budget it will become Rejected.
On Hold	On Hold is an interim status that is used when Budget has already obtained approval, and is just not completely ready to be made active. At On Hold status, a user can then manually change it to Active or Closed.
Rejected	Budget approvers have rejected the Budget. From Rejected, the status can be manually changed back to Draft.
Active	A Budget that has been approved and is ready to fund various activities and promotions. From Active, the status can be changed to Closed and Cancelled.
Cancelled	Indicates the Budget has been aborted. From Cancelled, the status can only be changed to Archived.
Archived	The Budget can no longer be used. This cannot be changed to any other status.
Closed	From On Hold or Active, Budget status can be manually changed to Closed. It indicates that the Budget has ended and is no longer available to fund activities and Offers.

A Budget status changes once it has been updated. Approval rules determine who can change Budget status and under what conditions.

Implementing Budget Requests

To access Budget Request screen, the proper security access level for the users must be enabled. For more information see Implementing Budget Security, page 8-1

Additionally, you may need to define multiple Transfer Reasons to record the reasons for each request. To do so, extend the Lookup "AMS_TRANSFER_REASON".

Implementing Budget Reconciliations

Budget Reconciliation enables a marketer to return the previously committed, but un-utilized funds, by transferring them from the Committed column to the Available column ("Reconcile Un-Utilized") for marketing objects, such as Campaigns. This functionality should not be performed by all users. As such, this function needs security control.

Budget Reconciliation Security is based on:

- Custom Setups: Enables or disables the Reconcile button to exists on the Budget side navigation menu.

- Responsibility: User responsibility levels enables or disables access to the Budget side navigation menu (regardless of Custom Setup). This can be controlled by including or excluding a function during responsibility setup.

- Including or excluding the Responsibility for Reconcile:Whether a user's responsibility allows him to access the Reconcile button inside the Budget side navigation menu (regardless of the above function) can be controlled by including or excluding another function just for the Reconcile portion. This is controlled during responsibility setup.

- Offer Start and End Date: The Reconcile button will only appear if the Offer's end date has been reached and status is completed, or if Offer has no end date its status should be completed.

To enable Automated Reconciliation, run the concurrent programAMS-TM: Release Committed Budget Amount After Grace Period.

Implementing Budget Roll-up Views

Budget roll-up view is a way for each Budget to display the amount for itself and also the amount summed up from its children. The roll-up summed view is its own Budget amount + all descendent Budget amounts.

This features gives an organization a high level view of all Budget balances summed up to each level. Activities and usages can be viewed by drilling down into different numbers such as committed and utilized portions of the Budget. When drilled down from a Roll-up View, the details will show for the Budget itself and all of its child Budgets.

For example, a Budget called "California" has committed amounts of $10K. A Budget called "Oregon" has $20K. Their parent Budget "Western US" funds no other activities, its Roll-up View committed therefore = $30K.

To enable the Budget roll-up view, set the profile option AMS: Universal Currency profile option at site level. This stores the one currency which is used to convert to all other currencies. In addition, for each user, set the JTF_PROFILE_DEFAULT_CURRENCY. This view of the roll-up is specified by the user's preferred currency.

Notes

- Log in to Oracle Forms with System Administrator Responsibility and set the profile AMS: Universal Currency at the site level.
- For each user, set the JTF_PROFILE_DEFAULT_CURRENCY at user level. This determines what currency a user will see in the Budget Roll-up View.
- Log in to Oracle Marketing and navigate to the Budget tab.
- Select Roll-up View.
    - Self View will show all amounts for the Budget, whereas Roll-up View will show all amounts summed for the Budget itself and all Budgets underneath it.
    - The Roll-up View converts all Budgets to the profile currency as set up. Because the profile is set at user level, different users will see the Roll-up View accordingly.

9

Implementing and Administering Products and Offers

This chapter covers the following topics:

- Products Overview
- Offers Overview
- Setting System Profiles for Offers
- Creating and Verifying Lookups for Offers
- Running Concurrent Programs for Offers
- Troubleshooting

Products Overview

Implementing products helps marketers create, promote, and manage products. After you have properly implemented products, your end users can access products using the Campaign Dashboard or the Campaign tab. Products are usually associated with an offer, event, promotion, or deliverable. For more information on implementing and administering products, see Implementing Products, page 14-3 in Implementing and Administering Deliverables.

Offers Overview

Offers are generally associated with campaigns and campaign activities. When Trade Management is implemented, Oracle Marketing's offer functionality is enhanced to include claims that can be recorded against these offers.

Prerequisites: Advanced Pricing should have been implemented. The profile option MO: Default Operating Unit should be set at the user level.

For more information about Trade Management, see the *Oracle Trade Management Implementation Guide*.

Setting System Profiles for Offers

Based on your business requirements, set the following system profiles for Offers.

System Profiles for Offers

Option	Required	Level	Setting	Effect/Limitation
AMS: Relationship Type for Buying Group	Yes	Site	Any valid relationship type created in TCA	Used to establish a hierarchical group of customers in TCA. For example, if value is set to subsidiaries then all parties who share this relationship will be part of a buying group. These are used as qualification criteria for Offers.
AMS : Choose Date Qualifier Regions	Yes	Site	Show All Show Header Dates Show only Date Qualifiers	This profile is used in the Trade Deal Offer User Interface. Based on the setting, the user may either enter date qualifiers or Header Dates or both.
AMS : Default Bucket for discount rules	Yes	Site	Values from Advanced Pricing Lookup PRICING_GROUP_SEQUENCE	The value set here will be used as the default value for buckets in the discount rules.

Option	Required	Level	Setting	Effect/Limitation
AMS : Default Phase for Line level discounts	Yes	Site	Available values are derived from Event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Line.
AMS : Default Phase for Line Group level discounts	Yes	Site	Available values are derived from Event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Group of Lines.
AMS : Default Phase for Order level discounts	Yes	Site	Available values are derived from Event phase setup in Advanced Pricing	This value will be used as the default value for phase for all discount rules with a discount level of Order.
AMS : Default value for Print on Invoice Flag	Yes	Site	Yes/No	Used as a default for all discount rules.
AMS : Default value for Product Preference	Yes	Site	User Defined	Used as a default for all discount rules.
AMS : Default Offer Formula	Optional	Site	Available pricing formulas in Advanced Pricing	This option handles discount rules for product categories when the Unit of Measure is not specified.

Option	Required	Level	Setting	Effect/Limitation
AMS : Default Forecast UOM	Required	Site	Select from a defined UOM	This value is used to calculate the initial base sales for a Forecast. Users can override this default value on the Forecast page.
QP : Accrual UOM Class	Yes	Site	UOM Classes as set up in Inventory	Used by accrual Offers. All accrual units will fall under this UOM class (for example, frequent flyer miles).
QP : Item Validation Organization	Yes	Resp	Select from Inventory Organizations as set up in Inventory	Offers can be defined only for those Products which will be available in the specified organization. Required for all Offers. Prices may be defined only for those Products which will be available in the specified organization.

Option	Required	Level	Setting	Effect/Limitation
QP : Source System Code	Yes	Resp	Possible Source Systems that can define Offers	Offers created using this relationship are tagged with this system source code and will be used to determine update privileges of Offers within the pricing module.

Creating and Verifying Lookups for Offers

Use the following table when creating and verifying lookups for Offers:

Lookups for Offers

Key	Type	Values	Meanings
AMS_OFFER_ DEAL_ CUSTOMER_ TYPES	Extensible	Buyer Customer List Segment	Buyer Group Customer List Segment
AMS_ LUMPSUM_ DISTRIBUTION_ TYPE	System	% Amt Qty	Percent Amount Quantity
AMS_OFFER_ LUMPSUM_ PAYMENT	System	Accrue Check	Accrue Issue Check
AMS_OFFER_LUMP _CUST_ TYPES	System	Buyer Customer	Buyer Customer

Key	Type	Values	Meanings
AMS_OFFER_ STATUS	System	Active Closed Draft Rejected Closed Pending Pending_Active Archived Cancelled Completed Terminated Onhold	Active Closed Draft Budget Rejected Closed Pending Budget approval Pending Active Archived Cancelled Completed Terminated On hold
AMS_OFFER_ TYPE	System	OID Lumpsum Order Accrual Off_Invoice Deal Terms	Promotional Goods Lump sum Order value Accruals Off Invoice Trade Deal Terms Upgrade
AMS_QP_ ARITHMETIC _OPERATOR	System	% Amt Lumpsum Newprice	Percent Amount Lump sum New Price
AMS_QP_ VOLUME_ TYPE	System	Pricing_Attribute10 Pricing_Attribute12	Quantity Amount

Running Concurrent Programs for Offers

Run the following concurrent programs for offers:

- **AMS-TM: Adjust Backdated Offer**: This programs takes the new Offer terms and recalculates the parameters of the Offer retroactively to the start date.
- **AMS-TM: Refresh of Base Sales Materialized View:** This program takes data from Order Management and loads it into Oracle Marketing. It loads into the following materialized tables:
  - ams_base_sales_mv
  - ams_actual_sales_mv

Troubleshooting

I am unable to see any Products or Categories under the Products mid-tab in the Campaign Details page. Why?

It is likely that you did not implement the single product hierarchy model correctly. Review the implementation and check.

10

Implementing and Administering Web

This chapter covers the following topics:

- Web Overview
- Web Templates
- iStore Integration
- Custom Web Sites and Placements
- Understanding and Using Clickthrough URLs
- Troubleshooting

Web Overview

Implementing Web Marketing within Oracle Marketing enables marketers to place their campaigns online. It helps personalizing the campaigns and hosting them on web sites. Web Setup can be implemented with Oracle iStore or any other third-party affiliate Web storefront.

Before implementing Web, the following applications must be setup:

- Oracle iStore: This step is mandatory if Oracle Marketing is integrated with Oracle iStore. See the *Oracle iStore Implementation and Administration Guide* for details.

- Oracle iSupport: Implementing Oracle iSupport is optional. When implemented, the Oracle iSupport portal displays the Web content.

Web Templates

Web Templates are used to create customized Web sites within Oracle Marketing. You can create a Web Template for a Web Campaign activity using the Activity Template.

Navigation: Administration > Marketing > Initiatives Templates > Activity Templates

Notes

- **Associated With**: Associate the Web Template to an Activity.
- **Channel Category**: Select the Channel Category Web Marketing to create a template for Web.
- **Channel:** Select the Channel for which you wish to create a Web Template. Seeded Channels for Web are explained below.
- **Associated Activity Purposes:** Select the appropriate Activity Purpose for your Web Activity.

The following Web Channels are seeded for Oracle Marketing:

- Web Advertising: Used for both Web advertising and Web offers. The seeded stylesheet for advertising is called Web Ad. For a schedule of type Web advertisement and Web offer you can create new content types and stylesheets.
- Web Promotions: Used for product promotions on the Web.
- Web Dynamic Recommendation: The seeded stylesheet for Web Dynamic Recommendation is called Web Dynamic Recommendation Stylesheet. For a schedule of type Web dynamic recommendation you can't create new content types. However, you can create new Stylesheets.

  Unlike a Web advertisement or Web offer, when using Web dynamic recommendations the content rendered is not static therefore cannot be predefined. Recommendations are situational (based on pages browsed, user preference, etc.) therefore, content is dynamically selected. Web dynamic recommendations are only executed when iStore is implemented.

iStore Integration

Integrating Web marketing with Third-Party Web stores enables customers to create segments in Oracle Marketing. These segments can be re-used in rule-based posting conditions to personalize Web Ads. The Web Ads can be on sites such as the corporate Web site, or an employee portal built with Oracle Portal. This feature is also available even if the database storing the members of these sites are not in the TCA.

In Oracle Marketing iStore integration is used in online stores where sellers can organize and store customer information in their database.

Implementing Sites

To create a Web Marketing activity for iStore integration, you must first define a site for iStore. You can create the site in the Web Setup page on the Oracle Application.

Navigation: Administration > Marketing > Web Setup > Sites

Notes

- **Site Category:** Select the category to which you with to place iStore. In this case, select Oracle Applications since you wish to create a site specifically for iStore.
- **Site Name:** Enter iStore and click the Lookup icon to retrieve the application ID of iStore.
- **Programmatic Access name:** Enter the Programmatic Access Name that you create for the Web Site.

Implementing Pages

You can create pages for iStore here, in a manner similar to creating a Web Site. Select the Web Site for which you wish to create pages and enter specific information.

Navigation: Administration > Marketing > Web Setup > Pages

Implementing Placements

Placements are areas on particular Web pages that have been designated to show marketing content. A placement can only be selected once within an activity. Once the activity is approved and active (start date has passed, end date has not been reached) the activity automatically becomes part of the Web activities that can run on the specified placement (if auto-publish is enabled for that Placement.) If not, the Web site manager will have to go into the placement and explicitly publish the schedule.

Logical order for Web placement:

1. Placement is picked (exact or non-exact match is determined)
2. A Schedule within the placement is executed - if no schedule is selected, default content (if specified) is displayed
3. Content associated to schedule is rendered

To create a Web placement for iStore, login as a user that has the Oracle Administrator responsibility, and define parameters for the following:

- Placement
- Target
- Content

  Create Placement Region Notes

- **Name:** Provide a logical name for this placement. Because a single placement can be used by many different schedules, you may want to give it a placement specific name rather than a schedule specific name.

- **Status:** To make the placement available for execution, it must be **active**.

- **Selection Method:** Choose either random or ordered. When the Web schedule executes, this value determines if the placement is displayed randomly on the page, or if it is ordered on the page.

  - When **Ordered** is selected any Web schedule that subsequently chooses this placement will have the lowest schedule display priority in this placement. You will need to go into the Placement to manually change this priority if needed.

  - When **Random** is selected a schedule (assuming it is published) is randomly picked.

- **Auto-Publish:** Select this check box if you want new schedules to automatically publish to the Web placement after the schedule is approved. This assumes that the placement is already active.

  - If not selected, you will need to update the placement and explicitly select this for the new schedule (that picked this placement) to actually run in this placement.You can de-select the check box in the Publish column even if the schedule is already approved and running.

  - When publish is de-selected for a schedule, the schedule remains in the list of that placement and is not deleted. Other Placements defined for that Schedule are not affected.

Target Region Notes

- **Application:** Select to specify what is application is running the target Web site.

  - Oracle Marketing ships with seeded application values (*i*Store, *i*Support, Partners).

  - To add additional applications to the drop-down, you will need to add them as a third party application.

  - After adding the affiliate Web site, it will be available in the application drop-down.

- Application Seeded values:

  - *i*Store, *i*Support, Partner Portal

  - *i*Support Only

- **Site:** When implementing Web marketing with Oracle *i*Store, use this section to specify site level details for the placement. A site refers to a specialty store within the context of *i*Store. For more information see *Oracle iStore Implementation and Administration Guide.*

- **Section:** When implementing Web marketing with Oracle *i*Store, use this area to specify section level details for the placement. Within an *i*Store site, various sections exist. For example, for a given site (Vision USA) several sections could exist (Notebooks, PC, Desktops, etc.)

- **Page:** Specifies the page within the target Web site. This is dependent on the application and/or site specified. Seeded choices include *i*Store, *i*Support, Partner Portal.

- **Location:** Specified the location on the tab or page. *i*Support Only sites use the location left 1 and right 1.

  - Seeded values:

  - Top

  - Bottom

  - Left (1-7)

  - Middle (1-4)

  - Right (1-4)

  Content Region Notes

- **Content Type:** Using the search icon, select an OCM content type for this placement. Only Web marketing content types are displayed here. The content type determines what content is rendered by the placement.

  - For Web Ads and Web Offers you can create custom content types.

  - For Web Dynamic Recommendations the seeded content type must be used.

  - All Content Types for Web Schedules must use the seeded Content Type group.

  For more details on web content, see Custom Web Sites and Placements, page 10-6.

- **Stylesheet:** Select a default stylesheet for this placement. The following Stylesheets are seeded:

  - Universal Web Advertisement Stylesheet (used for Web ad and Web offer)

- Web Dynamic Recommendation Stylesheet (used for Web product recommendations)

- **Default Content:** Use this area to select default content items. In the event that a schedule is not selected, the content defined here is displayed. You can't create a default click-through destination for a default content item.

- **Default Stylesheet:** Use this area to select a default stylesheet for the default content.

Activities Region Notes

- **Display Priority:** Prioritizes the activities competing for this placement.

- **Owner:** Helps in searching activities belonging to one user during a tie.

- **Parent Campaign:** Helps in sorting activities based on the parent in case of a tie in the activities.

Note that the Activities view will be displayed only if you create Web Placements through the Campaign Workbench.

Custom Web Sites and Placements

You can create Web sites and Placements for the Sites other than *iStore* or *iSupport*. Select the Site Category Other Applications and create a Web Site and pages for this site. Subsequently perform the steps mentioned above to create placements for this customized Web Site.

Specifying Content Types for Web

Oracle Marketing integrates with Oracle Content Manager (OCM) to provide Web marketing content.

Content Type

For Web marketing, content is displayed by way of a placement. Placements can have multiple content types associated to it. A specific stylesheet is selected for each content type and associated to a placement. Web Marketing groups content types by Web schedule activities. This acts as a template for Web marketing schedules.

For more information about content types, see *Oracle Content Manager Implementation and Administration Guide.*

Seeded Content Types for Web Marketing

Oracle Marketing ships with two seeded Web marketing content types:

- Web Advertisement: Used for both Web ad and Web offer. The seeded stylesheet for Web is ad is called *Web Ad.* For a schedule of type Web advertisement and Web offer you can create new:

  - Content Types
  - Stylesheets

- Web Dynamic Recommendation: The seeded stylesheet for Web Dynamic Recommendation is called *Web Dynamic Recommendation Stylesheet.* For a schedule of type Web dynamic recommendation you can't create new content types. However, you can create new stylesheets.

Unlike a Web advertisement or Web offer, when using Web dynamic recommendations the content rendered is not static therefore cannot be predefined. Recommendations are situational (based on pages browsed, user preference, etc.) therefore, content is dynamically selected. Web dynamic recommendations are only executed when *i*Store is implemented.

Content Group for Web Marketing

Content groups are a collection of Content Types defined in the system. For example, a feature article, product information, or help file. Web Marketing content types are part of an overall content group.

The seeded content group for Web marketing is:

- Content Type Group for Web Marketing

The content types that are part of this group will appear in the content type drop-down in the Web planner midtab. Therefore, the user is able to create content items of this content type.

Content Items for Web Marketing

Content items refer to anything a browser can render. For example an image, text file, etc. With the exception of stylesheets, no content items are seeded. Content items should not be created for Web dynamic recommendations because they are dynamically selected and driven by the product recommendations setup through *i*Store.

Stylesheets used in Web Marketing

Content types are displayed using OCM stylesheets and are ultimately rendered on a placement. A placement can have multiple content types associated to it however, a specific stylesheet can be selected for each content type and associated to a placement. You can create your own style sheets and use with Web marketing. For more information see *Oracle Content Manager Implementation and Administration Guide*.

The seeded stylesheets for Web marketing are:

- Universal Web Advertisement Stylesheet
- Web Dynamic Recommendation Stylesheet

Understanding and Using Clickthrough URLs

Click-Through-Destinations (CTD) allow marketers to generate URLs in the application. This functionality enables a marketer to create a URL for content, while hiding the complexity of the URL. This simplifies the process of creating a URL because the marketer does not have to know all parameters.

When creating a CTD you need to select a specific "action" for it. For example, if creating a CTD for Web advertisement, the "action" for the click-though could be to "send the targeted user to a specific URL".

The following action for Clickthrough URLs are seeded with the product:

- Go to URL: Sends the user to the defined URL. The URL for this action must be preceded by HTTP:// or HTTPS://.

Implementing Scripting Clickthroughs

The following seeded steps are available for Scripting Clickthroughs:

1. While building the Click through URL, select the 'Go to Web Script' Action .

   The web script parameter LOV displays a list of scripts (activated survey campaign deployments).

2. Change the responsibility to Scripting Administrator.

3. Open the Script Author and the Script files.

4. Deploy the scripts provided out of the box. For example, Event Registration and Lead Creation scripts.

5. Create a Survey Campaign.

6. Create a cycle and deployment for the Survey Campaign.

7. Activate the deployment.

8. For the Event Registration script, ensure that the marketer selects an Event parameter while creating the CTD.

Implementing Store Clickthroughs

The following seeded steps are available for Store Clickthroughs.

1. Go to *i*Store shopping cart: Uses *i*Store deep linking functionality to directly forward the user to the shopping cart page. This action is available only if *i*Store is implemented.

2. Go to Product Details page in *i*Store: Uses deep linking to directly forward the user to a specific *i*Store product detail page. When using this functionality, AMS: Item Validation Organization setting must match the IBE: Item Validation Organization setting. These profiles must be set to the same Master Inventory Organization. If they do not match, Products in *i*Store are not visible in Oracle Marketing. This action is available only if *i*Store is implemented.

3. Go to Shopping Cart with Item: Uses deep linking to directly forward the user to the *i*Store shopping cart page. The shopping cart can contain an item that has previously been added. This action is available only if *i*Store is implemented.

4. Go to Section *i*Store: Uses deep linking to directly forward the user to a specific section within the *i*Store page hierarchy. This action is available only if *i*Store is implemented.

5. Go to *i*Store Registration Page: Uses deep linking to forward the user to the *i*Store registration page. This action is available only if *i*Store is implemented. If using this action when creating an e-mail CTD be sure to set the profile IBE: Default Specialty Store to the name of the store that you are directing the user to.

6. Go to Catalog/Minisite in *i*Store: Uses deep linking to route user to the home page of a specific specialty store. The home page for the user will vary on the preferences selected by that user. For example, if the user has not registered in the store, and has the responsibility of IBE_GUEST, the user will be forwarded to the generic home page. However, if the user has previously registered, and has the responsibility of IBE_CUSTOMER with a saved preference of "English", the user will be forwarded to the English home page for that storefront. This action is available only if *i*Store is implemented.

Implementing Content Clickthroughs

There are three ways of creating CTD URLs for Content:

- Email Content: A CTD can be created for a Campaign Activity of type "direct marketing - email". In this example, the CTD action is "Go To Web Script". After selecting this action, the user selects the associated Event (in the example, Event registration). Once the e-mail Campaign Activity becomes active, a targeted e-mail is sent to a group of customers and or prospects. When the targeted group receives the e-mail and clicks the embedded e-mail link he or she is redirected to a Web page for Event registration.

- Web Advertisement Content: For example, a Web advertisement can be placed on the homepage of a Web store using merchandising functionality. In this case, a Campaign Activity of type "Web Marketing - Advertisement" is used, and the associated click-through destination content is an image displayed on the homepage of the Web store. When a user visits the homepage of the Web store they will see the image, if they choose to click on the image, they will automatically be routed to the specified destination page.

- Web Promotion: For example, a Web Promotion can be placed on the home page of a Web store using the Web functionality. This Promotion can be associated with an image containing the CTD. The associated could be "Go to *i*Store Shopping Cart with an Item". Ultimately, the user visits the home page of the Web store, clicks the image and is routed to the shopping cart page of the Web storefront. The Promotion is applied at line level to the shopping cart total.

Implementing Custom Clickthroughs

A Marketer performs the following actions to implement custom clickthroughs:

1. Select a Campaign Activity: Campaign Activities can be of type E-mail, Web advertisement or Web Promotion. In this case, select a Web Activity.

2. Select Content Type. Content type must be selected either by using the Content side navigation menu for Web ads and Promotions or by using an email authoring tool.

3. Select Click-Through Action: For a specific content type, select a specific action.

4. Select Click-Through Parameters: Based on the action selected, a parameter automatically becomes available. For example, if the action selected is "go to URL", the available parameter will automatically be populated. In this example, the parameter is a textbox for the marketer to input a destination URL.

Enabling Encryption for Click-Through Destinations

Because the party_id is exposed in a URL, Oracle Marketing supports encryption for URLs. To implement this functionality use the following procedure:

- Set JTF_FM_LENCRYPT_DELIM to an appropriate delimiter from the list provided.

- Set JTF_FM_RENCRYPT_DELIM to an appropriate delimiter from the list provided.

- For JTF_FM_SECURITY_KEY leave to changeme.

Once the values for these profiles have been set you should not change them.

Troubleshooting

Use the following frequently asked questions to assist you when troubleshooting a CTD implementation.

What if the Scripting LOV does not bring any Scripts for 'Go To Web Script' Action?

Ensure that there are active survey deployments in the system, as specified in the steps mentioned above. Check the active deployments.

When I click on an e-mail "Click Thru Link" nothing happens, what am I doing wrong?

Verify that your merge fields in the Click-Through- Destination links are not set up incorrectly. If you have changed the query after creating the CTD, this could be causing the error. If you have changed query parameters, you will need to re-create the CTD. If you do not see customer_id and source_code (shown below) in your URL as merge fields that means you need to re-create the CTD.

http://ap045sun.us.oracle.com/OA_HTML/amstracking.jsp?wcid=13891&t=Y&amsp=<< **customer_id**>>&sccd={(**source_code**)}

When I change the Clickthrough, nothing happens. Why?

Make sure you have not changed these profile values:

- JTF_FM_LENCRYPT_DELIM,
- JTF_FM_RENCRYPT_DELIM and JTF_FM_SECURITY_KEY
- JTF_FM_LMERGE_DELIM
- JTF_FM_RMERGE_DELIM

When I select an existing Click Through hyperlink in Email Content and press the Web button in iFrame, I see a javascript prompt instead of the Click Through Destination Definition Page. Why?

Existing Click-Through-Destination in Email Content (iFrame) cannot be updated.

When I try to select a product under a section, I cannot see any Products, yet I can see them in *i*Store. Why?

Check with your *i*Store Administrator. The Products can be in a sub-section under the section you are trying to select. Also, validate that the following profiles are pointing to the same Inventory Organization:

- AMS : Item Validation Organization
- IBE : Item Validation Organization

When I open the*i*Store customer UI, navigate to a section in a speciality store, and click on a content item, the application throws an error.

Ensure that the end date specified for the IBE_CUSTOMER responsibility associated with the target *i*Store site is greater than the current date.

I cannot see all the Minisites after I have selected a Section/Product combination, why?

The Minisites LOV will show all the Minisites containing the Section and Product combination you have selected. If you want to see all the minisites, deselect the

Section/Section and Product you have selected.

I cannot see all the Sections after I have selected a product. Why?

The Sections LOV will show all the Sections containing the Product you have selected. If you want to see all the sections, deselect the Product you have selected.

My URL parameters are not being encrypted, why?

Verify the following profiles:

- JTF_FM_LENCRYPT_DELIM - must be set to an appropriate delimiter from the list provided.
- JTF_FM_RENCRYPT_DELIM - must be set to an appropriate delimiter from the list provided.
- JTF_FM_SECURITY_KEY - must be set to changeme.

I cannot see an Event on the Events LOV even though the Event is Active. Why?

Check the Registration End Date of the Event. The Event LOV shows only those Events which have the Registration End Data later or equal to the current date.

When I go to the Cover Letter Details screen, I do not see the iFrame editor to define the CTDs. Why?

Make sure that the profile "Self Service Accessibility Features" is set to No.

I don't see the actions "Go to item details" and "Go to Shopping cart" with an item in the actions drop down list. Why?

These actions will not be listed if you don't have any product associated with the schedule. Go to the Offering midtab and associate products to the schedule.

I don't see any products under the Product drop-down list. Why?

Go to Products section under the Offering midtab in the Schedule Details page and associate a product to the schedule. Also, make sure the products are Published on the Web.

For the action "Go to Shopping cart with an item" for a Web Promotion Schedule, I do not see any offer in the Offer drop down list. Why?

Go to the Offers section under the Offering midtab in the Schedule Details page and associate an offer to the schedule.

11

Implementing and Administering Direct Marketing Fulfillment

This chapter covers the following topics:

- Implementing Email, Print, and Fax Activities
- Creating Cover Letters
- Fulfillment Setup
- Understanding and Using Clickthrough URLs
- Creating Custom Renditions for Content

Implementing Email, Print, and Fax Activities

Email, print and fax activities in Campaigns use the Oracle Content Manager (OCM) to store the outbound cover letters. Each email, print and fax activity is associated with an outbound cover letter the outbound Cover letter fulfilled by the Marketing application upon Activity activation. Once the activity is active and starts fetching responses/leads, the Sales users can review this cover letter and effectively follow up their leads.

Creating Cover Letters

The cover letter represents the actual content where marketers communicate with their customers. Before you create a cover letter you need to create a query and a content type. The content type simply provides a structure or framework for a cover letter.

Fulfillment Setup

For Direct Marketing Fulfillment, Oracle Marketing collaborates with Oracle Content Manager (OCM), the content repository for Oracle Marketing, to leverage a central repository of marketing collateral for all content execution and collaboration, including Sales proposals. Most marketing activities use and deploy one or more content items.

You must have the appropriate permissions granted to your user in order to create content items in OCM folders. Before creating the OCM Directories you need to create a default directory by setting the OCM profile IBC: Default Home Folder. For more information, see the *Oracle Content Manager Implementation and Administration Guide*.

To integrate OCM and Oracle Marketing, use the following guidelines:

- Create OCM Directories. See the *Oracle Content Manager Implementation and Administration Guide* for specific procedures.
- Grant Directory Privileged to Users and Groups. See the *Oracle Content Manager Implementation and Administration Guide* for specific procedures.
- Setup Approvals. See the *Oracle Content Manager Implementation and Administration Guide* for specific procedures.

Creating and Managing Content Types

Oracle Marketing seeds a structure for cover letters. Being the administrator, you can modify the structure by defining different attributes for it. For example, you can modify the footer, header, images for the seeded content type.

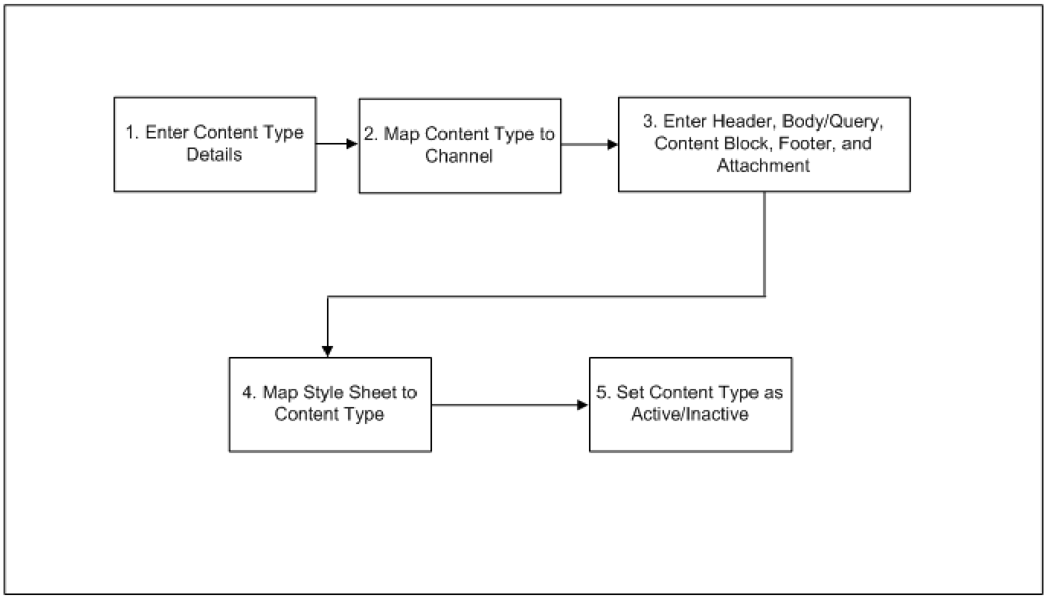
You can also map content types to specific channels. For example, you can map to email, fax, or print fulfillment channels. Based on the mapped templates, end users can search existing cover letters of the particular types you've enabled.

Content Types can be set as active or inactive. Inactive content types cannot be used for content item creation.

The following content types are seeded for cover letters:

- Basic Fulfillment Cover Letter: Contains body, content block, attachments. Does not contain headers or footers.
- Fulfillment Cover Letter: Has a complete structure. Contains headers, body, content block, footers, and attachments.
- Basic Fulfillment Email Cover Letter: Contains body, content block, attachments. Does not contain headers or footers. Used only for the email channel.
- Basic Fulfillment Fax Cover Letter: Contains body, content block, attachments. Does not contain headers or footers. Used only for the Fax channel.
- Basic Fulfillment Print Cover Letter: Contains body, content block, attachments. Does not contain headers or footers. Used only for the Print channel.

Administering Cover Letters Content Types -- Setup Flow



Notes

- **Status:** If the status is active, the content type is available for use in the cover letter. Otherwise, you will not be able to select it when creating the cover letter.

- **Content Group:** Using the provided check boxes**,** select the appropriate *channel* for this content type. For example, if the content type is created for Fax only, place a check in the Fax check box.

- **Display:** Using these check boxes, determine if the header must be parts of the structure of the content type. You can similarly indicate display option for content blocks, attachments, and footer blocks.

- **Header Block:** Optionally, select a default header block. The header block typically contains the company logo, and will be added to the main email body.

- **Header Image:** Optionally, select a default image for the header block. If using the header block for the company logo, you will select the image content here.

- **Query:** It is a required field for an active content type. Can create content types without Query when the status is inactive. Example, if this content item is for marketing emails, then you might select Marketing Simple Query.

- **Content Block:** To select the appropriate content block for this content type. Content blocks can be created in OCM or the Deliverables component within Oracle Marketing.

- **Footer Block:** Using the search icon, optionally select a default footer block. This can be any static non-personalizable content.

- **Footer Image:** Using the search icon, optionally select a default image for the footer block.
- **Attachments:** Using the search icon, you are able to see all file attachment items in OCM repository. You can select any of them to be the default, if needed.
- **Updatable:** For any of the content type attributes, if you want the ability to update the default when creating the actual cover letter, select Yes in this drop-down. Otherwise, select No.
- **Required:** For any of the content type attributes, if you want field to be a required field when creating the cover letter, select Yes in this drop-down. Otherwise, select No.

Creating and Managing Cover Letters

A Marketing Super User can create a new cover letter from the Fulfillment Setup section of Administration.

Navigation: Administrator > Marketing > Fulfillment Setup > Cover Letters

Notes

- **Content Group:** To select the appropriate channel for this cover letter. For example, if the cover letter is for fax, select fax as your channel. You can have a user associate an existing cover letter with email, print or fax. All cover letters retrieved are either in the Approved or In Progress status. However, a cover letter in the In Progress mode requires an approval to become active.
- **Content Types:** The content type provides a predefined structure for the cover letter.
- **Version:** Select either latest version or live version. Live version is the latest approved version of the cover letter. You cannot make a non-live version (latest, for example which is not live) available to your end users for using in the schedule context.
- **Location:** If the default value is not your desired location, you can change it by changing the profile IBC: Default Home Folder. For example, if the default is /COMMON you could change it to /AMS

When using the e-mail channel, it is likely that the cover letter will include a click-through destination. If you create your cover letters in Oracle One-to-One Fulfillment (not Oracle Marketing) your click-through actions are pulled from OCM. In this case, your actions are limited to:

- Go to URL

- Go to Content Item

Creating and Managing Fulfillment Queries

A fulfillment query is an SQL statement that collects data from the database. This data is merged into a template by using personalization tags defined by the query. The Query tags enable the template to dynamically fetch data. Query tags ultimately become SELECT statements that enable data to be retrieved from the database for the cover letter (template).

A query serves two purposes.

- Determines which records meet the defined criteria.
- Determines which fields of those records are returned. The returned data is merged with a template to create a customized e-mail for each recipient.

Seeded Campaign and Event Fulfillment Queries

For Campaigns and Events, Oracle Marketing ships with seeded queries that contain the related mail merge tags.

The following fulfillment queries for seeded for Campaigns:

- Marketing Simple Query: This query is designed to retrieve basic customer information from the AMS tables.
    - Query retrieves:title, first name, last name, pin code, party id, customer id, organization, e-mail, address, fax address, customer type, and source code.
    - Data is retrieved from the following tables: ams_list_entries, ams_act_lists, ams_campaign_schedules.
- Marketing Detailed Query: This query is designed to retrieve extensive customer information from the AMS tables.
    - Query retrieves: title, first name, last name, pin code, campaign source code, offer code, party id, customer id, list header id list id, address line1, address line2, city, state, zip code, country, fax address, phone, e-mail address, customer type.
    - Data is retrieved from the following tables: ams_list_entries, ams_act_lists, ams_campaign_schedules, ams_campaigns, ams_act_offers.

The following fulfillment queries are seeded for Events:

- Invitation
- Registration

- Venue Change
- Date Change
- Event Cancellation

Associating Seeded Fulfillment Queries with Templates

To associate a fulfillment query to a template, you can create a query for the template.

Navigation: Administration > Marketing > Fulfillment > Template

Notes

- **Query Type:** You can select Marketing Simple Query or Marketing Detail Query. If a custom Query has been created, it can be selected here.

Creating a Custom Fulfillment Query

If Oracle Marketing's seeded fulfillment queries do not meet your business requirements, you can create custom queries.

Prerequisites:AMS: Enable Fulfillment is set to **Yes**

Notes

- **SQL:** Add specific SQL statements to meet your custom query business requirements. When creating SQL statements for a custom Query it is required that you include the bind variables found in the Marketing Simple Query and Marketing Detail Query.

  An SQL Query can be modified but there should be only one bind variable as described below. All the joins to other tables should be derived from this bind variable. Note that there are different bind variables for different purposes. For example, schedule_id is a bind variable for campaigns; old_venue_id and event_ offer _id are the two bind variables for venue change.

  - Marketing Simple Query bind variables: schedule_id
  - Marketing Detailed Query bind variables: schedule_id

Note that the Query is not active until the status is Approved.

Managing Fulfillment

To manage fulfillment, you need to set up fulfillment profiles and set up the collateral content that goes into direct marketing fulfillment. To enable Oracle One-to-One Fulfillment, set **AMS: Enable Fulfillment** to **Yes** at site level. Without setting this profile, fulfillment activities will not execute for Campaigns or Events.

Marketing campaigns and events often require some collateral content sent to potential customers and event attendees. Collateral content is defined in Oracle Marketing as any electronic marketing material fulfilled to customers through an automated process. This type of content is always outbound and typically requires a cover letter.

Collateral content consists of:

- **Content Types:** Provides a framework or structure for the cover letter. This content type can be re-used for various types of cover letters.
- **Cover Letters:** Represents the actual content for the outbound activity. Contains various content blocks (defined by the content type). Also contains a body (defined by the query).
- **Queries:** SQL statements that collects data from the database - the retrieved data is merged into the cover letter using personalization tags (which are defined by the query).

Marketers can only view cover letters that they have access to. Therefore, they must be given appropriate cover letter folder privileges. Folder privileges are handled through Oracle Content Manager's folder security.

Oracle marketing also supports content types used for non direct marketing activities such as advertising and media relations. These content types belong to the content type group 'External Collateral'. The following channels are supported and can be optionally associated with outbound collateral content:

- Advertising
- In-Store
- Press and Analyst Relations

Note that channels falling under the above categories could be included as 'Media' in the OCM setup. Typically, these could be TV, or radio advertising spots stored as .wav files or media clippings. This setup is required since there is no native fulfillment support for these categories.

Understanding and Using Clickthrough URLs

To understand and use clickthrough URLs for Direct Marketing fulfillment, see the following sections:

- About Clickthrough URLs and Landing Pages, page 11-7
- Implementing Landing Page URLs, page 11-8

About Clickthrough URLs and Landing Pages

To enable click through tracking for direct mail print and fax activities, and for indirect marketing channels, such as advertisements, marketers can define and use Landing

Page URLs. A Landing Page URL serves as the response handling mechanism for the campaign activity it is associated with. Using inbound response tracking through Landing Page URLs, marketers can invite advertising schedule responses through Web channels. Typically, click through destination (CTD) URLs are cryptic and clumsy to handle. Landing Page URLs are short, and make it easy and simple for end users to remember and use them.

Implementing Landing Page URLs

Additional parameters provided by a Web visitor are concatenated with the specified Landing Page URL to arrive at a Complete Landing Page URL.

The following example demonstrates how the additional parameters may be used.

Example

The Landing Page URL "http://www.oracle.com/10gRegister" points to the 10G launch event registration page. A TV advertisement schedule and a newspaper advertisement (in the Chronicle) schedule both use this Landing Page URL to invite customers to register for the event.

The two schedules have additional URL parameters, say "TV" and "Chronicle" associated with them respectively, so that user clicks can be attributed to respective schedules.

During execution, when users enter "http://www.oracle.com/10gRegister" in a browser window, they may be asked where they heard about the promotion. Based on their responses, the additional URL parameter is added to the Landing Page URL as:

- http://www.oracle.com/10gRegister/TV, or
- http://www.oracle.com/10gRegister/Chronicle

These two URLs are the Complete Landing Page URLs. They are now unique and independent of each other, and are tracked as such, even though they both lead to the same destination.

To enable the Collateral midtab, through which the Landing Page URL definition functionality is enabled, update existing Custom Setups and schedule templates for print, fax, and indirect marketing channels, such as Advertising. A marketer will then be able to associate Landing Page URLs to existing schedules that do not have the Collateral midtab enabled.

Creating Custom Renditions for Content

This field is required when using the print channel. Print channels can be rendered with an extension PDF or RTF. Using the search icon, upload a PDF or an RTF file for this email content. The file will be stored as a rendition which can later be used in a Print Schedule. This file will not be sent as part of your email. You can embed the mail merge tags used by the query into the PDF document or the RTF document.

12

Setting Up Web ADI

This chapter covers the following topics:

- Web ADI overview
- Web ADI Layouts
- Prerequisites for Using Web ADI
- General Guidelines for Using Web ADI Layouts
- Seeded Layouts
- Security Requirements for Web ADI
- Implementing Web ADI Integration

Web ADI overview

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

When the marketing department of an organization needs to work with a large number of campaign activities that are part of a bigger marketing plan, marketers can use the spreadsheet interface provided by Web ADI. The worksheet provides a quick and simple means to create and update multiple campaign activities within and across campaigns. The campaign activity data can be exported into seeded Web ADI layouts, and can be easily accessed externally, for analysis.

Web ADI Layouts

A Web ADI layout is a combination of a spreadsheet interface consisting of a set of logically grouped columns, and the mapping of attributes from each of these columns to the appropriate column in the underlying data store; and the logic to create or update the data with the necessary validations.

As an administrator, you can customize Web ADI layouts for marketing use. You can also modify or delete Web ADI layouts.

Prerequisites for Using Web ADI

The following are the prerequisites for Web ADI:

- Client PC with Windows ME, Windows NT 4.0 (with Service Pack 3 or later), Windows 2000, Windows XP, or Windows 98 installed on it

- Internet Explorer 5.0 or greater installed on the client PC

- Microsoft Excel 97, 2000, 2003, or XP installed on the client PC. For Web ADI to work with Microsoft Excel XP/2003, you must change the macro settings for Excel XP/2003. To do so:

1. In Excel, go to Tools > Macro > Security > Trusted Sources.

2. Select the "Trust access to Visual Basic Project" option.

- To allow spreadsheets to be created on your desktop, change your intranet browser security settings as follows:

1. Navigate to Tools > Internet Options > Security > Custom Level.

2. Set the "Initialize and script ActiveX controls not marked as safe" option to "Prompt".

    Note: Web ADI is not certified on Mac operating system with Safari browser.

- Refer to the Web ADI documentation for more information.

- To export using Web ADI

    1. Navigate to Tools > Internet Options > Security > Trusted Sites > Sites

    2. Click the Add button to add the server name to the list of trusted sites

    3. Deselect the Require Server verification (https) for all the sites in this zone check box.

General Guidelines for Using Web ADI Layouts

Refer to the *Oracle Marketing User Guide* to know the general guidelines for using Web ADI layouts.

Seeded Layouts

Oracle Marketing ships with three seeded Web ADI layouts. These include:

- Activity Import

  Marketers can use this layout to create new schedules and import them into the Marketing application.

- Activity Update

  Marketers can use this layout for mass update of basic identifying activity attributes. Sample scenarios where this layout may be used:

  - The marketing manager needs to adjust the dates of the Campaign Activities for a specific Campaign for which the dates have changed
  - The marketing administrator needs to mass update the ownership of Campaign Activities when the current owner leaves the marketing department
  - The marketing administrator needs to change the parent campaign for a set of Campaign Activities
  - The marketing manager needs to cancel a set of Campaign Activities

- Schedule Media Planner

  Marketers can use this layout to create or update schedule metrics data.

  Important: Please do not modify or delete seeded Web ADI layouts.

Security Requirements for Web ADI

Web ADI security is based on the access permissions to the application that the logged in user has.

Marketing administrators with full access privileges can create and update activities and access all the activities data in the system.

For marketers and marketing managers, the following restrictions must be applied on the Web ADI layouts:

- Access to parent campaigns should be based on team access security restrictions
- Access to Oracle Content Manager (OCM) content and cover letters should be based on OCM security definitions. Refer to OCM documentation for more information.
- Marketers can update the metrics of an activity only if they have the edit metrics

privileges for the parent campaign (unless the user is the activity owner or a system administrator).

- When the Update process is invoked to process data from a spreadsheet saved earlier, logged in users can update only those activities to which they have access.
- For export of activities and media planner, you should set the macros security level to Medium in Microsoft Excel.

Implementing Web ADI Integration

For Oracle Marketing, the Web ADI worksheet provides a quick and simple means for marketers to create or update multiple Campaign Activities, within and across campaigns. Marketers can also save a Web ADI worksheet on their desktops and work with it off line.

To implement the Web ADI integration, see the following sections:

- Implementing Web ADI, page 12-4
- Imlementing Web ADI Responsibility, page 12-4
- Concurrent Programs for Web ADI Integration, page 12-5
- Creating Custom Layouts, page 12-5

Implementing Web ADI

Oracle Marketing ships with one seeded menu called "AMS Web ADI Related Functions" (AMS_ADI_ALL_FUNCTIONS). To enable Web ADI for Marketing, you must enable the Grant flag for the menu and place it in the custom menu for Marketing.

The "AMS Web ADI Related Functions" menu contains three functions:

- **Desktop Integrator - Define Layout:** Select this function to be able to define layouts
- **Marketing Schedule - Export Integrators:** Select this function to enable the basic schedule Update and Media Planner functionality
- **Marketing Schedule - Import Integrator:** Select this function to enable the Import functionality

All the above functions have the Grant flag disabled by default.

Implementing Web ADI Responsibility

All the functions (Web ADI Import and Export) necessary for marketers, marketing managers, and administrators to use Web ADI are added to the *Marketing Administrator* and *Marketing User* seeded responsibilities. They must be added when you create any custom responsibility too.

Concurrent Programs for Web ADI Integration

The following concurrent programs run in the background for Web ADI integration:

- **AMS: Schedules Import:** When the Import process is invoked.
- **AMS: Export and Update Schedule:** When the Update process is invoked.
- **AMS: Media Planner Loader:** When the Schedule Media Planner layout is used to map metrics data from the interface table to schedule metrics. If metrics already exist for the schedule, the metric values are updated. If the metrics do not exist, new metrics are created for the schedule.

Refer to *Oracle Marketing User Guide* for information on Web ADI processes.

Creating Custom Layouts

The three seeded Web ADI layouts contain a large number of columns, including the columns needed for basic campaign activity details, different schedule associations, and schedule metrics. For example, your organization may use only 5 metrics, which is a much smaller number to what is provided in the seeded layouts. In such a situation, you may customize the seeded layout by reducing the number of columns in it.

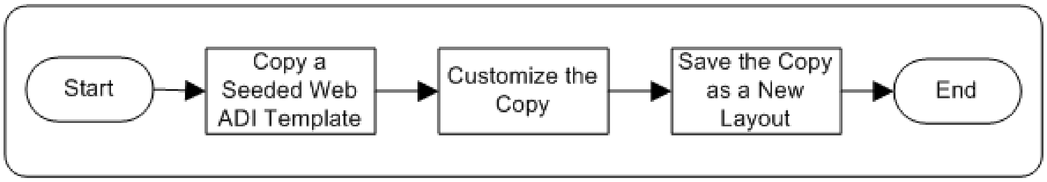
Some usage examples follow.

You may customize a Web ADI layout to create specific import layouts for specific schedule types, such as:

- Advertising Schedules Import Worksheet - may include basic schedule details, associations, a few metrics, and Web site response handling details.
- Web Advertising Schedules Import Worksheet - may include basic schedule details, associations, media planning details, and click through tracking URL definition for the Web content.
- Direct Marketing Schedules Import Worksheet - may include basic schedule details for direct marketing channels, collateral associations, and Web site response handling details.
- Metrics Import Worksheet - may include schedule Id, schedule name, and all the metric details and can be used by a marketer to upload metrics only.

The following figure depicts the flow for creating a customized Web ADI layout.

Process Flow for Customizing a Web ADI Layout



To create a customized Web ADI layout, you can do one of the following:

- Duplicate a seeded Web ADI layout, make the necessary changes to it, and save it as a new Marketing usage specific layout.
- Define a new layout based on a seeded layout (referred to as "Integrator").

Navigation: Campaign Dashboard > Administration > Define Layout

Notes

- Select from the three integrators available for Marketing:
  - Marketing - Schedules Import Integrator
  - Marketing - Schedules Update Integrator
  - Marketing - Schedules Media Planner
- **Placement:** To define the location of the field on the spreadsheet, you can choose from:
  - **Context:** Appears at the top of the spreadsheet as read only, contextual information. For example, for a layout definition specific for a channel, you may want to place the Channel field as read only contextual information.
  - **Header:** Fields whose values do not change for every record you are uploading. This region appears above the line region in the spreadsheet. For example, for a layout definition specific for a campaign, you may want to place the Campaign field information in the header region.
  - **Line:** Fields whose values change belong in the line region. This is data you add and modify. Most campaign activity related fields belong in the Line region, and will appear as rows in the spreadsheet.

    For the Required fields, the default Placement is Header. You may need to change them to Line, if they must appear in the spreadsheet rows.
- **Default Type:** To specify the nature of the default value, you can choose from:
  - **None:** Use when there no Default Value need be specified.

- **Constant:** Use when the text entered in the Default Value field must be displayed as the default value in the spreadsheet.
- **Environment:** Use to reference an environment variable when setting a default for a field. Examples of values for the Environment Default Type:

  sysdate: System date

  database: Name of current database

  oauser.id: The identification code of the user currently logged in to Oracle Applications
- **SQL:** Use to run a SQL statement to determine the default for the field. Web ADI will run the SQL statement entered in the Default Value field and automatically populate the spreadsheet with the result. If more than one value is returned from the query, the first value is used. Some tokens you can use in the SQL statement include:

  $profile$.profileName: Enter the name of the profile option, and its value for the current user's profile will be returned

  env.userid: Returns the current user ID

  env.appid: Returns the current application ID

  env.respid: Returns the current responsibility ID
- **Parameter:** Use to reference a parameter that your system administrator stores in the form function (Self Service Link) you use to access the Create Document flow.

- **Cancel:** To be redirected back to the Campaign Dashboard when Cancel is clicked, the profile BNE_REDIRECT_PORTAL must be set up to point to the Campaign Dashboard as follows:

  http://OA_HTML/OA.jsp?OAFunc=AMS_WB_CAMP_DASHBOARD

  > **Note:** Set the VO_MAX_FETCH_SIZE profile value to define the number of rows that must be downloaded for updates during the Export process. This value is typically set to 200.

The following table provides guidelines for including fields in custom layouts based on the Marketing - Schedules Import Integrator:

Recommendations for Custom Import Layouts

Field Name	Required?	Additional Fields to be Included	Remarks
Campaign	Yes	Campaign Id	Campaign Id must be included in all new layouts
Channel	Yes	Channel Id	Channel Id must be included in all new layouts
Coordinator	Yes	Coordinator Id	-
Schedule Name	Yes	NA	-
Template	Yes	NA	-
Currency	Yes	NA	The Currency field is needed to default metrics values
Timezone	Yes	NA	-
Launch On	Yes	NA	-
Launch Time	No	NA	-
End On	No	NA	-
End Time	No	NA	-
Source Code	No	NA	-
Country	No	Country Id	-
Marketing Medium	No	Marketing Medium Id	For some schedules, such as Advertising schedules, this is a mandatory field, and hence must be included

Field Name	Required?	Additional Fields to be Included	Remarks
Repeat Frequency	No	• Repeat Frequency UOM • Repeat For	-
Schedule Flexfields	No	NA	-
Channel Based Flexfields	No	Channel Based Flexfield Context	-
Product Category 1	No	• Product 1 • Product Category Id 1 • Product Id 1	-
Product Category 2	No	• Product 2 • Product Category Id 2 • Product Id 2	-
Product 1	No	• Product Category 1 • Product Category Id 1 • Product Id 1	-
Product 2	No	• Product Category 2 • Product Category Id 2 • Product Id 2	-

Field Name	Required?	Additional Fields to be Included	Remarks
Cover Letter	No	Cover Letter Id	-

Field Name	Required?	Additional Fields to be Included	Remarks
Any Web Planner field	No	• Web Planner - Application • Web Planner - Placement • Web Planner - Placement Id • Web Planner - Content Item • Web Planner - Content Item Id • CTD - Action • CTD - URL • CTD - Parameter 1 • CTD - Parameter 2 • CTD - Parameter 3 • CTD - Parameter Id 1 • CTD - Parameter Id 2 • CTD - Parameter Id 3 If you are using customizable Web scripts, then include the following fields: • CTD -	• Including the Web Planner - Title field is optional • Other than the Web Planner - Title field, either include all the Web Planner fields or none

Field Name	Required?	Additional Fields to be Included	Remarks
		Additional Parameter 1 • CTD - Additional Parameter 1 - Value • CTD - Additional Parameter 2 • CTD - Additional Parameter 2 - Value • CTD - Additional Parameter 3 • CTD - Additional Parameter 3 - Value • CTD - Additional Parameter 4 • CTD - Additional Parameter 4 - Value • CTD - Additional Parameter 5 • CTD - Additional Parameter 5- Value	

Field Name	Required?	Additional Fields to be Included	Remarks
Any Landing Page URL field	No	• Landing Page URL • Additional Parameter • CTD - Action • CTD - URL • CTD - Parameter 1 • CTD - Parameter 2 • CTD - Parameter 3 • CTD - Parameter Id 1 • CTD - Parameter Id 2 • CTD - Parameter Id 3 If you are using customizable Web scripts, then include the following fields: • CTD - Additional Parameter 1 • CTD - Additional Parameter 1 - Value • CTD -	-

Field Name	Required?	Additional Fields to be Included	Remarks
		Additional Parameter 2 • CTD - Additional Parameter 2 - Value • CTD - Additional Parameter 3 • CTD - Additional Parameter 3 - Value • CTD - Additional Parameter 4 • CTD - Additional Parameter 4 - Value • CTD - Additional Parameter 5 • CTD - Additional Parameter 5- Value	
Collaboration Content Item 1	No	Collaboration Content Item Id 1	-
Collaboration Content Item 2	No	Collaboration Content Item Id 2	-
Collaboration Content Item 3	No	Collaboration Content Item Id 3	-

Field Name	Required?	Additional Fields to be Included	Remarks
Metric 1 - Manual Fixed	No	Metric 1 - Manual Fixed Forecast	-
Metric 2 - Manual Fixed	No	Metric 2 - Manual Fixed Forecast	-
Metric 3 - Manual Fixed	No	Metric 3 - Manual Fixed Forecast	-
Metric 4 - Manual Fixed	No	Metric 4 - Manual Fixed Forecast	-
Metric 5 - Manual Fixed	No	Metric 5 - Manual Fixed Forecast	-
Metric 6 - Manual Fixed	No	Metric 6 - Manual Fixed Forecast	-
Metric 7 - Manual Fixed	No	Metric 7 - Manual Fixed Forecast	-
Metric 8 - Manual Fixed	No	Metric 8 - Manual Fixed Forecast	-
Metric 9 - Manual Fixed	No	Metric 9 - Manual Fixed Forecast	-
Metric 10 - Manual Fixed	No	Metric 10 - Manual Fixed Forecast	-
Metric 1 - Manual Variable	No	Metric 1 - Manual Variable Forecast Unit	-
Metric 2 - Manual Variable	No	Metric 2 - Manual Variable Forecast Unit	-
Metric 3 - Manual Variable	No	Metric 3 - Manual Variable Forecast Unit	-

Field Name	Required?	Additional Fields to be Included	Remarks
Metric 4 - Manual Variable	No	Metric 4 - Manual Variable Forecast Unit	-
Metric 5 - Manual Variable	No	Metric 5 - Manual Variable Forecast Unit	-
Metric 1 - Function Fixed	No	Metric 1 - Function Fixed Forecast	-
Metric 2 - Function Fixed	No	Metric 2 - Function Fixed Forecast	-
Metric 3 - Function Fixed	No	Metric 3 - Function Fixed Forecast	-
Metric 4 - Function Fixed	No	Metric 4 - Function Fixed Forecast	-
Metric 5 - Function Fixed	No	Metric 5 - Function Fixed Forecast	-
Metric 6 - Function Fixed	No	Metric 6 - Function Fixed Forecast	-
Metric 7- Function Fixed	No	Metric 7 - Function Fixed Forecast	-
Metric 8 - Function Fixed	No	Metric 8 - Function Fixed Forecast	-
Metric 9 - Function Fixed	No	Metric 9 - Function Fixed Forecast	-
Metric 10 - Function Fixed	No	Metric 10 - Function Fixed Forecast	-
Metric 1 - Function Variable	No	Metric 1 - Function Variable Forecast Unit	-

Field Name	Required?	Additional Fields to be Included	Remarks
Metric 2 - Function Variable	No	Metric 2 - Function Variable Forecast Unit	-
Metric 3 - Function Variable	No	Metric 3 - Function Variable Forecast Unit	-
Metric 4 - Function Variable	No	Metric 4 - Function Variable Forecast Unit	-
Metric 5 - Function Variable	No	Metric 5 - Function Variable Forecast Unit	-

The following table provides guidelines for including fields in custom layouts based on the Marketing - Schedules Update Integrator.

Recommendations for Custom Update Layouts

Field Name	Required?	Additional Fields to be Included	Remarks
Spreadsheet Reference	NA	NA	• A read-only field in the Header region that displays a system generated value • Value is passed to the concurrent program during the Update process
Schedule Name	Yes	• Schedule Id • Object version Number	-

Field Name	Required?	Additional Fields to be Included	Remarks
Campaign	No	Campaign Id	• A read-only field • If you include it in the layout and try to set it to Null, it will retain its previous value
Channel	No	Channel Id	• A read-only field • Include this field if you want to include the field Channel Based Flexfields
Coordinator	No	Coordinator Id	A read-only field
Template	No	NA	A read-only field
Timezone	No	NA	A read-only field
Launch On	No	NA	A read-only field
Launch Time	No	NA	A read-only field
End On	No	NA	A read-only field
End Time	No	NA	A read-only field
Source Code	No	NA	A read-only field
Country	No	Country Id	A read-only field
Marketing Medium	No	Marketing Medium Id	For some schedules, such as Advertising schedules, this is a mandatory field, and hence must be included
Objective	No	NA	A read-only field
Current Status	No	NA	A read-only field

Field Name	Required?	Additional Fields to be Included	Remarks
Update Status To	No	NA	-
Schedule Flexfields	No	NA	-
Channel Based Flexfields	No	• Channel • Channel Based Flexfield Context	-
Intent To Submit for Approval	No	NA	-

The following table provides guidelines for including fields in custom layouts based on the Marketing - Media Planner Integrator.

Recommendations for Custom Media Planner Layouts

Fields	Required?	Additional Fields to be Included	Remarks
Spreadsheet Reference	NA	NA	• A read-only field in the Header region that displays a system generated value • Value is passed to the concurrent program during the Update process
Schedule Name	Yes	• Schedule Id • Object version Number	-

Fields	Required?	Additional Fields to be Included	Remarks
Campaign	No	Campaign Id	• A read-only field • If you include it in the layout and try to set it to Null, it will retain its previous value
Channel	No	Channel Id	• A read-only field • Include this field if you want to include the field Channel Based Flexfields
Coordinator	No	Coordinator Id	A read-only field
Template	No	NA	A read-only field
Timezone	No	NA	A read-only field
Launch On	No	NA	A read-only field
Launch Time	No	NA	A read-only field
End On	No	NA	A read-only field
End Time	No	NA	A read-only field
Source Code	No	NA	A read-only field
Country	No	Country Id	A read-only field
Marketing Medium	No	Marketing Medium Id	For some schedules, such as Advertising schedules, this is a mandatory field, and hence must be included
Status	No	NA	A read-only field
Purpose	No	NA	A read-only field

Fields	Required?	Additional Fields to be Included	Remarks
Channel Based Flexfields	No	Channel Based Flexfield Context	• A read-only field • If you include this field, also include the field "Channel"
Primary Product Category	No	Primary Product	A read-only field
Primary Product	No	Primary Product Category	A read-only field
Metric 1 - Manual Fixed	No	• Metric 1 - Manual Fixed Forecast • Metric 1 - Manual Fixed Currency	-
Metric 2 - Manual Fixed	No	• Metric 2 - Manual Fixed Forecast • Metric 2 - Manual Fixed Currency	-
Metric 3 - Manual Fixed	No	• Metric 3 - Manual Fixed Forecast • Metric 3 - Manual Fixed Currency	-

Fields	Required?	Additional Fields to be Included	Remarks
Metric 4 - Manual Fixed	No	• Metric 4 - Manual Fixed Forecast • Metric 4 - Manual Fixed Currency	-
Metric 5 - Manual Fixed	No	• Metric 5 - Manual Fixed Forecast • Metric 5 - Manual Fixed Currency	-
Metric 6 - Manual Fixed	No	• Metric 6 - Manual Fixed Forecast • Metric 6 - Manual Fixed Currency	-
Metric 7 - Manual Fixed	No	• Metric 7 - Manual Fixed Forecast • Metric 7 - Manual Fixed Currency	-
Metric 8 - Manual Fixed	No	• Metric 8 - Manual Fixed Forecast • Metric 8 - Manual Fixed Currency	-

Fields	Required?	Additional Fields to be Included	Remarks
Metric 9 - Manual Fixed	No	• Metric 9 - Manual Fixed Forecast • Metric 9 - Manual Fixed Currency	-
Metric 10 - Manual Fixed	No	• Metric 10 - Manual Fixed Forecast • Metric 10 - Manual Fixed Currency	-
Metric 1 - Manual Variable	No	• Metric 1 - Manual Variable Forecast Unit • Metric 1 - Manual Variable Currency • Metric 1 - Manual Variable Actual	-

Fields	Required?	Additional Fields to be Included	Remarks
Metric 2 - Manual Variable	No	• Metric 2 - Manual Variable Forecast Unit • Metric 2 - Manual Variable Currency • Metric 2 - Manual Variable Actual	-
Metric 3 - Manual Variable	No	• Metric 3 - Manual Variable Forecast Unit • Metric 3 - Manual Variable Currency • Metric 3 - Manual Variable Actual	-
Metric 4 - Manual Variable	No	• Metric 4 - Manual Variable Forecast Unit • Metric 4 - Manual Variable Currency • Metric 4 - Manual Variable Actual	-

Fields	Required?	Additional Fields to be Included	Remarks
Metric 5 - Manual Variable	No	• Metric 5 - Manual Variable Forecast Unit • Metric 5 - Manual Variable Currency • Metric 5 - Manual Variable Actual	-
Metric 1 - Function Fixed	No	• Metric 1 - Function Fixed Forecast • Metric 1 - Function Fixed Currency	-
Metric 2 - Function Fixed	No	• Metric 2 - Function Fixed Forecast • Metric 2 - Function Fixed Currency	-
Metric 3 - Function Fixed	No	• Metric 3 - Function Fixed Forecast • Metric 3 - Function Fixed Currency	-

Fields	Required?	Additional Fields to be Included	Remarks
Metric 4 - Function Fixed	No	• Metric 4 - Function Fixed Forecast • Metric 4 - Function Fixed Currency	-
Metric 5 - Function Fixed	No	• Metric 5 - Function Fixed Forecast • Metric 5 - Function Fixed Currency	-
Metric 6 - Function Fixed	No	• Metric 6- Function Fixed Forecast • Metric 6 - Function Fixed Currency	-
Metric 7 - Function Fixed	No	• Metric 7- Function Fixed Forecast • Metric 7 - Function Fixed Currency	-
Metric 8 - Function Fixed	No	• Metric 8- Function Fixed Forecast • Metric 8 - Function Fixed Currency	-

Fields	Required?	Additional Fields to be Included	Remarks
Metric 9 - Function Fixed	No	• Metric 9- Function Fixed Forecast • Metric 9 - Function Fixed Currency	-
Metric 1 - Function Variable	No	• Metric 1 - Function Variable Forecast Unit • Metric 1 - Function Variable Currency	-
Metric 2 - Function Variable	No	• Metric 2 - Function Variable Forecast Unit • Metric 2 - Function Variable Currency	-
Metric 3 - Function Variable	No	• Metric 3 - Function Variable Forecast Unit • Metric 3 - Function Variable Currency	-

Fields	Required?	Additional Fields to be Included	Remarks
Metric 4 - Function Variable	No	• Metric 4 - Function Variable Forecast Unit • Metric 4 - Function Variable Currency	-
Metric 5 - Function Variable	No	• Metric 5 - Function Variable Forecast Unit • Metric 5 - Function Variable Currency	-

13

Implementing and Administering Events

This chapter covers the following topics:

- Events Overview
- Setting System Profile Options for Events
- Creating and Verifying Lookups for Events
- Running Concurrent Programs for Events
- Setting Up Vendors
- Setting Up Categories
- Setting Up Registration Scripts
- Implementing Event Fulfillment
- Integration with Programs

Events Overview

Events functionality in Oracle Marketing enables Event planning and execution. Event Schedules can be defined for various locations and times. To support rapid Event creation, definition, and maintenance, Events can be setup to define content, messaging, and planning information.

Consult the following sections to set up Events functionality:

- Setting System Profile Options for Events, page 13-2
- Creating and Verifying Lookups for Events, page 13-4
- Running Concurrent Programs for Events, page 13-10
- Setting Up Vendors, page 13-10
- Setting Up Categories, page 13-11

- Setting Up Registration Scripts, page 13-11
- Implementing Event Fulfillment, page 13-12

Setting System Profile Options for Events

Set the following profile options for Events:

Profile Options for Events

Option	Required	Level	Setting	Effect/Limitation
AMS : Auto Register for Events upon cancellation	Yes	Site	Yes/No	This is used to determine if the attendee can be moved from the waiting list to registered status if a spot is available
AMS : Copy Event Details to Event Schedules	Yes	Site	Yes/No	This is used to allow details of parent Event to be copied to the schedule
AMS : Prefix to Registration Confirmation Code	Optional	Site	User Defined	Characters for the Event Registration Confirmation Code.

Option	Required	Level	Setting	Effect/Limitation
AMS : HZ Dedupe Rule	Optional	Site	Yes/No	Indicates whether to use the TCA deduplication rules while performing Event registration. This applies only if you are importing list registrants using list import.
OS : Customer Access Privilege	Required	Resp	Full	Set this profile to Full in order to grant access to the Venue subtab.
OS : Bypass Group Validation	Required	Resp	Yes/No	Set this profile to Yes to grant access to the Venue subtab.
AMS : Enable Fulfillment	Optional	Site	Yes/No	Enables Oracle Marketing to be integrated with Oracle One-to-One Fulfillment.
AMS : Should Call to Inventory Modules be Made	Yes	Site	Yes/No	Indicates whether an Event may be created as an Oracle Inventory item. Set to Yes if wanting to store Events in inventory as " items".

Option	Required	Level	Setting	Effect/Limitation
AMS : Should Call to Pricing Modules be Made	Yes	Site	Yes/No	Indicates whether an Event may be priced.

Creating and Verifying Lookups for Events

Create or verify the following system lookups for Events.

Event Lookups

Key	Type	Values	Meanings
AMS_DELIVERY_MEDIA_TYPE	Extensible	I SEMINAR	I Seminar
		ON_SITE	On Site
		SEMINAR	Seminar
		WEB	Web

Key	Type	Values	Meanings
AMS_EVENT_STATUS	System	Active Archived Available Cancelled Closed Completed Denied_BA Denied_TA New On_Hold Submitted_ BA Submitted_TA Planning	Active Archived Available Cancelled Closed Completed Denied Budget Approval Denied Concept Approval New Active, but locked Pending Budget Approval Pending Concept Approval Planning
AMS_EVENT_AGENDA_ STATUS	System	Confirmed Unconfirmed	Confirmed Unconfirmed

Key	Type	Values	Meanings
AMS_EVENT_TYPE	Extensible	Briefing	Briefing
		Conference	Conference
		Exhibition	Exhibition
		Hospitality	Hospitality
		Internal_Event	Internal Event
		Launch	Launch
		Seminar	Seminar
		Speaking_ Engagement	Speaking Engagement
		Sponsorship_Event	Sponsorship
		Trade_Show	Trade Show
		Web_Seminar	Web Seminar
		Workshop	Workshop
AMS_ CONTACT_ POINT_TYPE	Extensible	Address	Address
		Email	Email
		Fax	Fax
		Inbound_ script	In bound Script
		Outbound_ script	Outbound Script
		Phone	Phone
		Website	Website
AMS_ MASTER_ OBJECT_ TYPE	System	Camp	Campaign
		CSCH	Campaign Activity
		EONE	One-Off Event
		EVEH	Event
AMS_ PRIORITY	System	Fast_Track	Fast Track
		High	High
		Standard	Standard

Key	Type	Values	Meanings
AMS_EVENT_SPEAKER_ STATUS	System	Booked	Booked
		Cancelled	Cancelled
		Confirmed	Confirmed
		Scheduled	Scheduled
AMS_EVENT_WAITLIST_ ACTION	System	First_Come_First	First Come First Served
AMS_EVENT_RESOURCE_ TYPE	System	AMS_People	People
AMS_EVENT_REG_STATUS	System	Cancelled	Cancelled
		Enrolled	Enrolled
		Registered	Registered
		Targeted	Targeted
		Waitlisted	Waitlisted
AMS_EVENT_REG_SOURCE	System	Call_Center	Call Center
		External	External
		On_Site	On Site
		Partner	Partner
		Web	Web
AMS_EVENT_REG_CANCEL_REASON	System	Agenda_Change	Agenda Change
		Cost	Cost
		Personal_Emergency	Personal Emergency
		Price_Change	Price Change
		Sch_Conflict	Scheduling Conflict
		Speaker_Change	Speaker Change
		Venue_Change	Venue Change
		Work_Emergency	Work Emergency

Key	Type	Values	Meanings
AMS_EVENT_PAYMENT_ STATUS	System	Comp Free Invoiced Paid Refunded	Complimentary Free Invoiced Paid Refunded
AMS_EVENT_LEVEL	System	Main Sub	Main Sub
AMS_EVENT_DAY	System	Five Four Three Two One	5 4 3 2 1
AMS_EVENT_CERT_ CREDIT_ TYPE	System	General Seed	General Seed
AMS_EVENT_CANCEL_ REASON	System	Disaster Insufficient_Reg Postponed Schedule_Conflict Speaker_ Unavailable Venue_Unavailable	Natural Disaster Insufficient Registration Postponed Schedule Conflict Speaker not available Venue not available

Key	Type	Values	Meanings
AMS_EVENT_ATTENDANCE_FAILURE	System	Agenda_Change	Agenda Change
		Disaster	Natural Disaster
		Personal_Emergency	Personal Emergency
		Schedule_Conflict	Schedule Conflict
		Speaker_Change	Speaker Change
		Venue_Change	Venue Change
		Work_Emergency	Work Emergency
AMS_EVEH_PURPOSE	User	Organization defined values	Purpose for the Event.
AMS_EVEO_OBJECTIVE	User	Organization defined values	Objective for the Event.
AMS_RATE_CODE	User	User defined entries	Rates for venues.
AMS_VENUE_RATING	User	Excellent	Excellent
		Good	Good
		Fair	Fair
		Poor	Poor
AMS_VENUE_TYPE	User	Convention_Center	Convention Center
		Hotel	Hotel
		Kiosk/Booth	Kiosk/Booth

Key	Type	Values	Meanings
AMS_EVEO_CONTENT_ACTIVITY	User	Cancelled Date_Change Reg_Cancel Reg_Confirm Reg_Waitlist Venue_Change	Event Cancellation Event Date/Time Change Registration Cancellation Registration Confirmation Wait List Confirmation Venue Change

Running Concurrent Programs for Events

For Events, run the program **Activate Event Schedules**. This program accomplishes two things:

1. **Activates Events:** Activates available event schedules and one-off events for which the start date has passed.

2. **Completes Events:** Picks up and completes event schedules and one-off events for which the end date has passed.

Setting Up Vendors

You can create a Vendor for Events by creating a venue for the Event, Event Schedule or One-off Event. When you create a venue, a record is created in TCA. A venue could be a hotel or a conference room offering services for an event to take place. In other words, the Venue is the Vendor. The venue location is stored as 'Party' details in the TCA, along with other details such as name and address of the venue.

In order to create venues, log in with the Oracle Marketing Super User responsibility.

Navigation:

- Event > Events > Venue > Create

- Event > Event Schedules > Venue > Create

- Event > One Off Events> Venue > Create

Notes

- **Rating:** You can rate the Venue based on its quality of service.
- **Planning Information:** These details would help you plan the event, in terms of budget and area.

Setting Up Categories

Categories are used with Events to group or categorize them. Examples of Event categories are educational Events or partnered Events.

Setting Up Registration Scripts

The Event registration script provides a scripted flow of interactions for customer self-service online registration. This script is used for registering marketing Events. For example, the Marketing Event "Oracle Open World" requires participants to register online. The registration text (questions that users fill out online) is part of a seeded script. This script supports registrations for free Events only.

Three seeded scripts are shipped for Event Registration:

- amserb2b.scr - B2B Event registration
- amserb2c.scr - B2C Event registration
- amserwca.scr - Event registration with customer authentication

Implement Event Registration Scripts from the Click-Through-Destination page for a campaign activity.

Prerequisites:

- A registrable Event is available.
- Scripts are deployed.
- Survey is deployed.
- Script and Survey is attached to a Campaign Activity.
- Oracle One-to-One Fulfillment is implemented.

Notes

- **Event:** Selecting an event is required for Event Registration scripts. If you do not select an Event object from the LOV, the Event Registration Script will fail.

Implementing Event Fulfillment

When creating templates for Events, you must set up fulfillment rules. These rules are created to link objects and actions to cover letters. When creating fulfillment rules, it is important to note that Event letters can only use events tokens.

For events the following actions are seeded:

- Event Cancellation: Send letters to Event roster when an Event is cancelled.
- Event Date Change: Send letters to Event roster when the date of the Event is changed.
- Invitation: Send letters to Event roster for Event invitations.
- Registration Cancellation: Send a letter on Event registration cancellation.
- Registration Confirmation: Send a letter on Event enrollment or registration
- Venue Change: Send letters to Event roster when the venue for the Event is changed. Letters will not be sent if a venue is removed from the Event.
- Wait List Confirmation: Send a letter when the registration status changes from wait list to confirmed.

Navigation: Administration > Marketing > Fulfillment Setup > Event Communications

Notes

- **Cover Letter:** Cover letters available are those created in Oracle Fulfillment.

Integration with Programs

In Events you can create individual Programs that form a part of an Event. Each program has a parent program you can associate child programs to. Marketing Managers can view their team's programs from the Program Details page. You can create a Program, and attach a Business Unit and purpose to it.

For more information on creating Programs, see the *Oracle Marketing User Guide*.

14

Implementing and Administering Deliverables

This chapter covers the following topics:

- Deliverables Overview
- Setting System Profile Options for Deliverables
- Creating and Verifying Lookups for Deliverables
- Implementing Products
- Administering Products
- Implementing Price Lists

Deliverables Overview

Deliverables are hard or soft, electronic collateral transmitted to a customer, prospect or an Event registrant. Deliverables may also be defined and collected into a kit. You can add other deliverables to the kit. Both Campaigns and Events use Deliverables. Deliverables are integrated into Oracle Inventory. When a Deliverable is created as an inventory item, it is created as a collateral. These collateral items are available to Oracle Telesales. Physical Deliverables created as inventory items may be priced using Oracle Pricing in Oracle Marketing.

Setting System Profile Options for Deliverables

Set the following profile options for Deliverables:

Profile Options for Deliverables

Option	Required	Level	Setting	Effect/Limitation
AMS: Item Validation Master Organization	Yes	Site	A valid Master Inventory Organization	When a Deliverable is flagged as an inventory item, it is created in Inventory under the specified master organization.
AMS: Should Call to Inventory Modules be Made	Yes	Site	Yes/No	Indicates whether a Deliverable may be created as an Oracle Inventory item.
AMS: Should Call to Pricing Modules be Made	Yes	Site	Yes/No	Indicates whether a Deliverable may be priced.

Creating and Verifying Lookups for Deliverables

See the table below for lookups, types, values and meanings.

Lookups for Deliverables

Key	Type	Values	Meanings
AMS_DELIV_STATUS	User	Archived Available Cancelled Denied_BA New Submitted_BA Superseded Expired Denied_TA Budget_Appr Submitted_TA	Archived Available Cancelled Denied - Budget Approval New Submitted - Budget Approval Superseded Expired Denied - Concept Approval Budget Approved Submitted - Concept Approval
AMS_EVENT_FULFILL_ON	System	On_Cancel On_Enroll On_Reg	On Cancellation On Enrollment On Registration
AMS_CAMP_FULFILL_ON	System	On_Invite	On Invite
AMS_OBJECT_USAGE_TYPE	System	Created Used_By	Created Used By

Implementing Products

Implementing products for marketing purposes provides marketer's the ability to create, promote, and manage products. After you have properly implemented products, your end users can access products using the Campaign Workbench or the Campaign tab. For the purpose of marketing, products are usually associated with an offer, event, promotion, or deliverable.

Oracle Marketing requires that the following applications are properly implemented:

- Implementing Oracle Product Hub, page 14-4
- Implementing Oracle Inventory for Marketing Products, page 14-7

Implementing Oracle Product Hub

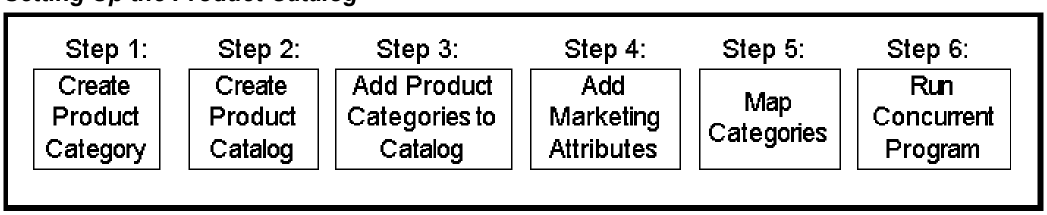
Oracle Marketing uses Oracle Product Hub for product cataloging and management. The concept of using a single product hierarchy model provides an efficient and re-usable catalog and product management system.

Using catalog categories you build a structured hierarchy that contains characteristics (such as attributes and functions). These characteristics are inherited throughout the hierarchy.

For example, you can create a catalog category *phone.* This category can have children *mobile phone* and *land line* categories. Children of the parent *phone* will inherit all characteristics defined for *phone*.

Note: Interest Types, primary and secondary codes are no longer used for product categorization.

Setting Up the Product Catalog



Perform the following steps to set up the product catalog.

Step 1: Create Product Catalog

A catalog is a collection of categories that are setup in a hierarchical format. When building your product catalog (and associated hierarchy), the first thing to do is create the catalog structure.

To create the catalog, login to Self Service as a user that has the Catalog Manager responsibility.

Navigation: Setup > Catalogs

Notes

- **Controlled at:** Select if you want the product catalog to be associated at the item or organization level.
- Select the following:

- Enable Hierarchy for Categories
- Enforce a List of Valid Categories

Step 2: Create Product Categories

To create Product Categories, login to Self Service as a user that has the Catalog Manager responsibility.

Prerequisites: Add the following responsibilities to your user:

- Catalog Responsibility: Enables you to access the PLM UI also enables you to execute the Load Catalog Hierarchy concurrent program.
- Inventory responsibility: Enables you to access the Oracle Inventory UI and allows you to see the default category set UI.

Navigation: Setup > Categories

Notes

- **Flex Structure:** Select Sales Categories and fill in mandatory fields.

Step 3: Add Product Categories to Catalog

In this step, you will add the product categories created above to the product catalog. While adding the categories to the catalog, the parent-child relationships are preserved. After creating the category you must associate it to the catalog created.

To add product categories to Catalog, login to Oracle Forms as a user that has the Catalog Manager responsibility. Navigate to the Catalog created in the previous step and add the category and any required sub-categories.

Step 4: Add Marketing Attributes

Product categories in the catalog have additional Sales and Marketing related attributes. These include:

- Include in Forecast: All product categories that can be forecasted against should have this flag set.
- Expected Purchase: All product categories that sales reps can log opportunity/lead lines against should have this flag set.
- Exclude From User View: Some product categories may be in the catalog for purely reporting and collection purposes. Such product categories should have this flag set. The product hierarchy presented to sales reps will ignore these categories. These can however be used by analytical and reporting tools such as Oracle Discoverer.

To setup these attributes, switch to Catalog Manager responsibility, navigate to the Catalog previously created and update the attributes as desired.

To attach the product reporting functional area, login to Oracle Forms as a user that has the Oracle Marketing Administrator responsibility.

Navigation: Inventory > Setup > Items > Categories > Default Category Sets

Notes

- Attach the functional area Product Reporting to the catalog (the category set) created.
- Next, run **Load Catalog Hierarchy** using the Catalog Manager responsibility. This enables the categories defined above to be made visible to the Marketing applications. Only categories with the following parameters will be pulled into this view:
  - FORECASTABLE_FLAG = Y
  - PURCHASE_INTEREST = Y

To run Load Catalog Hierarchy, log in to Oracle Forms as a user that has the Catalog Manager responsibility.

Navigation: View > Requests

Notes

- **Submit a New Request:** Specify the request Load Catalog Hierarchy and the Refresh Mode for the request.

Step 5: Viewing Marketing Categories

To see a list of categories used for marketing (to manually map) you will need to run the following script:

- AMSUPCMP.sql

This script is located in the Product Top directory (shown below):

- ProductTop/patch/115/sql

Step 6: Mapping Marketing Categories

After viewing the list of categories for Marketing, you will map them to the catalog previously created.

To access PLM UI for Mapping log in to the SSWA Using Catalog manager responsibility.

Navigation: Setup -> Setup Workbench > Catalog > Catalog Category Mapping

Step 7: Run Concurrent Program

After the categories are mapped, run **AMS Upgrade Product Categories** to migrate marketing data.

Implementing Oracle Inventory for Marketing Products

Oracle Product Hub handles product cataloging and change management for Oracle Marketing. Oracle Inventory acts as the physical repository for products.

You can create 2 different types of products using inventory:

- Inventory Items: These include tangible items such as books, clothing, appliances, and computers.
- Service Items: Currently, warranties, subscriptions, and contracts are supported as a newly created service product.

To implement products use the following sections:

- Validating Inventory Organization for Products, page 14-7
- Setting System Profiles for Products, page 14-7
- Validating Item Validation Organization, page 14-8
- Creating and Verifying Lookups for Products, page 14-9
- Running Concurrent Programs for Products, page 14-11
- Recompiling Key Flexfield Segments, page 14-11

Validating Inventory Organization for Products

Oracle Inventory must be properly implemented before using the Product Pages in Oracle Marketing. The Master Inventory Organization assigned will appear by default in the Oracle Marketing Product Pages. When creating new Products, they will be placed into the default Master Inventory Organization.

Set the profile **AMS : Item Validation Master Organization** to the default Master Inventory Oragnization for which Products will be selected from and created to.

Setting System Profiles for Products

Set the following profile option for Products:

Product Profile Options

Option	Required	Level	Setting	Effect/Limitation
AMS : Inventory Item Update Allowed	No	Site	Yes/No	Seeded value is No. By default, a Marketer is able to update Products created within the Oracle Marketing application.However, if a Marketer wants to be able update Products from Oracle Inventory, set this value to Yes at Site level.
AMS : Item Validation Master Organization	Yes	Site	NA	Indicates the default Master Inventory organization for which Products will be selected from or created to.

Validating Item Validation Organization

This step applies only if implementing Oracle iStore with Oracle Marketing.

Set **AMS : Item Validation Master Organization** and **IBE: Item Validation Organization** profiles at site and responsibility levels to the same Master Inventory Organization.

For more information about how iStore uses the IBE: Item Validation Organization profile option to derive its product database, see the *OracleiStore Implementation and Administration Guide*.

If the two Item Validation Organization profile options do not match at the same levels, then the Create Product button will not be display in the Store Administration UI's Catalog > Products menu. However, the iStore administrator still will have view and update privileges for Products within the inventory organization of the IBE: Item

Validation Organization profile option at its lowest-level setting.

Creating and Verifying lookups for Products

Use the following Lookups for Products:

Lookups for Products

Key	Type	Values	Meanings
ITEM_TYPE	Extensible	AI	ATO Option Class
		AOC	ATO item
		ATO	ATO model
		CONSULTING	Contracts - consulting
		EDU	Contracts - Education
		FG	Contracts - KIT
		FRT	Contracts - Media
		I	Contracts - Software
		K	License
		KIT	Contracts - Training
		M	Finished good
		MEDIA	Freight
		NRI	Inventory Type
		OC	Kit
		OP	Model
		P	Non-recurring
		PF	Option Class
		PH	Outside Processing Item
		PL	PTO Option Class
		POC	PTO model
		PTO	Phantom item
		REF	Planning
		RI	Product Family
		SA	Purchased Item
		SI	Recurring
		SW LIC	Reference Item
		TRAIN	

Key	Type	Values	Meanings
			Subassembly supply item
INVENTORY_ ITEM_ STATUS_ CODE	User	ACTIVE	Active
		INACTIVE	Inactive

Running Concurrent Programs for Products

If there has been a change in the flexfield structure, compile the Inventory System Items Flexfield and the Inventory Category Flexfield prior to running this concurrent program.

Run the concurrent program listed below to load the Oracle Inventory categories information into the Oracle Marketing database tables. This allows the appearance of current product categories data in the Oracle Marketing pages.

You only need to run the concurrent program after you create new categories in Oracle Inventory.

Profile Option for Products

Concurrent Manager	Required	Description
AMS Load Inventory Categories	Yes	Loads categories from the MTL schema to the AMS schema denormalized tables. This program should be run if and when a new category is created in Inventory or Advanced Product Catalog.

Recompiling Key Flexfield Segments

In Oracle Applications, key flexfields (KFFs) are customized fields used to enter multi–segment values such as part numbers, account numbers, etc.

You must recompile the key flexfield segments -- only once -- after creating them. If you do not perform this step, part numbers will appear as `X` in the Products pages.

To recompile the KFF segments, log in to Oracle Forms with System Administrator responsibility.

Navigation: Application > Flexfield > Key > Segments

Notes

- **Query on:**
  - Application: Oracle Inventory
  - Flex Title: System Items (MTL_SYSTEM_ITEMS_B_KFV)
- Select Unfreeze and then select Freeze.
- **Compile:** Recompile the key flexfield by selecting this button.

For more information, see the *Oracle Inventory User's Guide*. For general information on DFFs, see the *Oracle E-Business Flexfields Guide*.

Administering Products

See the following sections to administer products:

- Administering Product Templates, page 14-12
- Creating a New Product or Service Template, page 14-13
- Implementing the New Template, page 14-13
- Selecting Product Attributes in Seeded Product Templates, page 14-14

Administering Product Templates

Product templates enable a marketing administrator to configure product attributes. Configurable Product Options enable the marketer to define, at time of installing Oracle Marketing, the list of product attributes to be displayed in the inventory options side navigation menu for any responsibility.

This allows customizing of a list of product attributes based on business needs and integration requirements. Oracle Marketing provides a default template based on whether you are defining a product or a service. Selecting or clearing the desired product attributes can override the template.

You can define the list of product attributes for each responsibility and you can also specify if the product attributes are editable in the inventory options page. This feature allows you to isolate product attributes and limit their access to the appropriate users in accordance with business and integration requirements. This feature was added as an Enhancement request for Oracle *i*Store and Oracle Service Online.

Oracle Marketing Product Templates are different from inventory templates. Templates created here are used only in Oracle Marketing screens, which gives the user an option to configure the product attributes, which are displayed in inventory option side navigation menu.

Logical process of creating templates:

1. Create Product Templates - choose Service or Product Type.

2. Associate responsibility to the template.

3. For each product attribute select whether the attribute is defaulted, editable or hidden.

4. Depending on the responsibility of the user creating the product the templates associated to that responsibility will be implemented. If no templates are associated to the user, the default-seeded template is used.

Creating a New Product or Service Template

To create a new template, log in to Oracle Marketing.

Navigation: Administration > Setup > Product Option >Create Product Template

Notes

- **Type of Template**: Select the radio button for either a Product or Service template. When selecting a type, the PRODUCT_SERVICE_FLAG flag from AMS_PROD_TEMPLATES_B which will have value P/S. Depending upon the value meaning, it is retrieved from the ak_region_items/_tl.

Implementing the New Template

To set up the new template, log in to Oracle Trade Management.

Navigation: Administration tab, then Trade Management sub tab, and select the Product option.

Notes

- **Responsibilities region:** Retrieve the Marketing responsibility which will link to the template. Only one product template and one service template can be assigned to a responsibility. Optionally, remove an assignment.

- **Attributes region:**

  - **Default:** Select this to make an attribute the default when a product is created.

  - **Editable:** Select this to make an attribute updatable in the product screens. This field overrides the Hide field. If you select Editable, Hide is ignored.

  - **Hide:** Select this to make the attribute hidden in the product screens. This is overridden by a selected Editable parameter.

- **Select All:** Select this flag to enable all the attributes belonging to a selection the default and edit enabled.

Selecting Product Attributes in Seeded Product Templates

Different Inventory attributes can be assigned to a product, depending upon the type of product created -- Inventory or Service. If an Inventory product has been created, the attributes screen will display the specific Inventory and Order Management attributes; if the Service option has been selected, the specific Service default attributes will be displayed. The tables in this section list the seeded attributes for each of the two seeded product templates:

- Product (Inventory) Template
- Service Template

See the *Oracle Marketing User Guide* for more information on seeded Templates for Products and Service Attributes.

Implementing Price Lists

Price Lists are used to price Products. Products can be added to multiple price lists which can be in different currencies support a global pricing strategy. Price lists can have eligibility defined so that customers who match the criteria alone eligible for the price.

Events and Deliverables that are created as inventory items can be added to a price list. Price lists can be attached to Offers as qualifiers so that customers can get a discount on a specific price.

Oracle Quoting-Forms, Oracle Order Management, and Oracle Advanced Pricing must be implemented prior to setting up price lists.

To implement price lists in Oracle Marketing, follow these procedures:

- Setting System Profile Options for Price Lists, page 14-14
- Creating and Verifying Lookups for Price Lists, page 14-15

Setting System Profile Options for Price Lists

Set the following profile options for price lists:

Price List Profile Options

Option	Required	Level	Setting	Effect/Limitation
QP: Item Validation Organization	Yes	Responsibility	Select from Inventory Organizations set up in Inventory	Prices may be defined only for those Products which will be available in the specified organization.
AMS: Allow Updates to QP Price Lists in OMO	Yes	Responsibility	Yes/No	Selecting Yes will allow Price lists created using Advanced Pricing to be edited in Oracle Marketing. See also QP: Source System Code
AMS : Root Section for Price List Report	Yes	Site	Sections defined in the hierarchy Tab of iStore's Merchant UI	Price list report available from the overview page will utilize the section set in this profile to determine the section hierarchy. Items can be grouped into sections. Sections in turn can be grouped into other sections, creating a hierarchical structure.

Creating and Verifying Lookups for Price Lists

See the table below for Lookups and their types, values and meanings.

Lookups for Price Lists

Key	Type	Values	Meanings
AMS_ PRICE -LIST_ STATUS	System	Active Draft Rejected Pending Cancelled	Active Draft Rejected Pending Budget Approval Cancelled

15

Implementing Marketing Intelligence

This chapter covers the following topics:

- Marketing Intelligence Overview
- Implementing Marketing Intelligence
- Defining Marketing Calendar Periods
- Implementing Lead Intelligence

Marketing Intelligence Overview

Oracle Marketing's marketing intelligence is displayed as home page bins, reports, and charts that provide summary information about key marketing activities, along with links to recently accessed campaigns and events.

Marketing intelligence displays the following:

- Most Recent Bins: Display links to recently accessed campaigns and events. The links are generated automatically when you create or edit a campaign or event. The links navigate you to the details page for the object type. Most Recent bins are available for campaign and event objects.

- Reporting Bins: Display trend performance information for key marketing activities. Some examples include campaign effectiveness, event effectiveness, and marketing budgets. Each reporting bin contains links to more granular detailed reports.

- Reports: Displayed directly on the homepage are drill-down reports linked from a reporting bin, but with a configurable date range specified by the user. The date aggregate for the report is inherited from the calling bin. For example, when drilling down on the month of September, all data for the drilldown reports is about September.

- Charts: Display trend performance information for key marketing activities. They illustrate information based on date ranges specified by the user. In Oracle Marketing, charts render the top comparisons. For example, if you are viewing a Campaigns by Leads chart and the number of rows to display is10, then the chart for Campaigns by Leads will show the Top 10 Campaigns by Leads.

For more information on using Bins, Reports and Charts see the *Oracle Marketing User Guide*.

Implementing Marketing Intelligence

This section describes how to implement Marketing Intelligence functionality displayed on the homepage of the Oracle Marketing. This includes the Bins, Charts and Reports. Displaying the following marketing objects is covered in this section:

- Campaigns
- Events
- Budgets
- Key performance indicators
- Marketing activities
- Interaction history responses

See the following procedures to implement Marketing Intelligence:

- Setting System Profile Options for Marketing Intelligence, page 15-2
- Implementing Lookups for Marketing Intelligence, page 15-3
- Defining Exchange Rates, page 15-3
- Loading Marketing Facts for a Request Set

Setting System Profile Options for Marketing Intelligence

Set the following system profiles for Marketing Intelligence.

Marketing Intelligence Profile Options

Option	Required	Level	Setting
BIM Month Period Type	Yes	System	Select the month period type corresponding to the Marketing Calendar.
BIM Quarter Period Type	Yes	System	Select the quarter period type corresponding to the Marketing Calendar.
BIM Year Period Type	Yes	System	Select the year period type corresponding to the Marketing Calendar.

Implementing Lookups for Marketing Intelligence

This procedure is only necessary if using the Web response interface public APIs: AMS_RESP_REJECT_REASON and AMS_RESP_GRADE.

See the table below for lookups, types, values, and meanings:

Lookups for Marketing Intelligence - Web Responses

Key	Type	Values	Meanings
AMS_RESP_REJECT_REASON	User	User Defined	Organization defined rejection reasons.
AMS_RESP_GRADE	User	User Defined	Organization defined response grades.

Defining Exchange Rates

Exchange rates need to be defined between the transaction currency and the default currency code associated to the profile AMS Default Currency. The rates must be defined between the currencies, from the date the transactions will be loaded.

For example, if loading all the campaigns which started on or after 01/SEP/00 where the minimum approval date is 01/Mar/00, the currency exchange rates need to be defined from 01/Mar/00.

All the transactions amounts will be converted to the default currency code associated to the profile **AMS : Default Currency**. All currencies used in transactions must have a conversion rate defined with the conversion rate type specified in the profile **AMS : Currency Conversion Type**.

To define exchange rates, log into Forms for General Ledger Super User responsibility.

Navigation: Setup > Currencies > Rates > Daily > Enter by Date Range

Notes

- **Type:** Set the type equal to the type specified in the profile AMS : Currency Conversion Type

Loading Marketing Facts for a Request Set

You can load marketing facts to execute a request set by following the procedures in the sequence listed below:

- Loading Marketing Facts for a First Time Build, page 15-4
- Creating Initial Build of Materialized Views, page 15-6
- Loading Marketing Facts From a Previous Refresh Date, page 15-8
- Refreshing Materialized View for Campaigns, Events, and Budgets, page 15-10

Loading Marketing Facts for a First Time Build

Execute this Request Set only for the first time load. The Request for a first time build consists of 8 concurrent programs.

To run a request set, log in to Oracle Marketing as Marketing Intelligence Collection Manager.

Navigation: Requests > Run

Notes

- **Select the Request Set option and choose BIM:** Load Marketing facts for the first time from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.
- **Start Date:** The Start Date should be the first date for which data should be shown.
- Set the parameter values for the first row and verify that the Parameter columns of the second and third rows display the values defaulted from the first row. The Request set will run and execute the concurrent programs sequentially.

The following table lists the concurrent programs in the Request Set and their parameters.

Request Set: Loading Marketing Facts for a First Time Build

Sequence	Concurrent Program	Parameters	Est Time	Comments
0	BIM: Truncate all facts	Objects (select from: All, Campaigns, Events, Budgets, Leads, Lead Import, Response)	NA	This program removes all previously loaded facts. It should be used only when the data should be removed in its entirety
1	BIM: Load Marketing Facts for the First Time	Object to Load: Campaign Start Date: 01-SEP-00 End Dates: (SYSDATE)	2 Hrs., 15 Mins	Loads all Campaign Facts
2	BIM: Load Marketing Facts for the First Time	Object to Load: Event Start Date: 01-SEP-00 End Dates: (SYSDATE)	6 Mins	Loads all Event Facts
3	BIM:Load Marketing Facts for the First Time	Object to Load: Budget Start Date: 01-SEP-00 End Dates: (SYSDATE)	20 Mins	Loads all Budgets Facts
4	BIM:Load Key Performance Indicator Facts		1 Min	Loads KPI facts

Sequence	Concurrent Program	Parameters	Est Time	Comments
5	BIM: Load Marketing Facts for the First Time	Object to Load: Leads Start Date: 01-SEP-00 End Dates: (SYSDATE)	30 Mins	Loads Lead Facts
6	BIM: Load Marketing Facts for the First Time	Object to Load: Lead_Import Start Date: 01-SEP-00 End Dates: (SYSDATE)	7 Mins	Loads Lead Import Facts
7	BIM:Load Marketing Facts for the First Time	Object to Load: Response Start Date: 01-SEP-00 End Dates: (SYSDATE)	5 Mins	Loads Web Response Facts

Creating Initial Build of Materialized Views

Execute this Request Set only for the first time. This prepares the pre-built tables for all materialized views. This program has to be run only once and should not be run during subsequent loads.

If for any reason, a user intends to re-run this request set again, execute the Concurrent Program, **BIM: Truncate all facts**, before running the Concurrent Manager Program, **BIM: Load Marketing facts** for the first time.

To run the request set, log in to Oracle Marketing as Marketing Intelligence Collection Manager.

Navigation: Requests > Run

Notes

- Select the Request Set option and choose BIM: Initial build of Materialized Views from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.

- Parameter window: The Number of Parallel Processors is defaulted automatically to 8. Change the value for this parameter to 4. Four processors are sufficient to run this Request Set.
- The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4 for the second, third, and fourth rows.
- The Request set will run and execute all the above concurrent programs sequentially.

Request Set: BIM: Initial Build of Materialized Views

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Initial build of Campaigns Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Campaigns Materialized views
2	BIM: Initial build of Events Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Events Materialized views
3	BIM: Initial build of Budgets Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Budgets Materialized views
4	BIM: Initial build of Key Performance Indicators Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Key Performance Indicators Materialized views

Seq	Concurrent Program	Parameters	Est Time	Comments
5	BIM: Initial Build of Interaction History Response Materialized Views	--	1 Min	Prepares pre-built tables for Interaction History Response Materialized views

Loading Marketing Facts From a Previous Refresh Date

This request set will load all the marketing facts from the previous refresh date. Execute this Request Set on a daily basis. This program has to be run each time facts are loaded or refreshed.

Prerequisites: Marketing facts are properly implemented

To run a request set, log in to Oracle Marketing as Marketing Intelligence Collection Manager.

Navigation: Requests > Run

Notes

- Select the Request Set option and choose BIM: Load Marketing facts from previous refresh date from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.

- **End Date:** Change the End Date as desired in the Parameter column of the first row in the Parameter window.

- Verify that the Parameter columns of the second and third rows display the values defaulted from the first row. Change dates as desired. The Request set will run and execute the concurrent programs sequentially.

- Note that this program must be run on a daily basis. Run the Request Set: BIM: Refresh Materialized Views, above, to build the materialized views following the steps instructions listed above.

Request Set: BIM Load Marketing Facts from a Previous Refresh Date

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Load Marketing Facts from previous refresh date	Object to Load: Campaign End Date: (SYSDATE)	5 Mins	Loads all Campaign Facts
2	BIM: Load Marketing Facts from previous refresh date	Object to Load: Event End Date: (SYSDATE)	5 Mins	Loads all Events Facts
3	BIM: Load Marketing Facts from previous refresh date	Object to Load: Budget End Date: (SYSDATE)	5 Mins	Loads all Budget Facts
4	BIM: Load Key Performance Indicator facts from previous refresh date		5 Mins	Loads all KPI Facts
5	BIM: Load Marketing Facts from previous refresh date	Object to Load: Leads End Date (SYSDATE)	5 Mins	Loads Lead Facts
6	BIM: Load Marketing Facts from previous refresh date	Object to Load: Lead_Import End Date (SYSDATE)	5 Mins	Loads Lead Import Facts
7	BIM: Load Marketing Facts from previous refresh date	Object to Load: Response End Date (SYSDATE)	5 Mins	Loads Web Response Facts

Refreshing Materialized View for Campaigns, Events, and Budgets

The Request set: BIM: Refresh Materialized Views, builds the materialized views for Campaigns, Events, Budgets, Key Performance Indicators and Marketing Activities.

This Request Set should be run only after the facts are loaded, either by the Request Set: BIM: Load Marketing facts for the first time or by Request Set: BIM: Load Marketing facts from the previous refresh date.

This program has to be run each time after facts are loaded or refreshed.

To run the request set, log in to Oracle Marketing as Marketing Intelligence Collection Manager.

Navigation: Requests > Run

Notes

- Select the Request Set option and choose BIM: Refresh Materialized Views from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.
- **Parameter window:** The Number of Parallel Processors is defaulted automatically to 8. Change the value for this parameter to 4. Four processors are sufficient to run this Request Set.
- The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4 for the second, third, and fourth rows.
- The Request set will run and execute all the concurrent programs sequentially.

Defining Marketing Calendar Periods

The calendar periods must be defined for the Marketing Calendar for the fiscal year containing the date one year prior to the start date. The Start Date is the first date for which data in the Bins, Charts and Reports should be displayed. Also define the periods: Month, Quarter and Year.

Identify the Calendar associated with the profile **AMS : Marketing Calendar** and define Periods on this calendar for the Fiscal Year, which contains the date one year prior to the start date of the first time facts load, to the current Fiscal Year. It is required that periods of type Month, Quarter, and Year should be defined.

For example, the Fiscal Year starts from 1st June of every year. To load the facts from 01-SEP-00, it is required to define the periods for the Marketing Calendar starting with the Fiscal Year containing the date 01-SEP-99 to the current Fiscal Year.

To define marketing calendar periods, use the following procedure.

Steps:

1. Log into Forms with System Administrator responsibility.
2. Navigate to Profile > System.
3. Use Find to locate the profile AMS: Marketing Calendar and note the calendar entered in this profile.
4. Switch responsibility to General Ledger Super User.
5. Navigate to Setup > Financials > Calendars > Accounting.
6. Locate the Calendar noted above and verify the required periods of Month, Quarter and Year are defined.

Implementing Lead Intelligence

This section describes how to implement Lead Intelligence functionality that is displayed on the home page of the Oracle Marketing. This section covers how to display the following marketing objects on the home page:

- Leads
- Lead Import
- Web Surveys

See the following procedures to implement Lead Intelligence:

- Creating Initial Build of Materialized View for Lead Intelligence, page 15-11
- Refreshing Materialized Views for Lead Intelligence, page 15-14
- Loading Marketing Facts from Previous Refresh Date, page 15-16

Creating Initial Build of Materialized View for Lead Intelligence

Execute this Request Set only for the first time. This prepares the pre-built tables for all materialized views for Lead Intelligence. This program has to be run only once and should not be run during subsequent loads.

To run the request set, log in to Oracle Marketing as Marketing Intelligence Collection Manager.

Navigation: Requests > Run

Notes

- Select the Request Set option and choose BIM: Initial build of Materialized Views from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.
- **Parameter window:** The Number of Parallel Processors is defaulted automatically to 8. Change the value for this parameter to 4. Four processors are sufficient to run this Request Set.
- The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4 for the second, third, and fourth rows.
- The Request set will run and execute all the above concurrent programs sequentially.

Request Set BIM: Initial Build of Materialized Views for Lead Intelligence

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Initial build of Lead KPI Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead KPI Materialized views
2	BIM: Initial build of Lead Quality Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead Quality Materialized views
3	BIM: Initial build of Lead Sources Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead Sources Materialized views
4	BIM: Initial build of Lead Import Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Lead Import Materialized views

Seq	Concurrent Program	Parameters	Est Time	Comments
5	BIM: Initial Build of Responses Materialized Views	Number of Parallel Processors: 4	1 Min	Prepares pre-built tables for Responses Materialized views

Request Set: BIM: Refresh Materialized View

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Refresh of Campaign Materialized views	Number of Parallel Processors: 4	10 Mins	Builds Campaign Materialized views
2	BIM: Refresh of Events Materialized views	Number of Parallel Processors: 4	5 Mins	Builds Events Materialized views
3	BIM: Refresh of Budgets Materialized views	Number of Parallel Processors: 4	20 Mins	Builds Budgets Materialized views
4	BIM: Refresh of Key Performance Indicator Materialized views	Number of Parallel Processors: 4	5 Mins	Builds Key Performance Indicators Materialized views
5	BIM: Refresh of Marketing Activities Materialized views	Number of Parallel Processors: 4	5 Mins	Builds Marketing Activities Materialized views

Seq	Concurrent Program	Parameters	Est Time	Comments
6	BIM: Refresh of Interaction History Response Materialized views	Number of Parallel Processors: 4	5 Min	Builds Interaction History Response Materialized views

Refreshing Materialized Views for Lead Intelligence

Builds the Materialized views for Leads, Lead Import and Web Responses. This Request Set should be run only after the facts are loaded, either by the Request Set: BIM: Load Marketing facts for the first time or by Request Set: BIM: Load Marketing facts from the previous refresh date. This program has to be run each time facts are loaded or refreshed.

To run the request set, log in to Oracle Marketing as Marketing Intelligence Collection Manager.

Navigation: Requests > Run

Notes

- Select the Request Set option and choose BIM: Refresh Materialized Views from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.
- **Parameter window:** The Number of Parallel Processors is defaulted automatically to 8. Change the value for this parameter to 4. Four processors are sufficient to run this Request Set.
- The system displays a Parameter window with the parameter, Number of Parallel Processors, defaulted automatically to 4 for the second, third, and fourth rows.
- The Request set will run and execute all the concurrent programs sequentially.

Request Set: BIM Refresh of Materialized Views for Lead Intelligence

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Refresh of Summary by Group Hierarchy	Number of Parallel Processors: 4	10 Mins	Prepares summarized tables based on group hierarchy. This has to be run first before running any other lead intelligence refresh materialized view program.
2	BIM: Refresh of Lead KPI Materialized Views	Number of Parallel Processors: 4	45 Mins	Builds Lead KPI Materialized Views
3	BIM: Refresh of Lead Quality Materialized Views	Number of Parallel Processors: 4	60 Mins	Builds Lead Quality Materialized Views
4	BIM: Refresh of Lead Sources Materialized Views	Number of Parallel Processors: 4	60 Mins	Builds Lead Sources Materialized Views
5	BIM: Refresh of Lead Import Materialized Views	Number of Parallel Processors: 4	5 Mins	Builds Lead Import Materialized Views
6	BIM: Refresh of Responses Materialized Views	Number of Parallel Processors: 4	5 Min	Builds Responses Materialized Views

Loading Marketing Facts from Previous Refresh Date

This request set will load all the marketing facts from the previous refresh date. Execute this Request Set on a daily basis.This program has to be run each time facts are loaded or refreshed.

To run a request set, log in to Oracle Marketing as Marketing Intelligence Collection Manager.

Navigation: Requests > Run

Notes

- Select the Request Set option and choose BIM: Load Marketing facts from previous refresh date from the LOV. The Program block will list the concurrent programs in this request set. When programs are first listed, the Parameters column is blank for all programs.
- **End Date:** Change the End Date as desired in the Parameter column of the first row in the Parameter window.
- Verify that the Parameter columns of the second and third rows display the values defaulted from the first row. Change dates as desired. The Request set will run and execute the concurrent programs sequentially.
- Note that this program must be run on a daily basis. Run the Request Set: BIM: Refresh Materialized Views, above, to build the materialized views following the steps instructions listed above.

Request Set: BIM Load Marketing Facts from Previous Refresh Date

Seq	Concurrent Program	Parameters	Est Time	Comments
1	BIM: Load Marketing Facts from previous refresh date	Object to Load: Campaign End Date: (SYSDATE)	5 Mins	Loads all Campaign Facts
2	BIM: Load Marketing Facts from previous refresh date	Object to Load: Event End Date: (SYSDATE)	5 Mins	Loads all Events Facts

Seq	Concurrent Program	Parameters	Est Time	Comments
3	BIM: Load Marketing Facts from previous refresh date	Object to Load: Budget End Date: (SYSDATE)	5 Mins	Loads all Budget Facts
4	BIM: Load Key Performance Indicator facts from previous refresh date		5 Mins	Loads all KPI Facts
5	BIM: Load Marketing Facts from previous refresh date	Object to Load: Leads End Date (SYSDATE)	5 Mins	Loads Lead Facts
6	BIM: Load Marketing Facts from previous refresh date	Object to Load: Lead_Import End Date (SYSDATE)	5 Mins	Loads Lead Import Facts
7	BIM: Load Marketing Facts from previous refresh date	Object to Load: Response End Date (SYSDATE)	5 Mins	Loads Web Response Facts

A

Oracle Marketing Profile Option Reference

This appendix covers the following topics:

- Before You Begin
- Setting Profile Options
- Oracle Marketing Profile Option Reference

Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing adcmctl.sh <APPS username/APPS password> start.

Setting Profile Options

Most profile options ship with a seeded value. Setting or changing profile option values is one way to change the default behavior of the application. You may or may not want to change profile option values depending on business requirements.

Profile options can be set at four levels:

- Site: Settings at this level affect the entire Oracle E-Business Suite.
- Application: Setting profiles at this level overrides the site level setting for the particular application. This level enables the setting to be applied to the specific application you are working with.
- Responsibility: Setting profiles at this level affects users of a given responsibility. At this level it overrides the application level setting for users of the particular responsibility.

- User: Setting profiles at the user level affect the individual user only. At this level it overrides the responsibility level setting for an individual user.

To set any profile option, log in to Oracle Forms with the System Administrator responsibility.

Navigation: Profile > System

Notes

- Set the profile option(s) at the levels you selected.
- **Profile:** enter the profile name, such as `AMS: Default Percent Formula`, or a wildcard search criterion such as `AMS%`.
- **Field and Variable Values window:** Choose **APPLICATION_ID.** The Value field in the Examine Field and Variable Values window is populated with this value.
- **Examine Field and Variable Values window:** Choose **RESPONSIBILITY_ID**. The Value field in the Examine Field and Variable Values window is populated with this value.

> **Note:** When setting profile options it may be necessary to log out and back in (and stop/restart the Web server) for changes to take effect.

Oracle Marketing Profile Option Reference

The following table displays profile options used by Oracle Marketing.

Oracle Marketing Profile Options

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Admin Group	Required	Site	Select from any group defined in JTF Resource Groups	Resources that are part of this group will have full access to all campaigns, Events, and other marketing objects. Note that this should be a single level group.
AMS : Auto Register for Events upon cancellation	Required	Site	Yes/No	This is used to determine if the attendee can be moved from the waiting list to registered status if a spot is available

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Budget Adjustment Grace Period in Days	Optional	Site Appl Resp User	Enter any integer (for number of days)	Budget reconciliation may be performed manually or automatically. • **If automatic:** The "AMS-TM: Release Committed Budget Amount After Grace Period concurrent program is used to reconcile budgets. This program waits before reconciling the sourced budgets of an object after the closing date of the object. • **If manual:** The offer is evaluated on a case by case basis. Use automatic if you would like to systematically reconcile the budgets.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Confirmation URL	Required	Site	URL	Contact preferences can be updated by the user using self service pages which are invoked by updating the contact preferences link in an e-mail text body. Once the user updates the contact preferences he or she is redirected to the page specified in this profile.
AMS : Copy Event Details to Event Schedules	Required	Site	Yes/No	This is used to allow details of parent Event to be copied to the schedule

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS: Cut Off Percentage for Approval	Optional	Site	Enter any number (for percentage)	This determines what percentage of the estimated budget amount an object must secure in actual funding before the object can go active. For example, if you enter 100, it means 100%. An offer's estimated budget amount is $10K, meaning that it is estimated that this offer must get budget approved for $10K before the offer can go active. This applies only to a Trade Management implementation.
AMS : Currency Conversion Type	Required	Site	Select from conversions defined in GL, such as Corporate or Spot.	This is the exchange rate used for converting transactional amounts into the default currency.
AMS : Custom Condition Class	Optional	Site	Java class name of the custom condition	This class is invoked in the runtime when custom conditions are implemented.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Cut off percentage for Approvals	Required	Site	Enter a value between 0 and 100	For a marketing object with an Initial Estimated Amount (IEA) value entered into the Budget page for that object to go to Active status, it must obtain budget approval for this percentage of the IEA. During the initial stage, before the object status is Active, requests in excess of the IEA are not allowed.
AMS : Data Mining Across Database Link	Optional	Site	Yes or No	Profile to determine if data mining uses a DB Link. Determines if the installation is a single or dual installation No (or no value) for this profile means single installation scenario. Yes means a dual installation scenario.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Data Mining Debug Enabled	Optional	User	Default value is No. When set to Yes, debug is turned on, when set to No, debug is turned off.	Enables debugging information to be written in the concurrent request log.
AMS : Data Mining Server JDBC URL	Required for a dual installation	Site	This site level profile option is required if the customer is implementing a dual installation system, where Apps is in one instance and ODM is in another.	The JDBC connect string for the ODM server. Only required for a dual installation data mining scenario.
AMS : Default Currency Code	Required	Site	Select from currencies defined in FND_ CURRENCIES	This becomes the default functional currency. All transactions will be converted and stored in this currency. This will be the default currency for Currency LOV.
AMS : Default Cust View	Optional	Site Appl Resp User	Yes/No	Default value is **No**. If set to **Yes**, a user can see the Budget Customer View from the Budget summary page.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Default Product Stylesheet	Required	Site	User defined	Determines the default stylesheet file for Products.
AMS : Default Schedule Stylesheet	Required	Site	User Defined	Determines the default stylesheet file for Schedules.
AMS Enable Fulfillment	Optional	Site	Yes/No	Enables Oracle One-to-One Fulfillment Service Integration.
AMS : Enable Tip Text	Optional	User	Yes/No	Tip text will be displayed in the UI.
AMS : HZ Dedupe Rule	Optional	Site	Yes/No	Indicates whether deduplication rules are in effect for records placed into TCA.
AMS : Implement Contra Charge payment method	Required	Site	Yes/No	If set to Yes, " Contra Charge" is a settlement option available when settling claims. Contra charges are used to track offsetting balances for creditors who are also debtors.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Implement Client File Size	Required	Site	Numeric value	Default value is 1000000. For Oracle Marketing List Import functionality, this value sets the file size limit in terms of bytes that can be uploaded by client.
AMS : Import Control File Path	Required	Site	Control File Location	Path for the bin directory ($AMS_TOP/bin) Improper setup will cause the server side import to fail.
AMS : Import Date File Path	Required	Site	Data File Location	Path for the data file location Improper setup will cause the server side import to fail.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Interaction Logging Enabled	Optional	Site	-	To enable click-through destination logging in Interaction History, each time a customer/prospect clicks the URL, set AMS : Interaction Logging Enabled at site level. If set to Yes, each click-through is logged in Interaction History, in the JTF Interaction History Tables. If set to No, each click-through is not logged. This logging trail tracks the following information from the click through: • Party-id • Campaign Activity source code • Time and Date of the click-through

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Item Validation Master Organization	Required	Site	A Valid Master Inventory Organization	When a deliverable is flagged as an inventory item, it is created in Inventory under the specified master organization.
AMS : Inventory Item Update Allows	Optional	Site	Yes/No	Default value is no. a Marketer is able to update products created within the Oracle Marketing application.However, if a Marketer wants to be able update products from Oracle Inventory, set this value to Yes at Site level.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Marketing Calendar	Required	Site	Accounting Setting	Seeded value for this profile is Null. The Calendar needs to be created and associated to this profile. For Oracle Marketing objects, the time periods come from the marketing calendar. The Marketing Calendar setups are performed prior to implementing Oracle Marketing.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Marketing to ODM Database Link	Required	Site	All database links in the database.	This profile is only necessary if implementing ODM in a dual instance environment. The value of this profile options should be the name of the database link from the Oracle Marketing database instance to the ODM database instance. It allows Oracle Marketing to read scoring run results from the ODM results tables.
AMS: Merchant Party ID	Optional	Site	Choose from a list of Parties provided	This value determines the party ID of the current active merchant. This sets the merchant ID for the creation of affiliate placements. This option must be set before creating an affiliate site.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : OA_Media Path	Optional	Site	Physical file path of media directory where the image files are stored.	This is used in the upgrade process to read the files from the media directory and store them in the database.
AMS : ODM to Marketing Database Link	Optional	Site	Name of database link	Profile to determine the DB Link from ODM to APPS database. It is only required for a dual installation data mining scenario.
AMS : Posting Runtime Shopping Cart Currency	Required	Site	Select from a list of values. USD is the default.	Determines the currency in which shopping cart amounts are measured.
AMS : Queue : Marketing Lists - Manual Assignments	Optional	All	Yes/No	This profile determines if a user can work on Marketing Lists - Manual Assignments. This profile assigns the user a universal work queue. In UWQ you can enable or disable a note that is exposed by telesales.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Queue Order : Marketing Lists - Manual Assignments	Optional	All	Yes/No	This profile is only applicable when Oracle Marketing is integrated with Oracle Telesales. Determines the order of appearance for the Universal Work Queue. This is only applicable if the profile AMS : Queue : Marketing Lists - Manual Assignment is enabled.
AMS : Prefix to Registration Confirmation Code	Optional	Site	User Defined	Characters for the Event Registration Confirmation Code.
AMS : Pricelist Header Name for Events	Required	Site	User defined entry	Enter the name of the default price list for Events.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Price Different Budget	Optional	Site Appl Resp User	Choose a budget from a list of available budgets	This is used for accruals created by the AMS-TM: Charge back Accruals concurrent process (which do not have any budgets assigned). The program imports sell-through sales data into TM, often for the purpose of forecasting or creating promotional accruals for indirect customers.
AMS : Profile Search Set Size	Required	User	Numeric	Indicates the number of rows displayed in selection windows.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS: Server URL	Optional	Site	User Defined	This value determines the runtime URL path of the server. Used to generate API details for affiliates during placement definition. This must be set before creating any affiliate placement definition. For example: *http://YourHostName:PortNum*
AMS : Should Call to Inventory Modules be Made?	Required	Site	Yes/No	Indicates whether a deliverable or an Event may be created as an Oracle Inventory item.
AMS : Should call to Pricing Modules be Made?	Required	Site	Yes/No	Indicates whether a deliverable or an Event may be priced.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Source Code Date Format	Required	Site	Less than 6 characters	Used in the generation of source codes. The value has to be less than 6 characters (ex. "MMDDYY"). Apache Server needs to be bounced after setting the profile options.
AMS : Source Code sequence length	Required	Site	Value must be between 1 and 10	Source Code includes Geography code, Month code, Activity code, and Source code digits. The value can be anything between 1 to 10 (4 or 5 is recommended). Apache Server needs to be bounced after setting the profile options.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Source From Parent Object	Required	Site	Yes/No	Determines whether Campaign Activitiess and Event Schedules are sourced from their parent campaigns and Events (Yes) or from budgets (No). Campaigns and Events, themselves, may only be sourced from budgets.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : Universal Currency	Required	Site	Choose any valid currency from a list of available currencies	This profile determines the currency for the rollup view. It allows the rollup view of a budget to display correctly by converting all entries to a single currency. Different users will, however, be able to see the Rollup View in different currencies based on the user level profile option JTF_PROFILE_DEFAULT_CURRENCY. (In other words, the universal currency profile is simply for storage in the background). Once set the profile should not be changed.
AMS : Update Claim Access	Optional	Site User	Yes/No	This profile controls whether non-claim owners AND non-claim team members get update or view access to the claims.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS : UOM Area	Required	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, area in square feet).
AMS : UOM Length	Required	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, length in feet).
AMS : UOM Time	Required	Site	Depends on UOM Setup	If not set correctly, will not be displayed for fields that use UOM (for example, time in minutes).
AMS : Upgrade Complete Flag	Optional	Site	Yes/No	Yes means no upgrade and No means will upgrade data.
AMS : Upgrade iMarketing	Optional	Site	Yes/No	Used to determine whether to upgrade iMarketing data from the previous version.
AMS : User Country	Required	User	Select from valid countries	Defaults new objects to this country when created.

Option	Required/Optional	Level	Setting	Effect/Limitation
HZ: Address Key Length	Optional	Site	Length of the Address	This determines the length of Address key.
BIM Month Period Type	Required	Syst	-	Select the month period type defined on the Marketing Calendar.
BIM Quarter Period Type	Required	Syst	-	Select the quarter period type defined on the Marketing Calendar.
BIM Year Period Type	Required	Syst	-	Select the year period type defined on the Marketing Calendar.
Client Timezone	Required	User	Select from a List of Timezone Values	This profile is used by the Marketing APIs for converting user entered date and time to server specific date and time. This profiles replaces AMS : CLIENT_TIME_ZONE_ID.
HZ: Key Word Count	Optional	Site	Number of words	This number determines how many words in the customer name are used to generate the keys.

Option	Required/Optional	Level	Setting	Effect/Limitation
HZ: Postal Code Key Length	Optional	Site	Length of the Postal Code	This determines the length of Postal Code key.
IBE: Use Web Placements	Required	App	Yes/No	Determines whether placements are displayed. Required only when implementing *i* Store.
ICX: Discoverer End User Layer	Required	Site	User Defined	EUL prefix for Discoverer, Usually EUL4
ICX: Discoverer Launcher	Required	Site	User Defined	URL to launch Discoverer Web version
ICX: Discoverer Use Viewer	Optional	Site	Yes/No	Whether to use viewer instead Web Discoverer. Defaulted to No.
ICX: Discoverer Viewer Launcher	Required	Site	User Defined	URL to launch Discoverer viewer
JTF Home Page File Name	Optional	Site or App	User Defined.	Enter a file name of the jsp file (for example, jtfhomepage.jsp). If no value is supplied, a generic information page is displayed. If a file is supplied it will be displayed on the homepage.

Option	Required/Optional	Level	Setting	Effect/Limitation
JTF_FM_BASE_IMAGE_URL	Optional	Site	Host and port name of application installation instance	If adding images to templates this profile must be set at site level. When uploading images to be stored in the database, the application must be enabled to retrieve files from the database. This profile enables this retrieval. The value of this profile must be set to the same value as your application installation. For example: http://<host_name>:<port_number>/OA_HTML/
JTF_FM_UNSUBSCRIBE_TEXT	Optional	Site	Replace host and port with your host name and port number.	Use this profile to enable users to unsubscribe from email blasts. @ Click <a href="http://host:port/OA_HTML/amsContactPreferencesMain.jsp?PAGE. OBJ.requestId=&PAGE.OBJ.objId="hereto unsubscribe.

Option	Required/Optional	Level	Setting	Effect/Limitation
OSO: Minimum search string length	Optional	Site or User	User Defined	The default setting is 0. This profile determines the number of characters that must be entered before performing a search.
OSO: Search Lead Wildcard	Optional	Any	Yes/No	If Yes, the wildcard (%) will be allowed as the first character in a search string. If No, and the wildcard is entered as the first character, the system will give the user an error message.
OSO : Customer Access Privilege	Required	Resp	Full	Set this profile to Full in order to grant access the Venue subtab.
QP: Accrual UOM Class	Required	Site	UOM Classes as set up in Inventory	Used by accrual offers. All accrual units will fall under this UOM class. For example, frequent flyer miles.

Option	Required/Optional	Level	Setting	Effect/Limitation
QP: Item Validation Organization	Required	Resp	Select from Inventory Organizations as set up in Inventory	Offers can be defined only for those products which will be available in the specified organization. Required for all offers. Prices may be defined only for those products which will be available in the specified organization.
Server Timezone	Required	Site	Select from a List of Timezone Values	This profile is used by the Marketing APIs for converting user entered date and time to server specific date and time. Note: AMS : SERVER_TIMEZONE_ID is obsolete and Server Timezone should be used instead.

Option	Required/Optional	Level	Setting	Effect/Limitation
QP: Source System Code	Required	Resp	Possible Source Systems that can define offers	Offers created using this relationship are tagged with this system source code and will be used to determine update privileges of offers within the pricing module.
Task Manager: Default assignee status	Optional	App	User Defined	Specifies the default assignee status when creating or assigning a task.
Task Manager: Default Priority	Optional	App	User Defined	Specifies the default task priority when creating a task.
Task Manager: Default Task Status	Optional	App	User Defined	Required for implementing a task transition rule. This profile option must be set to the initial status of the rule.
Task Manager: Owner type for a task	Optional	App	User Defined	Specifies the default task type when creating a task.
AMS: Enable List Recalculation and Preview	Optional	Site	User Defined	If this profile value is set to "Yes", the Recalculate and the Preview Entries functions are enabled.

Option	Required/Optional	Level	Setting	Effect/Limitation
AMS: Hide Edit Metrics	Optional	App	User Defined	If this profile value is set to "Yes", the Edit Metrics column is hidden.
AMS: Batch Size	Optional	Site	User Defined	Sets a default value for bulk update during Metric refresh. For example, the user can specify a default value for the batch size such as 100 or 1000.
AMS: List Size Threshold	Optional			Used to split a list option. When splitting a list, a button 'Preview Count' is displayed only if the list size is less than the value of this profile. The default value is 10000.

B

Oracle Marketing Lookup Reference

This appendix covers the following topics:

- Understanding Lookups
- Creating New Lookup Types
- Oracle Marketing Lookup Reference

Understanding Lookups

Lookups provide the list of values (LOVs) that appear in Oracle Marketing user interface drop-down lists. Lookup values make choosing information quick and easy, they ensure that users enter only valid data into Oracle Marketing.

Most Lookups are predefined (seeded in the application), the seeded value can be left as is, or they can be customized to fit your business needs. Lookups are stored in the FND_LOOKUPS table which is part of the Application Object Library (AOL).

You can add new Lookups Values at any time. You can set the Enable Flag for a Value to No, so that it will no longer appear in the list of values, or you can use the Start and End Dates to control when a value will appear in a list.

When implementing Oracle Marketing you will be setting three types of Lookups:

- System: System Lookups may not be modified or deleted, and may not have additional values added.
- Extensible: Extensible Lookups may have additional values added to the list. Seeded extensible Lookups may not be deleted.
- User: User Lookups are completely modifiable. They may be modified and/or added to. Seeded user Lookups, if any, may be modified or deleted.

Note: All levels of Lookups may have their visible values modified.

Creating New Lookup Types

To create a new lookup type, add values to an existing lookup type, or prevent existing values from appearing in a lookup type, use the Application Utilities Lookups window.You must log out and log in again to see the effect of your changes.

To define a new Lookup type and Lookup value, log in to Oracle Forms with System Administrator Responsibility.

Navigation: Application > Lookups

Notes

- **Global Security Group:** If you want to add lookup values specific to the security group/business group linked to your current responsibility, de-select the Global Security Group check box. Existing lookup values are available to all business groups.
- **Start Date:** If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
- To add a new value to an existing Lookup, query and find the existing lookup. Note that you may add values to Extensible and User lookups.

Oracle Marketing Lookup Reference

The following table lists the Lookup settings used by Oracle Marketing.

Oracle Marketing Lookup Values

Key	Type	Values	Meanings
AGGREGATE_BY	System	YEAR	Year
		MONTH	Month
		QTR	Quarter
		INCREMENT	Increment
AMS_ ACCESS_ TYPE	System	GROUP	Group
		USER	User

Key	Type	Values	Meanings
AMS_ ACCRUAL_ BASIS	System	CUSTOMER	Customer
		SALES	Sales
AMS_ ADJUSTMENT_TYPE	Exten-sible	DECREASE_ COMMITTED	Decrease Committed Amount
		DECREASE_ COMM_ EARNED	Decrease Committed and Earned Amounts
		DECREASE_ EARNED	Decrease Earned Amount
		STANDARD	Increase Earned Amount
AMS_ BUDGET_ SOURCE_ STATUS	System	APPROVED	Approved
		CLOSED	Closed
		NEW	Planning
		PENDING	Pending
		REJECTED	Rejected
AMS_ BUDGET_ TRANS_TYPE	User	CREDIT	Credit
		DEBIT	Debit
AMS_CAMP_FULFIL L_ON	System	ON_INVITE	On Invite
AMS_CAMP_ RELATED_ EVENT	System	EONE	One-Off Event
		EVEH	Event
		EVEO	Event Schedule
AMS_ CAMPAIGN_PURPO SE	Exten-sible	AWARENESS	Awareness
		LEAD	Lead Generation (?)
		LEAD_ MATURATION	Lead Maturation
		SALES_ READINESS	Sales Readiness

Key	Type	Values	Meanings
AMS_ CAMPAIGN_ SCHEDULE_STATUS	System	ACTIVE ARCHIVED AVAILABLE CANCELLED CLOSED COMPLETED DENIED_BA NEW ON_HOLD SUBMITTED_ BA	Active Archived Available Cancelled Closed Completed Denied Budget Approval New Active, but locked Pending Budget Approval
AMS_ CAMPAIGN_ STATUS	System	ACTIVE ARCHIVED AVAILABLE CANCELLED CLOSED COMPLETED DENIED_BA DENIED_TA NEW ON_HOLD PLANNING SUBMITTED_BUDGET APPROVAL SUBMITTED_THEME APPROVAL	Active Archived Available Cancelled Closed Completed Denied Budget Approval Denied Theme Approval New Active, but locked Planned Submitted for Budget Approval Submitted for Theme Approval

Key	Type	Values	Meanings
AMS_CLAIM_ CLASS	System	CLAIM	Claim
		DEDUCTION	Deduction
AMS_CLAIM_ HISTORY_ EVENT	System	CHANGES	Changes
		LINE	Line
		NEW	New
		SPLIT	Split
AMS_CLAIM_ PAYMENT_ METHOD	System	CHECK	Check
		CREDIT_MEMO	Credit Memo
		DEBIT_MEMO	Debit Memo
AMS_CLAIM_STAT US	System	APPROVED	Approved
		CANCELLED	Cancelled
		CLOSED	Closed
		COMPLETE	Complete
		DUPLICATE	Duplicate
		NEW	New
		OPEN	Open
		PENDING	Pending
		PENDING_APPROV AL	Pending Approval
		PENDING_CLOSE	Pending Close
		REJECTED	Rejected

Key	Type	Values	Meanings
AMS_ CONTACT_ POINT_TYPE	Exten-sible	ADDRESS EMAIL FAX INBOUND_ SCRIPT OUTBOUND_ SCRIPT PHONE WEBSITE PROPOSAL	Address Email Fax Inbound Script Outbound Script Phone Website Proposal
AMS_ CONTENT_ TYPE	Exten-sible	HTML TEXT	HTML Text Used for email schedules
AMS_ CREATION_ SIGN	System	+ -	Positive Negative
AMS_ DEDUCTION_ PAYMENT_ METHOD	System	ADJUSTMENT CHARGEBACK CONTRA_CHARGE CREDIT_MEMO DEBIT_MEMO REG_CREDIT_MEMO WRITE_OFF	Adjustment Chargeback Contra Charge On Account Credit Debit Memo Invoice Credit Write Off

Key	Type	Values	Meanings
AMS_DELIV_STATUS	User	ARCHIVED AVAILABLE CANCELLED DENIED_BA NEW SUBMITTED_BA SUPERCEDED EXPIRED DENIED_TA BUDGET_APPR SUBMITTED_TA	Archived Available Cancelled Denied - Budget Approval New Submitted - Budget Approval Superceded Expired Denied - Concept Approval Budget Approved Submitted - Concept Approval
AMS_DELIVERY_MEDIA_TYPE	Extensible	I SEMINAR ON_SITE SEMINAR WEB	I Seminar On Site Seminar Web
AMS_DM_ MODEL_ STATUS	System	AVAILABLE DRAFT BUILDING SCHEDULED SCORING ARCHIVED EXPIRED CUSTOM PREVIEW QUEUED	Available Draft Building Scheduled Scoring Archived Expired Custom Preview Queued

Key	Type	Values	Meanings
AMS_DM_ MODEL_ TYPE	System	EMAIL TELEMARKETING DIRECTMAIL LOYALTY CUSTOM	Email Response Telemarketing Response Direct Mail Response Loyalty Custom
AMS_DM_ SCORE_ STATUS	System	DRAFT SCHEDULED SCORING COMPLETED ARCHIVED PREVIEW QUEUED	Draft Scheduled Scoring Completed Archived Preview Queued
AMS_DM_ SOURCE_ TYPE	System	STANDARD CELL CSCH DIWB	Generated List Segment Campaign Activity Discoverer Workbook
AMS_DM_ TARGET_ GROUP_ TYPE	System	BUSINESS CONSUMER	Organization Contacts Persons
AMS_DM_ TARGET_ VALUE_ TYPE	System	BINARY CATEGORICAL CONTINUOUS	Binary Categorical Continuous
AMS_EVENT_AGEN DA_ STATUS	System	CONFIRMED UNCONFIRMED	Confirmed Unconfirmed

Key	Type	Values	Meanings
AMS_EVENT_ATTENDANCE_FAILURE	System	AGENDA_CHANGE DISASTER PERSONAL_EMERGENCY SCHEDULE_CONFLICT SPEAKER_CHANGE VENUE_CHANGE WORK_EMERGENCY	Agenda Change Natural Disaster Personal Emergency Schedule Conflict Speaker Change Venue Change Work Emergency
AMS_EVENT_CANCEL_ REASON	System	DISASTER INSUFFICIENT_REG POSTPONED SCHEDULE_CONFLICT SPEAKER_ UNAVAILABLE VENUE_UNAVAILABLE	Natural Disaster Insufficient Registration Postponed Schedule Conflict Speaker not available Venue not avaialble
AMS_EVENT_CERT_ CREDIT_ TYPE	System	GENERAL SEED	General Seed
AMS_EVENT_DAY	System	FIVE FOUR THREE TWO ONE	5 4 3 2 1
AMS_EVENT_FULFILL_ON	System	ON_CANCEL ON_ENROLL ON_REG	On Cancellation On Enrollment On Registration

Key	Type	Values	Meanings
AMS_EVENT_FULFILL_ON	System	ON_CANCEL ON_ENROLL ON_REG	On Cancellation On Enrollment On Registration
AMS_EVENT_LEVEL	System	MAIN SUB	Main Sub
AMS_EVENT_PAYMENT_ STATUS	System	COMP FREE INVOICED PAID REFUNDED	Complimentary Free Invoiced Paid Refunded
AMS_EVENT_PURPOSE	N/A	N/A	(Obsolete)
AMS_EVEH_PURPOSE	User	Organization defined values	Purpose for the Event.
AMS_EVENT_REG_CANCEL_REASON	System	AGENDA_CHANGE COST PERSONAL_EMERGENCY PRICE_CHANGE SCH_CONFLICT SPEAKER_CHANGE VENUE_CHANGE WORK_EMERGENCY	Agenda Change Cost Personal Emergency Price Change Scheduling Conflict Speaker Change Venue Change Work Emergency

Key	Type	Values	Meanings
AMS_EVENT_REG_SOURCE	System	CALL_CENTER	Call Center
		EXTERNAL	External
		ON_SITE	On Site
		PARTNER	Partner
		WEB	Web
AMS_EVENT_REG_STATUS	System	CANCELLED	Cancelled
		ENROLLED	Enrolled
		REGISTERED	Registered
		TARGETED	Targeted
		WAITLISTED	Waitlisted
AMS_EVENT_RESOURCE_ TYPE	System	AMS_PEOPLE	People
AMS_EVENT_ SCHEDULE_OBJECTIVE	N/A	N/A	(Obsolete)
AMS_EVEO_OBJECTIVE	User	Organization defined values	Objective for the Event.
AMS_EVENT_SPEAKER_ STATUS	System	BOOKED	Booked
		CANCELLED	Cancelled
		CONFIRMED	Confirmed
		SCHEDULED	Scheduled

Key	Type	Values	Meanings
AMS_EVENT_STATUS	System	ACTIVE	Active
		ARCHIVED	Archived
		AVAILABLE	Available
		CANCELLED	Cancelled
		CLOSED	Closed
		COMPLETED	Completed
		DENIED_BA	Denied Budget Approval
		DENIED_TA	Denied Concept Approval
		NEW	New
		ON_HOLD	Active, but locked
		Submitted_ Ba	Pending Budget Approval
		SUBMITTED_TA	Pending Concept Approval
		PLANNING	Planning
AMS_EVENT_STREAM_ TYPE	System	A	A
		B	B
		C	C
		D	D

Key	Type	Values	Meanings
AMS_EVENT_TYPE	System	BRIEFING	Briefing
(Event Activities)		CONFERENCE	Conference
		EXHIBITION	Exhibition
		HOSPITALITY	Hospitality
		INTERNAL_EVENT	Internal Event
		LAUNCH	Launch
		SEMINAR	Seminar
		SPEAKING_ ENGAGEMENT	Speaking Engagement
		SPONSORSHIP_EVENT	Sponsorship
		TRADE_SHOW	Trade Show
		WEB_SEMINAR	Web Seminar
		WORKSHOP	Workshop
AMS_EVENT_WAITLIST_ ACTION	System	FIRST_COME_FIRST	First Come First Served
AMS_FUND_ SOURCE	System	CAMP	Campaign
		EVEH	Event
		EVEO	Event Schedule
		FUND	Budget
		CSCH	Campaign Activity
		DELV	Deliverable
		EONE	One Off Event
		OFFR	Offer
		PTNR	Partner
		OPTN	Other Partner
		VEND	Vendor
		USER	Person

Key	Type	Values	Meanings
AMS_FUND_ STATUS	System	ACTIVE	Active
		ARCHIVED	Archived
		CANCELLED	Cancelled
		CLOSED	Closed
		DRAFT	Draft
		ON_HOLD	On Hold
		PENDING	Pending Approval
		REJECTED	Rejected
AMS_FUND_ TYPE	System	FIXED	Fixed
		FULLY_ ACCRUED	Fully Accrued
AMS_GL_ DATE_TYPE	System	CLAIM_DATE	Claim Date
		DUE_DATE	Due Date
		SYSTEM_DATE	System Date
AMS_GL_ EVENT_ LINE_TYPE	System	ACCRUAL_LIABILIT Y	Accrual Liability
		EXPENSE_ACCOUN T	Expense Account
		REC_CLEARING	Receivable Clearing Acct.
		VEN_CLEARING	Vendor Clearing Account
AMS_GL_ EVENT_ STATUS	System	ACCOUNTED	Accounted
		ACCOUNTED_WIT H_ERROR	Accounted with Error
		CREATED	Created a New Transaction

Key	Type	Values	Meanings
AMS_GL_ EVENT_TYPE	System	ACCRUAL	Accrual Liability
		ACCRUAL_ADJUST MENT	Accrual Adjustment
		CONTRA_CHARGE	Settle by Contra Charge
		SETTLE_BY_CREDIT	Settle by Credit Memo
		SETTLE_BY_WO	Settle to Writing Off
		SETTLE_BY_CHECK	Settle by Payment Voucher
AMS_ HISTORY_ RULES_ OBJECT	System	CLAIM	Claim
AMS_ IMPORT_ STATUS	System	NEW	New Import
		STAGED	Entries are imported and available for viewing
		SCHEDULED	Import is setup and ready to be completed at the scheduled time.
		COMPLETED	Import completed.
		PURGED	Imported entries have been purged from the Marketing Import Table.
		CANCELLED	The list import has been cancelled and may not be reactivated.
		ERROR	An error occurred during list import.

Key	Type	Values	Meanings
AMS_ IMPORT_ TYPE	System	CUSTOMER EVENT LEAD	Organizations, Persons and TCA data. Event registration data. Leads data.
AMS_LIST_ ACT_TYPE	User	Employee List LIST	Target group list selection type
AMS_LIST_ DEDUP_ TYPE	User	LIST IMPORT CONSUMERS IMPORT ORGANIZATIONS	Type of Deduplication Rules to be applied.
AMS_LIST_GENERA TION_TYPE	System	FULL REFRESH APPEND NEW RECORDS UPDATE ATTRIBUTES ONLY	Full refresh of all the entries. New entries meeting the criteria added. Only the attributes of the entries updated.
AMS_LIST_ ROW_ SELECT_ TYPE	System	NTH RECORD RANDOM STANDARD	How to select rows during list generation. Standard is top down selection.
AMS_LIST_ SEGMENT_ STATUS	User	ARCHIVED AVAILABLE CANCELLED DRAFT EXPIRED	Archived Available Cancelled Draft Expired

Key	Type	Values	Meanings
AMS_LIST_ SEGMENT_ TYPE	System	WORKBOOK SQL	Two types of segments supported. Based on a Discoverer workbook or an SQL statement.
AMS_LIST_ SELECTION_ ACTION	System	INCLUDE EXCLUDE INTERSECT	How each selection is added to the list. Exclude means that all entries that exist in the excluded list are removed from the current list. Intersect causes the current list to become a list of only those entries which are on the intersected list and the current list.
AMS_LIST_ SELECTION_ TYPE	System	SEGMENT	Segment
		WORKBOOK	Workbook
		IMPORT LIST	Import List
		LIST	List
		SQL	SQL

Key	Type	Values	Meanings
AMS_LIST_STATUS	System	ARCHIVED	Archived
		AVAILABLE	Available
		CANCELLED	Cancelled
		DRAFT	Draft
		EXECUTED	Executed
		EXECUTING	Executing
		GENERATING	Generating
		LOCKED	Locked
		NEW	New
		PENDING	Pending
		RESERVED	Reserved
		SCHEDULED	Scheduled
		VALIDATED	Validated
		VALIDATING	Validating
		DELETE	Delete
		PURGED	Purged
AMS_LIST_ TYPE	System	MANUAL LIST	List of possible list types. Note where these appear in the program.
		STANDARD LIST	
		SUPPRESSION LIST	
		TARGET GROUP	
AMS_ LUMPSUM_ DISTRIBU-TION_ TYPE	System	%	Percent
		AMT	Amount
		QTY	Quantity
AMS_ MASTER_ OBJECT_ TYPE	System	CAMP	Campaign
		CSCH	Campaign Activity
		EONE	One-Off Event
		EVEH	Event

Key	Type	Values	Meanings
AMS_ MEDIA_ TYPE	System	BROADCAST	Advertising
		DEAL	Deal
		DIRECT_MARKETING	Direct Marketing
		EVENTS	Events
		INTERNET	Web Marketing
		IN_STORE	In Store
		PUBLIC_RELATIONS	Press and Analyst Relations
		TRADE_PROMOTION	Trade Promotions
AMS_ OBJECT_ CLASS	System	INVOICE	Invoice
		ORDER	Order
		ORDER_LINE	Order Line
		PCHO	Purchase Order
AMS_OBJECT_USAGE_TYPE	System	CREATED	Created
		USED_BY	Used By
AMS_OFFER_ DEAL_ CUSTOMER_ TYPES	Extensible	BUYER	Buyer Group
		CUSTOMER	Customer
		LIST	List
		SEGMENT	Segment
AMS_OFFER_ LUMPSUM_ PAYMENT	System	ACCRUE	Accrue
		CHECK	Issue Check

Key	Type	Values	Meanings
AMS_OFFER_ STATUS	System	ACTIVE CLOSED DRAFT REJECTED CLOSED PENDING PENDING_ACTIVE ARCHIVED CANCELLED COMPLETED TERMINATED ONHOLD	Active Closed Draft Budget Rejected Closed Pending budget approval Pending Active Archived Cancelled Completed Terminated On hold
AMS_OFFER_ TYPE	System	OID LUMPSUM ORDER ACCRUAL OFF_INVOICE DEAL TERMS	Promotional Goods Lump sum Order value Accruals Off Invoice Trade Deal Terms Upgrade
AMS_OFFER_LUMP _CUST_ TYPES	System	BUYER CUSTOMER	Buyer Customer
AMS_ PARTNER_ HOLDING_ TYPE (Holding Owner)	System	PTNR VEND	Partner Vendor Only used when Partners Online is implemented.

Key	Type	Values	Meanings
AMS_ PAYMENT_ STATUS	System	INCOMPLETE INTERFACED PAID PENDING	Incomplete Interfaced Paid Pending
AMS_PLCE_ LOCATION_ CODE	Extensible	LEFT1, LEFT2… LEFT7 RIGHT1, RIGHT2 … RIGHT7 TOP BOTTOM	Positions for placements
AMS_PLCE_ SITE_ CATEGORY	System	ORACLE_APPLICATIONS OTHER_APPLICATIONS AFFILIATES	Oracle Applications Other Applications Affiliates
AMS_POST_ AUDIENCE_ TYPE	System	S L	Segment List
AMS_POST_ BUSPRIOR (Business Priority)	System	NONE RANDOM PROD_LIST_ PRICE CAMPAIGN_ START_DATE CAMPAIGN_ END_DATE CAMPAIGN_ PRIORITY	None Random (for all) List Price (for products only) Start Date, End Date, or Priority (for campaign activities).
AMS_POST_ CATEGORY	System	UNIVERSAL RULEBASED	Posting types: Universal or based on a rule.

Key	Type	Values	Meanings
AMS_POST_ CND_DATA_ TYPE	System	FLOAT STRING	Data Types returnable by Custom Condition Class.
AMS_POST_ COMP_ OPERATOR	System	EQ GTE LTE	Equal to Greater than or equal to Less than or equal to Used to compare shopping cart amount.
AMS_POST_ CONTENT_ TYPES	System	PRODUCT OFFER SCHEDULE	Product Web Offer Web Advertisement
AMS_POST_ PREDEF_ PROD_ CONTEXT	System	PROD_VIEWED PROD_IN_CART	The product context for relationship based strategy.
AMS_POST_ RELATION-SHIPS	System	Promoting Relationship Types Not Covered By *i* store	Promoting is a relationship not covered by *i*Store, as in promoting a product.
AMS_POST_ STATUS	System	ACTIVE INACTIVE	-
AMS_POST_ STRATEGY_ TYPE	System	MANUAL_ SELECTION PRODUCT_ RELATIONSHIP INFERRED_OP CUSTOM	Manually selected strategy Strategy based on product relationship Inferred based on Personalization Custom strategy

Key	Type	Values	Meanings
AMS_ PRICE -LIST_ STATUS	System	ACTIVE DRAFT REJECTED PENDING CANCELLED	Active Draft Rejected Pending Budget Approval Cancelled
AMS_PRIOR_ SORT_ ORDER	System	ASC DESC	Ascending Descending
AMS_ PRIORITY	System	FAST_TRACK HIGH STANDARD	Fast Track High Standard
AMS_ PRODUCT_ LEVEL	System	PRODUCT FAMILY	Product Product Family
AMS_ PROGRAM_ OBJECTIVE	User	USER DEFINED	-
AMS_ PROGRAM_ STATUS	System	ACTIVE ARCHIVED CANCELLED COMPLETED NEW ON_HOLD	Active Archived Cancelled Completed New Active, but locked
AMS_QP_ ARITHMETIC _OPERATOR	System	% AMT LUMPSUM NEWPRICE	Percent Amount Lump sum New Price

Key	Type	Values	Meanings
AMS_QP_ VOLUME_ TYPE	System	PRICING_ATTRIBUTE10 PRICING_ATTRIBUTE12	Quantity Amount
AMS_QUARTERS	System	Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4
AMS_ REASON_ CODE_TYPE	User	ADJUST_REASON INVOICING_REASON	Adjustment Reason Invoicing Reason
AMS_ ROLLUP_ TYPE	Extensible	COLL DEAL ECAM EVCAM PARTNER RCAM TRDP	Collection Deal Campaign Event Promotions Partner Program Trade Promotion
AMS_ SCHEDULE_ OBJECTIVE	User	User Defined	-
AMS_ TRANSFER_ REASON	User	SOURCING	Initial Sourcing
AMS_ TRANSFER_ TYPE	Exten-sible	RELEASE RESERVE TRANSFER REQUEST UTILIZED	Release Reserve Transfer Request Utilized

Key	Type	Values	Meanings
AMS_ TRIGGER_ CHK_ METRIC_ TYPE	System	ACTUAL FORECAST	Actual Value Forecast Value
AMS_ TRIGGER_ CHK_TYPE	System	DIWB METRIC STATIC_VALUE	Workbook Metric Static Value
AMS_ TRIGGER_ FREQUENCY_TYPE	System	DAILY HOURLY MONTHLY NONE QUARTERLY WEEKLY YEARLY	The frequency of trigger checking
AMS_ TRIGGER_ TYPE	System	METRIC_METRIC METRIC_VALUE METRIC_ WORKBOOK	Metric to Metric type trigger Metric to Value type trigger Metric to Workbook type trigger
AMS_ UTILIZATION_ TYPE	System	ACCRUAL ADJUSTMENT SALES_ ACCRUAL UTILIZED	Accrual Adjustment Sales Accrual (refers to the salesperson) Utilized

Key	Type	Values	Meanings
AMS_VALUE_ LIMIT	Extensible	BALANCE	Balance
		COMMITTED	Committed
		PAID	Paid
		PLANNED	Planned
		UTILIZED	Utilized
AMS_YEARS	System	1995	1995
		1996	1996
		1997	1997
		1998	1998
		1999	1999
		2000	2000
		2001	2001
		2002	2002
IBE_ RELATION-SHIP_TY PES	Extensible	Possible Relationships Between Products Like Cross Sell, Up Sell.	This is an *i*Store lookup type.
INVENTORY_ ITEM_ STATUS_ CODE	User	ACTIVE	Active
		INACTIVE	Inactive

Key	Type	Values	Meanings
ITEM_TYPE	Extensible	AI	ATO Option Class
		AOC	ATO item
		ATO	ATO model
		CONSULTING	Contracts - consulting
		EDU	Contracts - Education
		FG	Contracts - KIT
		FRT	Contracts - Media
		I	Contracts - Software
		K	License
		KIT	Contracts - Training
		M	Finished good
		MEDIA	Freight
		NRI	Inventory Type
		OC	Kit
		OP	Model
		P	Non-recurring
		PF	Option Class
		PH	Outside Processing Item
		PL	PTO Option Class
		POC	PTO model
		PTO	Phantom item
		REF	Planning
		RI	Product Family
		SA	Purchased Item
		SI	Recurring
		SW LIC	Reference Item
		TRAIN	Subassembly supply item

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Oracle Marketing Request Set and Concurrent Program Reference

This appendix covers the following topics:

- Running Concurrent Programs
- Checking Concurrent Program Status
- Oracle Marketing Request Sets
- Oracle Marketing Concurrent Program Reference

Running Concurrent Programs

Many operational processes for Oracle Marketing require Concurrent Programs to run. They can run on a scheduled basis or on an as required basis. Use the following instructions for running any Oracle Applications concurrent program or program set.

See the *Oracle E-Business Suite Setup Guide* for complete details on the concurrent programs.

To run concurrent programs, log in to Oracle Forms with appropriate responsibility and submit a new request. For Oracle applications concurrent programs, the responsibility varies by module.

Checking Concurrent Program Status

To check the status of a concurrent program, log in to Oracle Forms with System Administrator Responsibility.

Navigation: Concurrent > Request

Notes

- In the Find Request window, search for your concurrent program request.

- If the server is not busy, then selecting Find may be the fastest way to find your request.
- If the server is busy, it may be better to enter search criteria and look for Specific Requests.

- Select Refresh Data occasionally to check the completion status.
- When in the "red" state or Phase = "completed", the "View Output" and "View Log" buttons will become active (if the log output files have been setup correctly).

Oracle Marketing Request Sets

Request sets are sets of concurrent manager programs which may be executed as a group. If desired, any concurrent manager program which is part of a request set may be executed individually.

Oracle Marketing Request Sets

Request Set Name	Concurrent Manager Programs
BIM: Load Marketing Facts for the First Time	BIM: Load Marketing Facts for the First Time, Object to Load: Campaign
	BIM: Load Marketing Facts for the First Time, Object to Load: Event
	BIM: Load Marketing Facts for the First Time, Object to Load: Budget
	BIM: Load Marketing Facts for the First Time, Object to Load: Leads
	BIM: Load Marketing Facts for the First Time, Object to Load: Lead_Import
	BIM: Load Marketing Facts for the First Time, Object to Load: Response
	BIM: Load Key Performance Indicator Facts

Request Set Name	Concurrent Manager Programs
BIM: Initial Build of Materialized Views	BIM: Initial Build of Campaign Materialized Views
	BIM: Initial Build of Event Materialized Views
	BIM: Initial Build of Budget Materialized Views
	BIM: Initial Build of Key Performance Indicators Materialized Views
	BIM: Initial Build of Interaction History Responses Materialized Views
BIM: Refresh Materialized Views	BIM: Refresh Campaign Materialized Views
	BIM: Refresh Event Materialized Views
	BIM: Refresh Budget Materialized Views
	BIM: Refresh Key Performance Indicators Materialized Views
	BIM: Refresh Marketing Activities Materialized Views
	BIM: Refresh of Interaction History Responses Materialized Views
BIM: Refresh Materialized Views - Lead Intelligence	BIM: Refresh Summary by Group Hierarchy Materialized Views
	BIM: Refresh of Lead KPI Materialized Views
	BIM: Refresh of Lead Quality Materialized Views
	BIM: Refresh of Lead Sources Materialized Views
	BIM: Refresh of Lead Import Materialized Views
	BIM: Refresh of Responses Materialized Views

Request Set Name	Concurrent Manager Programs
BIM: Load Marketing Facts from Previous Refresh Date	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Campaign
	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Event
	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Budget
	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Leads
	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Lead_Import
	BIM: Load Marketing Facts from Previous Refresh Date, Object to Load: Response
	BIM: Load Key Performance Indicator Facts from Previous Refresh Date

Oracle Marketing Concurrent Program Reference

The table below indicates the Concurrent Manager programs for Oracle Marketing.

Oracle Marketing Concurrent Manager Programs

Concurrent Manager	Required	Description
Activate Event Schedules	Yes	This will pick up all the Event Schedules which are in Available status and for which the start date has passed and its Event is active and make the Schedule Active. For Events, run the program **Activate Event Schedules**. This program accomplishes two things: • **Activates Events:** This program activates available event schedules and one-off events for which the start date has passed. • **Completes Events:** Picks up and completes event schedules and one-off events for which the end date has passed.
AMS Activate Schedule	Optional	This will pick up all the Campaign Activities which are in Available status and for which the start date has passed and its Campaign is active and make the Schedule Active.

Concurrent Manager	Required	Description
AMS: Complete Campaign Activities	Optional	This program accomplishes the following: • Picks up available schedules with a start date of today (or, a start date that has already passed) and activates them. • Picks up active schedules with an end date of today (or, an end that has passed) and completes them.
AMS Expire Data Mining Models	Yes	Background process that monitors data mining models to see if they have expired. A frequency of once a day should be sufficient.
AMS: Generate Suppression list	Optional	Updates and maintains organization defined suppression lists. This is in addition to seeded suppression lists.
AMS Group Access Refresh	Yes	Updates denormalized tables with group information. Should be run on a periodic basis according the organization's Business Rules.
AMS Web Execution: Specialty Store Items Refresh Program	Yes	Refreshes the denormalized table for minisites periodically to capture items in the *i*Store minisites.

Concurrent Manager	Required	Description
AMS Web Execution: Campaign Items Refresh Program	Yes	Information about Campaigns is stored in multiple tables. To improve runtime performance, this program periodically collects required information on campaigns and places it into a single table.
OZF - TM: Refresh Trade Management Activities (Offers and Schedules)	Required if using Offers and Web Posting	This program populates denormalized tables with up-to-date information of new and changed Offers and Schedules. Both the Activity Summary and Offer Evaluator data is current as of the last time this concurrent program was run. The Oracle Marketing Offers functionality will retrieve the Eligible Offers for Products depending on Qualifying parties.
AMS Load Inventory Categories	Yes	Loads categories from the MTL schema to the AMS schema denormalized tables. This program should be run if and when a new category is created in Inventory.
AMS : Interface Marketing Objects to Calendar	Yes	Before the new object or criteria will display on the Marketing Calendar, you must run the concurrent program This program is a workflow background process and will update the Calendar as needed.

Concurrent Manager	Required	Description
Load Catalog Hierarchy	Yes	Next, run **Load Catalog Hierarchy** from the Catalog Manager responsibility. This enables categories defined for Products to be visible to the Marketing applications. Only categories with the following parameters will be pulled into this view: • FORECASTABLE_FLAG = Y • PURCHASE_INTEREST = Y

Concurrent Manager	Required	Description
AMS Refresh Metrics	-	Use this request set for updating bin and graph data in the Campaign and Audience Workbenches: • Campaign Effectiveness Bin • List Effectiveness Bin • Trend Graphs It is recommended that you schedule this request set to run daily -- it has two concurrent programs: • **AMS METRICS REFRESH program**Enter "Yes" in parameter to collect history. Recording history is required for support of Business Intelligence for Marketing (BIM) • **AMS METRICS DENORM REFRESH program**If "Yes" is entered in parameter , the program will be run in incremental mode. For example, just update mvs for the data updated since last time.
AMS Portal Cache Daemon	Yes	Populates the Marketing subtab on the Home tab.

Concurrent Manager	Required	Description
AMS: Purge Imported List	Optional	During the import process, the user may specify an expiration date or number of uses for a list. This program removes those entries whose expiration date has passed or number of uses reached. Optional Parameter: force_purge_flag. This parameter indicates whether to purge a record regardless of the associated campaign status. The default value is No.
AMS: Purge Target Group and List Entries	Optional	After a target group has been generated and used, this program lets a user purge the list entries.
AMS: Refresh Party Market Segments	Optional	Generates a list of parties in the segment. This program also updates the size information for all segments so a history of segment sizes may be maintained.
AMS Team Access Refresh	Yes	Updates denormalized tables with team information. Should be run on a periodic basis according to the organization's Business Rules.
AMS-TM: Adjust Backdated Offer	Yes	Concurrent program to adjust backdated offers. This should be run after running the AMS-TM: Funds Accrual Engine concurrent program.

Concurrent Manager	Required	Description
AMS-TM: Funds Accrual Engine	Yes	Ability to calculate budget utilization and earnings based on ship confirmed orders (provided the offer's phase is set to 'Ship', else the accruals will be calculated at the phase the offer is applied). In case of Fully Accrued type of Budgets with accrue to is 'customer', Budget, Committed and Earned columns are to be updated with the accrued amount. But in case of budgets with accrue to 'Sales', only Budget column will have to be updated. Committed and Earned should not be populated. This allows users to transfer money from Fully accrued budget to any other Fixed Budgets. If max cap is specified against the Fully accrued budget, the budget can be accumulated only to the level of max cap. Parameters: p_run_exception. Set to Y to run Order Management Except Queue.
AMS-TM: Import Territory Hierarchy	Yes	This concurrent program uploads the hierarchy data from jtf_territories to AMS schema to be able to perform budget allocation to that territory hierarchy. The concurrent program expects a hierarchy id meaning which particular hierarchy the user wants to import. Parameters: Hierarchy Id

Concurrent Manager	Required	Description
AMS-TM: Release Committed Budget Amount After Grace Period	Yes	A budget has been committed for an offer or any other activity. The Activity or offer date has ended or the offer is going to be closed or canceled. There might be a situation that the budget has not been utilized completely. This feature can be implemented through a concurrent process would return back the unused committed amount back to the sourcing budget. If there is a grace period, release of committed amount from a fixed type fund would take place whenever a offer is closed or canceled after the attainment of the grace period. Parameters: p_object_type (Object Type, for example, CAMP, OFFR, EVEH)
AMS-TM: Validate Budget Thresholds	Yes	Threshold Alert provides the feature to monitor over spending or under spending from time to time. The concurrent program performs the automatic process of verification and notifies the owner of the budget on over & under utilization. Parameters: None

Concurrent Manager	Required	Description
AMS-TM Utilize Lumpsum Offers	Yes	A user initiated background process that will account budget utilizations against lumpsum offer whenever the offer start date arrives rather than on offer approved or created date. In case when the Offer is active on the date when Offer was created, then the budget utilization will be updated immediately.
AMS-TM: Claims Aging Population	Yes	Claims aging program populates the summary table for the claims aged by customer for an aging bucket. Aging will be run based on the system date. This program has to be run on a daily basis to get the daily aging analysis for the customers. Claims may be aged using a future type. This type will display claims that will become due, based on the Due Date, the specified number of days in the future. Parameter: Aging bucket defined in Oracle Receivables

Concurrent Manager	Required	Description
AMS-TM: Claims Autopay	Yes	Autopay program is used to pay accruals on a regular basis to customers. Autopay can be set up to pay accruals based on a customer, budget, campaign or offer. Parameters: • Customer • Budget • Offer • Campaign
AMS-TM: Claims Settlement Fetcher	Yes	Settlement fetcher gets the settlement data created in receivables and payables after settling a claim. Claim settlement on a manual claims gets created through autoinvoice or payables invoice import. These are programs which run on a batch mode and after the actual payment gets created in receivables or payables, settlement fetcher has to be run to get the settlement data to be shown in claims. Parameters: None
AMS-TM: Import Claims	Yes	Import Claims imports the data from interface tables into claims. This program runs through the standard validations for claims creation and rejects the claims that are not successful for import. Parameters: None

Concurrent Manager	Required	Description
AMS-TM: Perform Recalculated Commitment for Offers	Optional	Performs recalculation of committed budget for offers.
AMS-TM: Transfer to General Ledger	Yes	Transfer to General Ledger is run to transfer the sub-ledger accounting entries created by claims/accruals into General Ledger accounting tables. Parameters: • Selection Type (1-Batch Transfer) • Set Of Books - Primary set of books • Transfer Reporting Books - Yes/No • Batch Name - Name of batch for transfer
AMS Update Data Mining Models	Optional	Updates detail information collected on parties. The frequency should be the same as the BIC Summary Extraction process.
AMS Web Execution: Specialty Store Items Refresh Program	Yes	This refreshes the denormalized table for minisites periodically to capture items in the *i*Store minisites.
AMS Web Execution: Campaign Items Refresh Program	Yes	Information about Campaigns is stored in multiple tables. To improve runtime performance, this program periodically collects required information on campaigns and places it into a single table.

Concurrent Manager	Required	Description
OZF: Refresh Trade Management Activities (Offers and Schedules)	Yes	-
AutoInvoice - Oracle Receivables	Yes	AutoInvoice is an Oracle Receivables concurrent program used to create credit memos/debit memos in receivables. It is used for creating credit memos on settling manual claims. Claims settled with receivables payment method gets created with the batch source defined in system parameters. For more information on parameters and options see *Oracle Receivables Implementation Guide*.
BIM: Load Marketing Facts for the First Time	Optional	Loads all Facts for the first time. Repeat for each object: Campaign, Event, Budget, Leads, Lead Import and Response. Parameters: Start Date End Date Part of the Request Set: BIM: Load Marketing Facts for the First Time

Concurrent Manager	Required	Description
BIM: Load Marketing Facts from the Previous Refresh Date	Optional	Loads all Facts from the Previous Refresh Date. Repeat for each object: Campaign, Event, Budget, Leads, Lead Import and Response. Parameters: Start Date End Date Part of the Request Set: BIM: Load Marketing Facts from the Previous Refresh Date
BIM: Load Key Performance Indicator Facts	Optional	Loads KPI Facts. Part of the Request Set: BIM: Load Marketing Facts for the First Time
BIM: Initial build of Campaigns Materialized Views	Optional	Prepares pre-built tables for Campaign Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views
BIM: Initial build of Events Materialized Views	Optional	Prepares pre-built tables for Events Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views

Concurrent Manager	Required	Description
BIM: Initial build of Budgets Materialized Views	Optional	Prepares pre-built tables for Budgets Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views
BIM: Initial build of Interaction History Materialized Views	Optional	Prepares pre-built tables for Interaction History Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views
BIM: Initial build of Key Performance Indicators Materialized Views	Optional	Prepares pre-built tables for Key Performance Indicators Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Initial build of Materialized Views
BIM: Initial build of Leads Quality Materialized Views	Optional	Prepares pre-built tables for Leads Quality Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence

Concurrent Manager	Required	Description
BIM: Initial build of Leads Sources Materialized Views	Optional	Prepares pre-built tables for Leads Sources Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence
BIM: Initial build of Lead Import Materialized Views	Optional	Prepares pre-built tables for Lead Import Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence
BIM: Initial build of Responses Materialized Views	Optional	Prepares pre-built tables for Responses Materialized Views Part of the Request Set: BIM: Initial build of Materialized Views - Lead Intelligence
BIM: Refresh Campaign Materialized Views	Optional	Builds Campaigns Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of Materialized Views
BIM: Refresh Events Materialized Views	Optional	Builds Events Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of Materialized Views

Concurrent Manager	Required	Description
BIM: Refresh Budgets Materialized Views	Optional	Builds Budgets Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of Materialized Views
BIM: Refresh of Interaction History Materialized Views	Optional	Builds Interaction History Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of Materialized Views
BIM: Refresh Key Performance Indicators Materialized Views	Optional	Builds Key Performance Indicators Materialized views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of Materialized Views
BIM: Refresh Marketing Activities Materialized Views	Optional	Builds Marketing Activities Materialized Views Parameters: Number of Parallel Processors: 4 Part of the Request Set: BIM: Refresh of Materialized Views

Concurrent Manager	Required	Description
BIM: Refresh of Summary by Group Hierarchy	Optional	Builds summarized tables based on group hierarchy. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Leads KPI Materialized Views	Optional	Builds Leads KPI Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Leads Quality Materialized Views	Optional	Builds Leads Quality Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Leads Sources Materialized Views	Optional	Builds Leads Sources Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Lead Import Materialized Views	Optional	Builds Lead Import Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence
BIM: Refresh of Responses Materialized Views	Optional	Builds Responses Materialized Views. Part of the Request Set: BIM: Refresh of Materialized Views - Lead Intelligence

Concurrent Manager	Required	Description
BIM: Load Marketing Facts from previous refresh date	Optional	Loads all facts from the previous refresh date. Repeat for each object: Campaign, Event, Budget. Parameters: Object to Load: Campaign End Date Number of Parallel Processors: 4 Part of the Request Set: Load Marketing Facts from previous refresh date
BIM: Load Key Performance Indicator facts from previous refresh date	Optional	Loads all KPI facts from the previous refresh Date.
Initial Build of Campaigns mvs	-	Replaced by BIM: Initial Build of Campaigns Materialized Views.
Initial Build of Events mvs	-	Replaced by BIM: Initial Build of Events Materialized Views.
Initial Build of Funds mvs	-	Replaced by BIM: Initial Build of Budgets Materialized Views.
Load Geographic Hierarchies	Yes	This program must be run each time that the geographies are changed.
Marketing Facts Load	-	Replaced by BIM: Load Marketing Facts for the First Time.
Marketing Materialized views prebuilt tables (AMS)	-	Replaced by BIM: Initial Build of Materialized Views

Concurrent Manager	Required	Description
Marketing Materialized views Refresh (AMS)	-	Replaced by BIM: Refresh Materialized Views
Payables Open Interface Import - Oracle Payables	Yes	Payables open interface import is an Oracle Payables concurrent program used to create invoices in payables. It has to be run for the batch source defined in system parameters since all the claims settlement for payables get created with that batch source. For more information on parameters and options see *Oracle Payables Implementation Guide.*
Refresh of Campaigns mvs	-	Replaced by BIM: Refresh Campaigns Materialized Views.
Refresh of Events mvs	-	Replaced by BIM: Refresh Events Materialized Views.
Refresh of Funds mvs	-	Replaced by BIM: Refresh Budgets Materialized Views.

Concurrent Manager	Required	Description
Workflow Background Process	Required	The System Administrator must run this program. For lists purposes, this background process makes a list active. It populates List generation and target group generation data. For **list generation**, it requires the following parameters: • Item Type: AMS List Generation • Yes Process Timeout : yes • Process Stuck: yes • Ignore Minimum and Maximum Thresholds For **data mining**, this process must be run with the following parameters: • Item Type: AMS Data Mining - Build/Score/Preview • Minimum Threshold: Leave blank. • Maximum Threshold: Leave blank. • Process Deferred: Yes • Process Timeout: Yes • Process Stuck: Yes For the Workflow daemon to monitor data mining workflow requests, a frequency of 30 minutes should be

Concurrent Manager	Required	Description
		sufficient. For budget approval purposes, the workflow background process must run with the following parameters: • Set Item Type: AMS Marketing Approvals • Minimum Threshold: Leave blank. • Maximum Threshold: Leave blank. • Process Deferred: Yes • Process Timeout: Yes

Concurrent Manager	Required	Description
Trigger Workflow Process	Yes	The Trigger Workflow process is associated with an item type called OMO Triggers. This item type identifies all workflow processes that are needed to enable the Marketing Trigger functionality. Currently there are four different processes in the OMO Triggers item type: Trigger Process: The main process -- getting run as a subscription to the Workflow Business Event OMO Trigger Event (oracle.apps.ams.trigger.TriggerEvent). The following processes are sub flows of this main process flow. – Perform All Actions – Execute Schedule – Schedule Approval
AMS: Schedules Import	-	This executes when the Web ADI Import process is launched.
AMS: Export and Update Schedule	-	This executes when the Web ADI Update process is launched.

Concurrent Manager	Required	Description
AMS: Media Planner Loader	-	This executes when the Schedule Media Planner layout is used to map metrics data from the interface table to schedule metrics. If metrics already exist for the schedule, the metric values are updated. If the metrics do not exist, new metrics are created for the schedule
AMS: Delete List Entries	-	This executes when the Oracle Marketing Administrator runs this concurrent program from the Forms user interface.

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Oracle Marketing List Import Field Reference

This appendix covers the following topics:

- B2B List Import Fields
- B2C List Import Fields
- Event List Import Fields
- Lead List Import Fields

B2B List Import Fields

The following sections describe the fields which can be used in list import. There are four sections B2B List Import, B2C List Import, Event Import and Lead Import.

B2B List Import Fields

Field in Import File	Data Type	Table Name	Import Requires Entry	Column Name
ADDRESS LINES PHONETIC	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS LINES PHONETIC
ADDRESS1	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS1
ADDRESS2	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS2

ADDRESS3	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS3
ADDRESS4	VARCHAR2(150)	HZ_LOCATIONS	No	ADDRESS4
ANALYSIS_FY	VARCHAR2	HZ_ORGANIZATION_PROFILES	No	ANALYSIS_FY
CATEGORY CODE	VARCHAR2	HZ_PARTIES	No	CATEGORY CODE
CEO NAME	VARCHAR2(50)	HZ_ORGANIZATION_PROFILES	No	CEO NAME
CITY	VARCHAR2(60)	HZ_LOCATIONS	No	CITY
COUNTRY	VARCHAR2(60)	HZ_LOCATIONS	No	COUNTRY
COUNTY	VARCHAR2(60)	HZ_LOCATIONS	No	-
'COUNTRY'	-	-	-	-
CREATED BY	NUMBER	HZ_PARTIES	No	CREATED BY
CREATION DATE	DATE	HZ_PARTIES	No	CREATION DATE
CURR FY POTENTIAL REVENUE	NUMBER	HZ_ORGANIZATION_PROFILES	No	CURR FY POTENTIAL REVENUE
DECISION MAKER FLAG	VARCHAR2(1)	HZ_ORG_CONTACTS	No	DECISION MAKER FLAG
DEDUPE KEY	VARCHAR2(150)	HZ_PARTIES	No	DEDUPE KEY

DEPARTMENT	VARCHAR2(60)	HZ_ORG_CONTACTS	No		DEPARTMENT
DUNS NUMBER	NUMBER	HZ_ORGANIZATION_PROFILES	No		DUNS NUMBER
EMAIL ADDRESS	VARCHAR2(150)	HZ_CONTACT_POINTS	No		EMAIL ADDRESS
EMPLOYEES TOTAL	NUMBER	HZ_ORGANIZATION_PROFILES	No		EMPLOYEES TOTAL
FISCAL YEAREND MONTH	VARCHAR2(30)	HZ_PARTIES	No		FISCAL YEAREND MONTH
FLOOR	VARCHAR2	HZ_LOCATIONS	No		FLOOR
GSA INDICATOR FLAG	VARCHAR2	HZ_PARTIES	No		GSA INDICATOR FLAG
HOUSE NUMBER	VARCHAR2	HZ_LOCATIONS	No		HOUSE NUMBER
IMPORT LIST HEADER ID	NUMBER	AMS_IMP_SOURCE_LINES	No		IMPORT LIST HEADER ID
IMPORT SOURCE LINE ID	NUMBER	AMS_IMP_SOURCE_LINES	No		IMPORT SOURCE LINE ID
JGZZ FISCAL CODE	VARCHAR2	HZ_PARTIES	No		JGZZ FISCAL CODE
JOB TITLE	VARCHAR2(60)	HZ_ORG_CONTACTS	No		JOB TITLE
LAST UPDATE DATE	DATE	AMS_IMP_SOURCE_LINES	No		LAST UPDATE DATE

LAST UPDATE LOGIN	NUMBER	AMS_IMP_SOURCE_LINES	No	LAST UPDATE LOGIN
LAST UPDATED BY	NUMBER	AMS_IMP_SOURCE_LINES	No	LAST UPDATED BY
LEGAL STATUS	VARCHAR2(30)	HZ_PARTIES	No	LEGAL STATUS
LINE OF BUSINESS	VARCHAR2(30)	HZ_PARTIES	No	LINE OF BUSINESS
MISSING STATEMENT	VARCHAR2	HZ_PARTIES	No	MISSING STATEMENT
NEXT FY POTENTIAL REVENUE	NUMBER	HZ_PARTIES	No	NEXT FY POTENTIAL REVENUE
NOTES	VARCHAR2(4000)	AMS_IMP_SOURCE_LINES	No	NOTES
ORGANIZATION NAME PHONETIC	VARCHAR2	HZ_PARTIES	No	ORGANIZATION NAME PHONETIC
PARTY NAME	VARCHAR2(150)	HZ_PARTIES	Yes	PARTY NAME
PERSON FIRST NAME	VARCHAR2(150)	HZ_PARTIES	No	PERSON FIRST NAME
PERSON LAST NAME	VARCHAR2(150)	HZ_PARTIES	No	PERSON LAST NAME
PERSON MIDDLE NAME	VARCHAR2(60)	HZ_PARTIES	No	PERSON MIDDLE NAME
PERSON NAME SUFFIX	VARCHAR2(30)	HZ_PARTIES	No	PERSON NAME SUFFIX
PERSON TITLE	VARCHAR2(60)	HZ_PARTIES	No	PERSON TITLE
PHONE AREA CODE	VARCHAR2(10)	HZ_CONTACT_POINTS	No	PHONE AREA CODE

PHONE COUNTRY CODE	VARCHAR2(10)	HZ_CONTACT_POINTS	No		PHONE COUNTRY CODE
PHONE EXTENTION	VARCHAR2(20)	HZ_CONTACT_POINTS	No		PHONE EXTENTION
PHONE NUMBER	VARCHAR2(40)	HZ_CONTACT_POINTS	No		PHONE NUMBER
PO BOX NUMBER	-	HZ_LOCATIONS	No		PO BOX NUMBER
POSTAL CODE	VARCHAR2(60)	HZ_LOCATIONS	No		POSTAL CODE
POSTAL PLUS4 CODE	-	HZ_LOCATIONS	No		POSTAL PLUS4 CODE
PROVINCE	VARCHAR2(60)	HZ_LOCATIONS	No		PROVINCE
SALES AGENT LOGIN ID	VARCHAR2(2000)	AMS_IMP_SOURCE_LINES	No		SALES AGENT LOGIN ID
SIC CODE	VARCHAR2	HZ_ORGANIZATION_PROFILES	No		SIC CODE
SIC CODE TYPE	VARCHAR2	HZ_ORGANIZATION_PROFILES	No		SIC CODE TYPE
SITE USE TYPE	VARCHAR2	HZ_ORGANIZATION_PROFILES	No		SITE USE TYPE
STATE	VARCHAR2(60)	HZ_LOCATIONS	No		STATE
STATE					
STREET	VARCHAR2	HZ_LOCATIONS	No		STREET

STREET NUMBER	VARCHAR2	HZ_LOCATIONS	No	STREET NUMBER
STREET SUFFIX	VARCHAR2	HZ_LOCATIONS	No	STREET SUFFIX
SUITE	VARCHAR2	HZ_LOCATIONS	No	SUITE
TAX REFERENCE	VARCHAR2(50)	HZ_PARTIES	No	TAX REFERENCE
VEHICLE REPONSE CODE	VARCHAR2(30)	AMS_IMP_SOURCE_LINES	No	VEHICLE REPONSE CODE
YEAR ESTABLISHED	NUMBER(4)	HZ_PARTIES	No	YEAR ESTABLISHED
ADDRESS EFFECTIVE DATE	DATE	HZ_LOCATIONS	-	ADDRESS EFFECTIVE DATE
ADDRESS EXPIRATION DATE	DATE	HZ_LOCATIONS	-	ADDRESS EXPIRATION DATE
BRANCH FLAG	VARCHAR	HZ_ORGANIZATION_PROFILES	-	BRANCH FLAG
BUSINESS LINE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	BUSINESS LINE
BUSINESS SCOPE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	BUSINESS SCOPE
CHIEF EXECUTIVE TITLE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	CHIEF EXECUTIVE TITLE

CONGRESSIONAL DISTRICT CODE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	CONGRESSIONAL DISTRICT CODE
CONTROL YEAR	NUMBER	HZ_ORGANIZATION_PROFILES	-	CONTROL YEAR
CORPORATION CLASS	VARCHAR	HZ_ORGANIZATION_PROFILES	-	CORPORATION CLASS
CREDIT SCORE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	CREDIT SCORE
CREDIT SCORE COMMENTARY	VARCHAR	HZ_ORGANIZATION_PROFILES	-	CREDIT SCORE COMMENTARY
DB RATING	VARCHAR	HZ_ORGANIZATION_PROFILES	-	DB RATING
DATE OF BIRTH	DATE	HZ_PERSON_PROFILES	-	DATE OF BIRTH
DATE OF DEATH	DATE	HZ_PERSON_PROFILES	-	DATE OF DEATH
DEBARMENTS COUNT	NUMBER	HZ_ORGANIZATION_PROFILES	-	DEBARMENTS COUNT
DEBARTMENTS DATE	DATE	HZ_ORGANIZATION_PROFILES	-	DEBARTMENTS DATE
DECLARED ETHNICITY	VARCHAR	HZ_PERSON_PROFILES	-	DECLARED ETHNICITY
DEBARTMENT INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	DEBARTMENT INDICATOR

DESCRIPTION	VARCHAR	HZ_LOCATIONS	-	DESCRIPTION
DISADVANTAGED INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	DISADVANTAGED INDICATOR
ENQUIRY DUNS	VARCHAR	HZ_ORGANIZATION_PROFILES	-	ENQUIRY DUNS
EXPORT INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	EXPORT INDICATOR
FAILURE SCORE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	FAILURE SCORE
FAILURE SCORE COMMENTARY	VARCHAR	HZ_ORGANIZATION_PROFILES	-	FAILURE SCORE COMMENTARY
FAILURE SCORE NATL PERCENTILE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	FAILURE SCORE NATL PERCENTILE
FAILURE SCORE OVERRIDE CODE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	FAILURE SCORE OVERRIDE CODE
FISCAL CODE	VARCHAR	HZ_PARTIES	-	FISCAL CODE
GLOBAL FAILURE SCORE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	GLOBAL FAILURE SCORE
HEADQUARTER BRANCH INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	HEADQUARTER BRANCH INDICATOR
HEAD OF HOUSEHOLD FLAG	VARCHAR	HZ_PERSON_PROFILES	-	HEAD OF HOUSEHOLD FLAG

HOUSEHOLD SIZE	VARCHAR	HZ_PERSON_PROFILES	-	HOUSEHOLD SIZE
IMPORT INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	IMPORT INDICATOR
ORGANIZATION KNOWN AS	VARCHAR	HZ_PARTIES	-	ORGANIZATION KNOWN AS
ORGANIZATION KNOWN AS2	VARCHAR	HZ_PARTIES	-	ORGANIZATION KNOWN AS2
ORGANIZATION KNOWN AS3	VARCHAR	HZ_PARTIES	-	ORGANIZATION KNOWN AS3
ORGANIZATION KNOWN AS4	VARCHAR	HZ_PARTIES	-	ORGANIZATION KNOWN AS4
ORGANIZATION KNOWN AS5	VARCHAR	HZ_PARTIES	-	ORGANIZATION KNOWN AS5
PERSON KNOWN AS	VARCHAR	HZ_PARTIES	-	PERSON KNOWN AS
PERSON KNOWN AS2	VARCHAR	HZ_PARTIES	-	PERSON KNOWN AS2
PERSON KNOWN AS3	VARCHAR	HZ_PARTIES	-	PERSON KNOWN AS3
PERSON KNOWN AS4	VARCHAR	HZ_PARTIES	-	PERSON KNOWN AS4
PERSON KNOWN AS5	VARCHAR	HZ_PARTIES	-	PERSON KNOWN AS5
LABOR SURPLUS INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	LABOR SURPLUS INDICATOR
LOCAL ACTIVITY CODE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	LOCAL ACTIVITY CODE

LOCAL ACTIVITY CODE TYPE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	LOCAL ACTIVITY CODE TYPE
LOCATION DIRECTIONS	VARCHAR	HZ_LOCATIONS	-	LOCATION DIRECTIONS
LOCATION STATUS	VARCHAR	HZ_LOCATIONS	-	LOCATION STATUS
MARITAL STATUS	VARCHAR	HZ_PERSON_PROFILES	-	MARITAL STATUS
MARITAL STATUS EFFECTIVE DATE	DATE	HZ_PERSON_PROFILES	-	MARITAL STATUS EFFECTIVE DATE
MINORITY OWNED INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	MINORITY OWNED INDICATOR
MINORITY OWNED TYPE	VARCHAR	HZ_ORGANIZATION_PROFILES	-	MINORITY OWNED TYPE
ORGANIZATION ALIAS	VARCHAR	HZ_PARTIES	-	ORGANIZATION ALIAS
ORGANIZATION TYPE	VARCHAR	HZ_PARTIES	-	ORGANIZATION TYPE
ORGANIZATION URL	VARCHAR	HZ_PARTIES	-	ORGANIZATION URL
OUT OF BUSINESS INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	OUT OF BUSINESS INDICATOR
PERSONAL INCOME	NUMBER	HZ_PERSON_PROFILES	-	PERSONAL INCOME
PERSON ACADEMIC TITLE	VARCHAR	HZ_PERSON_PROFILES	-	PERSON ACADEMIC TITLE

PERSON FIRST NAME PHONETIC	VARCHAR	HZ_PARTIES	-	PERSON FIRST NAME PHONETIC
PERSON LAST NAME PHONETIC	VARCHAR	HZ_PARTIES	-	PERSON LAST NAME PHONETIC
MIDDLE NAME PHONETIC	VARCHAR	HZ_PARTIES	-	MIDDLE NAME PHONETIC
PERSON NAME PHONETIC	VARCHAR	HZ_PARTIES	-	PERSON NAME PHONETIC
PERSON PREVIOUS TITLE NAME	VARCHAR	HZ_PARTIES	-	PERSON PREVIOUS TITLE NAME
PLACE OF BIRTH	VARCHAR	HZ_PERSON_P ROFILES	-	PLACE OF BIRTH
PRINCIPAL NAME	VARCHAR	HZ_ORGANIZA TION_PROFILE S	-	PRINCIPAL NAME
PRINCIPAL TITLE	VARCHAR	HZ_ORGANIZA TION_PROFILE S	-	PRINCIPAL TITLE
PUBLIC PRIVATE OWNERSHIP FLAG	VARCHAR	HZ_ORGANIZA TION_PROFILE S	-	OWNERSHIP FLAG
RENT OWNED INDICATOR	VARCHAR	HZ_PERSON_P ROFILES	-	RENT OWNED INDICATOR
SECOND TITLE	VARCHAR	HZ_PERSON_P ROFILES	-	PERSON ACADEMIC TITLE
SHORT DESCRIPTION	VARCHAR	HZ_LOCATION S	-	SHORT DESCRIPTION

SMALL BUSINESS INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	SMALL BUSINESS INDICATOR
TAX ID	VARCHAR	HZ_PERSON_PROFILES	-	TAX REFERENCE
WOMAN OWNED INDICATOR	VARCHAR	HZ_ORGANIZATION_PROFILES	-	WOMAN OWNED INDICATOR
ORGANIZATION ATTRIBUTE 1 - 15	VARCHAR	HZ_ORGANIZATION_PROFILES	-	ATTRIBUTE 1-15
ORG CONTACT ATTRIBUTE 1-15	VARCHAR	HZ_ORG_CONTACTS	-	ATTRIBUTE 1-15
ADDRESS ATTRIBUTE1-15	VARCHAR	HZ_LOCATIONS	-	ATTRIBUTE1-15
FAX COUNTRY CODE	VARCHAR	HZ_CONTACT_POINTS	-	FAX COUNTRY CODE
FAX AREA CODE	VARCHAR	HZ_CONTACT_POINTS	-	FAX AREA CODE
FAX NUMBER	VARCHAR	HZ_CONTACT_POINTS	-	FAX NUMBER
ORG ATTRIBUTE CATEGORY	VARCHAR	HZ_ORGANIZATION_PROFILES	-	ORG ATTRIBUTE CATEGORY
ORG CONTACT ATTRIBUTE CATEGORY	VARCHAR	HZ_ORG_CONTACTS	-	ORG CONTACT ATTRIBUTE CATEGORY
ADDRESS ATTRIBUTE CATEGORY	VARCHAR	HZ_LOCATIONS	-	ADDRESS ATTRIBUTE CATEGORY

PARTY SITE USE	VARCHAR	HZ_PARTY_SITE_USES	-		PARTY SITE USE
ORIGINAL SYSTEM REFERENCE	VARCHAR	HZ_PARTIES	-		ORIG SYSTEM REFERENCE

B2C List Import Fields

The following table indicates B2C List Import Fields.

B2C List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ADDRESS_LINES_PHONETIC	VARCHAR2	No	No	-	-
ADDRESS1	VARCHAR2(150)	No	No	-	Required every time if address is required.
ADDRESS2	VARCHAR2(150)	No	No	-	-
ADDRESS3	VARCHAR2	No	No	-	-
ADDRESS4	VARCHAR2	No	No	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
CITY	VARCHAR2(60)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'CITY'	-
COUNTRY	VARCHAR2(60)	No	No	Select territory_short_name, territory_code, description from fnd_territories_vl	Required only if any of address columns are provided in the data file.
COUNTY	VARCHAR2(60)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'COUNTRY'	-
CREATED_BY	NUMBER	Yes	No	-	Populated by the list import program.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
CREATION_DATE	DATE	Yes	No	-	Populated by the list import program.
DEDUPE_KEY	VARCHAR2(150)	No	No	-	Populated by the list import program.
EMAIL_ADDRESS	VARCHAR2(150)	No	No	-	-
FLOOR		No	No	-	-
GENDER	VARCHAR2(30)	No	No	-	-
HOUSE_NUMBER		No	No	-	-
HOUSEHOLD_INCOME	NUMBER	No	No	-	-
IMPORT_LIST_HEADER_ID	NUMBER	Yes	No	-	Auto Generated
IMPORT_SOURCE_LINE_ID	NUMBER	Yes	No	-	Auto Generated
IMPORT_SUCCESSFUL_FLAG	VARCHAR2(1)	No	No	-	
LAST_UPDATE_DATE	DATE	Yes	No	-	Populated by the list import program.

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LAST_UPDATE_LOGIN	NUMBER	Yes	No	-	Populated by the list import program.
LAST_UPDATED_BY	NUMBER	Yes	No	-	Populated by the list import program.
NOTES	VARCHAR2(4000)	No	No	-	-
OBJECT_VERSION_NUMBER	NUMBER	Yes	No	-	Populated by the list import program.
PERSON_FIRST_NAME	VARCHAR2(150)	No	Yes	-	This is a required column in the data file for B2C type of data
PERSON_LAST_NAME	VARCHAR2(150)	No	Yes	-	This is a required column in the data file for B2C type of data
PERSON_MIDDLE_NAME	VARCHAR2(60)	No	No	-	-
PERSON_NAME_SUFFIX	VARCHAR2(30)	No	No	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PERSON_PRE_NAME_ADJUNCT		No	No	-	-
PERSON_TITLE	VARCHAR2(60)	No	No	-	-
PHONE_AREA_CODE	VARCHAR2(10)	No	No	-	-
PHONE_COUNTRY_CODE	VARCHAR2(10)	No	No	-	-
PHONE_EXTENTION	VARCHAR2(20)	No	No	-	-
PHONE_NUMBER	VARCHAR2(40)	No	No	-	Required if any of the phone information is provided.
PO_BOX_NUMBER	VARCHAR2	No	No	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
POSTAL_CODE	VARCHAR2(60)	No	No	Select min(p.from_postal_code), Max(p.to_postal_code) from Ar_postal_code_ranges_v p, Ar_location_values a where p.location_segment_id = a.location_segment_id and a.location_segment_qualifier = 'CITY' and a.location_segment_value like 'X%'	-
POSTAL_PLUS4_CODE		No	No	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PROVINCE	VARCHAR2(60)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'PROVINCE'	-
SALES_AGENT_LOGIN_ID	VARCHAR2(2000)	No	No	-	-
SALUTATION	VARCHAR2	No	No	-	-
SITE_USE_TYPE	VARCHAR2	No	No	-	-
STATE	VARCHAR2(60)	No	No	Select distinct location_segment_description, location_segment_user_value from ar_location_values where location_segment_qualifier = 'STATE'	-
STREET	VARCHAR2	No	No	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
STREET_NUMBER	VARCHAR2	No	No	-	-
STREET_SUFFIX	VARCHAR2	No	No	-	-
SUITE	VARCHAR2	No	No	-	-
VEHICLE_RESPONSE_CODE	VARCHAR2(30)	No	No	-	Based on lookup AMS_Vehicle_Response_Code

Event List Import Fields

Following table shows the mapping for Event registration import. Note that only Event Source code is a required field. But many other fields are conditionally required.

1. If the Party ID and Contact ID are provided in the csv file, the import will not create party but will use the ids provided in the csv and register them.

2. If the Party ID and Contact ID are not provided, then registrant first name, last name and email address are required as the import program will use those fields to create the party and register them. If the Attendant first name, last name and email address are not provided in the csv file, the import program will use the details from the registrant fields for attendant information.

Event List Import Fields

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
EVENT_SOURCE_CODE/ Event Source Code Table Entry Required: Yes Import Entry Required: Yes	VARCHAR2 (100)		Source code for Event - how the Event being registered for is identified.	ams_Event_registrations	SOURCE_CODE
REGISTRATION_SOURCE_TYPE/ Registration Source Type	VARCHAR2 (30)	Lookup AMS_EVENT_REG_SOURCE	How the party registered for the Event (Web, phone, etc.).	ams_Event_registrations	REG_SOURCE_TYPE_CODE
ATTENDANCE_FLAG/ Attendance Flag	VARCHAR2 (1)	Y/N	Whether or not the party has attended the Event.	ams_Event_registrations	ATTENDED_FLAG
WAITLISTED_FLAG/ Waitlisted Flag	VARCHAR2 (1)	Y/N	Whether or not to force the system to waitlist the party or not waitlist the party. If null, the system will waitlist if registrations are full.	ams_Event_registrations	SYSTEM_STATUS_CODE (If the waitlisted_flag is "Y" then registration status will be Waitlisted).

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
CANCELLATION_FLAG / Cancellation Flag	VARCHAR2 (1)	Y/N	Whether or not to cancel the party's registration.	ams_Event_registrations	SYSTEM_STATUS_CODE (If the cancellation flag is "Y" then registration status will be cancelled).
CANCELLATION REASON_CODE/ Cancellation Reason	VARCHAR2 (30)	Lookup AMS_EVNT_REG_CANCEL_REASON	The reason for cancellation.	ams_Event_registrations	CANCELLATION_REASON_CODE
CONFIRMATION_CODE/ Confirmation Code	VARCHAR2 (30)	-	This code will uniquely identify any registration.	ams_Event_registrations	CONFIRMATION_CODE
ORIGINAL_SYSTEM_REFERENCE/ Original System Reference	VARCHAR2 (240)	-	The original system reference of the registration	hz_parties	ORG_SYSTEM_REFERENCE
REG_PARTY_ID/ Registrant Party ID Table Entry Required: Yes	NUMBER	-	The party id corresponding to the registrant (B2C) or the registrant's company (B2B).	hz_parties	PARTY_ID

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_PARTY_TYPE/ Registrant Party Type	VARCHAR2 (30)	Fnd_Lookups_Party_Type	The Party Type of the registrant's company	hz_parties	PARTY_TYPE
REG_CONTACT_ID/ Registrant Contact ID Table Entry Required: Yes	NUMBER	-	The party ID corresponding to the registrant	hz_parties	PARTY_ID
REG_PARTY_NAME/ Registrant Party Name	VARCHAR2 (360)	-	The name of the registrant's company (forces B2B).	hz_parties	PARTY_NAME
REG_TITLE/ Registrant Title	VARCHAR2 (30)	-	Title (Mr. Ms.) of the registrant	hz_org_contacts	TITLE
REG_FIRST_NAME/ Registrant First Name Table Entry Required: Yes	VARCHAR2 (150)	-	First Name of registrant	hz_parties	PERSON_FIRST_NAME
REG_MIDDLE_NAME/ Registrant Middle Name	VARCHAR2 (60)	-	Middle name of registrant	hz_parties	PERSON_MIDDLE NAME

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_LAST_NAME/ Registrant Last Name Table Entry Required: Yes	VARCHAR2 (150)	-	Last Name of registrant	hz_parties	PERSON_LAST_NAME
REG_ADDRESS1/ Registrant Address1	VARCHAR2 (240)F	-	Address (first line) of the registrant	hz_parties	ADDRESS1
REG_ADDRESS2/ Registrant Address1	VARCHAR2 (240)F	-	Address (second line) of the registrant	hz_parties	ADDRESS2
REG_ADDRESS3/ Registrant Address1	VARCHAR2 (240)F	-	Address (third line) of the registrant	hz_parties	ADDRESS3
REG_ADDRESS4/ Registrant Address1	VARCHAR2 (240)F	-	Address (fourth line) of the registrant	hz_parties	ADDRESS4
REG_GENDER/ Registrant Gender	VARCHAR2 (30)	-	Gender of the registrant	hz_person_profiles	GENDER
REG_ADDRESS_LINE_PHONETIC/ Registrant Address Line Phonetic	VARCHAR2 (360)	-	Phonetic address of the registrant	hz_locations	ADDRESS_LINES_PHONETIC

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_ANALYSIS_FY/ Registrant Analysis FY	VARCHAR2 (5)	-	FY analysis for the registrant	hz_parties	ANALYSIS_FY
REG_APT_FLAG/ Registrant Apt Flag	VARCHAR2 (1)	-	Whether or not the registrant's address is an apartment	hz_locations	APARTMENT_FLAG
REG_BEST_TIME_CONTACT_BEGIN/ Registrant Best Time Contact Begin	DATE	-	Best time to begin contacting the registrant	hz_person_profiles	BEST_TIME_CONTACT_BEGIN
REG_BEST_TIME_CONTACT_END Registrant Best Time Contact End	DATE	-	Best time to stop contacting the registrant	hz_person_profiles	BEST_TIME_CONTACT_END
REG_CATEGORY_CODE/ Registrant Category Code	VARCHAR2 (30)	-	Category code of the registrant	hz_parties	CATEGORY_CODE
REG_CEO_NAME/ Registrant CEO Name	VARCHAR2 (360)	-	CEO of the registrant's company	hz_organization_profiles	CEO_NAME
REG_CITY/ Registrant City	VARCHAR2 (60)	-	City of the Registrant's Address	hz_parties	CITY

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_CONTACT_ME_FLAG/ Registrant Contact Me Flag	VARCHAR2 (1)	Y/N	Whether or not it is OK to contact the registrant (Do or Do Not Contact)	hz_contact_preferences	PREFERENCE_CODE (if Contact_Type is ALL)
REG_COUNTRY/ Registrant Country	VARCHAR2 (60)	-	Country of the registrant's address This is mandatory only if any of the address columns are provided in the data file.	hz_parties	COUNTRY
REG_COUNTY/ Registrant County	VARCHAR2 (60)	-	County of the registrant's address. Required only if any of the address columns are provided in the import data file.	hz_parties	COUNTY
REG_CURRENT_FY_POTENTIAL_REV/ Registrant Current FY Potential Revenue	NUMBER	-	Current fiscal year potential revenue of the registrant's company	hz_parties	CURR_FY_POTENTIAL_REVENUE

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_NEXT_FY_POTANTIAL_REV/ Registrant Next FY Potential Revenue	NUMBER	-	Next fiscal year potential revenue of the registrant's company	hz_parties	NEXT_FY_POTENTIAL_REVENUE
REG_HOUSEHOLD_INCOME/ Registrant Household Income	NUMBER	-	Household income of the registrant	hz_person_profiles	HOUSEHOLD_INCOME
REG_DECISION_MAKER_FLAG/ Registrant Decision Maker Flag	VARCHAR2 (1)	Y/N	Whether or not the registrant is a decision maker	hz_org_contacts	DECISION_MAKER_FLAG
REG_DEPARTMENT/ Registrant Department	VARCHAR2 (360)	-	The registrant's company department	hz_org_contacts	DEPARTMENT
REG_DUN_NO_C/ Registrant Dun No.	VARCHAR2 (30)	-	The Duns Number of the registrant's company	hz_parties	DUNS_NUMBER
REG_EMAIL_ADDRESS/ Registrant email address Table Entry Required: Yes	VARCHAR2 (2000)	-	Email address of the registrant	hz_parties	EMAIL_ADDRESS

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_EMAIL_OK_FLAG/ Registrant Email OK Flag	VARCHAR2 (1)	Y/N	Whether or not it is OK to email the registrant	hz_contact_preferences	PREFERENCE_CODE (if Contact_Type is EMAIL)
REG_EMPLOYEE_TOTAL/ Registrant Employee Total	NUMBER	-	Employee total of the registrant's company	hz_parties	EMPLOYEES_TOTAL
REG_FY_END_MONTH/ Registrant FY End Month	VARCHAR2 (30)	-	The month in which the registrant's company's fiscal year ends	hz_parties	FISCAL_YEAREND_MONTH
REG_FLOOR/ Registrant's Floor	VARCHAR2 (50)	-	The floor (address) of the registrant	hz_locations	FLOOR
REG_GSA_INDICATOR_FLAG/ Registrant GSA Indicator Flag	VARCHAR2 (30)	-	The GSA Indicator Flag of the registrant's company	hz_parties	GSA_INDICATOR_FLAG
REG_HOUSE_NUMBER/ Registrant House Number	NUMBER	-	The house number of the registrant's address	hz_locations	HOUSE_NUMBER

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_IDENTIFYING_ADDRESS_FLAG/ Registrant Identifying Address Flag	VARCHAR2 (1)	Y/N	Whether or not this is the registrant's primary address	hz_party_sites	IDENTIFYING_ADDRESS_FLAG
REG_JGZZ_FISCAL_CODE/ Registrant JGZZ FISCAL Code	VARCHAR2 (20)	-	The JGZZ Fiscal Code of the registrant's company	hz_parties	JGZZ_FISCAL_CODE
REG_JOB_TITLE/ Registrant Job Title	VARCHAR2 (100)	-	The job title of the registrant	hz_org_contacts	JOB_TITLE
REG_LAST_ORDER_DATE/ Registrant Last Order Date	DATE	-	Deprecated	hz_parties	LAST_ORDERED_DATE
REG_ORG_LEGAL_STATUS/ Registrant Org Legal Status	VARCHAR2 (30)	-	The legal status of the registrant's company	hz_organization_profiles	LEGAL_STATUS
REG_LINE_OF_BUSINESS/ Registrant Line of Business	VARCHAR2 (240)	-	The line of business with which the registrant is associated	hz_organization_profiles	LINE_OF_BUSINESS

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_MISSION_STATEMENT/ Registrant Mission Statement	VARCHAR2 (2000)	-	The mission statement for the registrant's company	hz_parties	MISSION_STATEMENT
REG_ORG_NAME_PHONETIC/ Registrant Org Name Phonetic	VARCHAR2 (320)	-	The phonetic name of the registrant's company	hz_parties	ORGANIZATION_NAME_PHONETIC
REG_OVERSEAS_ADDRESS_FLAG/ Registrant Overseas Address Flag	VARCHAR2 (1)	Y/N	Whether or not the address is overseas	hz_locations	OVERSEAS_ADDRESS_FLAG
REG_NAME_SUFFIX/ Registrant Name Suffix	VARCHAR2 (30)	-	The suffix of the registrant (Jr., M.D., etc.)	hz_parties	PERSON_NAME_SUFFIIX
REG_PHONE_AREA_CODE/ Registrant Phone Area Code	VARCHAR2 (10)	-	The area code of the registrant's phone number	hz_contact_points	PHONE_AREA_CODE
REG_PHONE_COUNTRY_CODE/ Registrant Phone Country Code	VARCHAR2 (10)	-	The country code of the registrant's phone number	hz_contact_points	PHONE_COUNTRY_CODE

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_PHONE_EXTENSION/ Registrant Phone Extension	VARCHAR2 (20)	-	The extension of the registrant's phone number	hz_contact_points	PHONE_EXTENSION
REG_PHONE_NUMBER/ Registrant Phone Number	VARCHAR2 (40)	-	The registrant's phone number	hz_contact_points	PHONE_NUMBER
REG_POSTAL_CODE/ Registrant Postal Code	VARCHAR2 (60)	-	The postal code of the registrant's address	hz_parties	POSTAL_CODE
REG_POSTAL_PLUS4_CODE/ Registrant Postal plus4 Code	VARCHAR2 (4)	-	The postal plus-four code of the registrant's address	hz_locations	POSTAL_PLUS4_CODE
REG_PO_BOX_NO/ Registrant PO Box No	VARCHAR2 (50)	-	The PO Box number of the registrant's address	hz_locations	PO_BOX_NUMBER
REG_PROVINCE/ Registrant Province	VARCHAR2 (60)	-	The province of the registrant's address	hz_locations, hz_parties	PROVINCE

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_RURAL_ROUTE_NO/ Registrant Rural Route No	VARCHAR2 (50)	-	The rural route number of the registrant's address	hz_locations	RURAL_ROUTE_NUMBER
REG_RURAL_ROUTE_TYPE / Registrant Rural Route Type	VARCHAR2 (30)	-	The rural route type of the registrant's address	hz_locations	RURTAL_ROUTE_TYPE
REG_SECONDARY_SUFFIX_ELEMENT/ Registrant Secondary Suffix Element	VARCHAR2 (30)	-	The secondary suffix (such as Jr. or M.D.) of the registrant	hz_locations	SECONDARY_SUFFIX_ELEMENT
REG_SIC_CODE/ Registrant SIC Code	VARCHAR2 (30)	-	The SIC Code of the registrant's company	hz_parties	SIC_CODE
REG_SIC_CODE_TYPE/ Registrant SIC Code Type	VARCHAR2 (30)	-	The SIC Code Type of the registrant's company	hz_parties	SIC_CODE_TYPE
REG_SITE_USE_CODE/ Registrant Site Use Code	VARCHAR2 (30)	-	The site use code of the registrant's address	Not Used	Not Used

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_STATE / Registrant State	VARCHAR2 (60)	-	The state of the registrant's address	hz_locations, hz_parties	STATE
REG_STREET/ Registrant Street	VARCHAR2 (50)	-	The street of the registrant's address	hz_locations	STREET
REG_STREET_NUMBER/ Registrant Street Number	VARCHAR2 (50)	-	The street number of the registrant's address	hz_locations	STREET_NUMBER
REG_STREET_SUFFIX/ Registrant Street Suffix	VARCHAR2 (50)	-	The street suffix of the registrant's address	hz_locations	STREET_SUFFIX
REG_SUITE/ Registrant Suite	VARCHAR2 (50)	-	The suite of the registrant's address	hz_locations	SUITE
REG_TAX_NAME/ Registrant Tax Name	VARCHAR2 (30)	-	The tax name of the registrant's company	hz_parties	TAX_NAME
REG_TAX_REFERENCE/ Registrant Tax Reference	VARCHAR2 (50)	-	The tax reference of the registrant's company	hz_parties	TAX_REFERENCE

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
REG_TIME_ ZONE/ Registrant Time Zone	NUMBER	-	The timezone of the registrant's address	hz_locations	TIME_ZON E
REG_TOTA L_NO_OF_O RDER/ Registrant Total Number of Orders	NUMBER	-	Deprecated	hz_parties	TOTAL_NU M_OF_ORD ERS
REG_TOTA L_ORDER_ AMOUNT/ Registrant Total Order Amount	NUMBER	-	Deprecated	hz_parties	TOTAL_OR DERED_AM OUNT
REG_YEAR_ ESTABLISH ED/ Registrant Year Established	NUMBER	-	The year the registrant's company was established	hz_parties	YEAR_ESTA BLISHED
REG_URL/ Registrant URL	VARCHAR2 (2000)	-	The URL of the registrant's company	hz_contact_p oints, hz_parties	URL
ATT_PARTY _ID/ attendant Party ID Table Entry Required: Yes	NUMBER	-	The party id correspondi ng to the attendant (B2C) or the attendant's company (B2B).	hz_parties	PARTY_ID

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_PARTY_TYPE/ Attendant Party Type	VARCHAR2 (30)	-	The Party Type of the attendant's company	hz_parties	PARTY_TYPE
ATT_CONTACT_ID/ Attendant Contact ID Table Entry Required: Yes	NUMBER	-	The party ID corresponding to the attendant	hz_parties	PARTY_ID
ATT_PARTY_NAME/ Attendant Party Name	VARCHAR2 (360)	-	The name of the attendant's company (forces B2B).	hz_parties	PARTY_NAME
ATT_TITLE/ Attendant Title	VARCHAR2 (30)	-	Title (Mr. Ms.) of the attendant	hz_org_contacts	TITLE
ATT_FIRST_NAME/ Attendant First Name Table Entry Required: Yes	VARCHAR2 (150)	-	First Name of attendant	hz_parties	PERSON_FIRST_NAME
ATT_MIDDLE_NAME/ Attendant Middle Name	VARCHAR2 (60)	-	Middle name of attendant	hz_parties	PERSON_MIDDLE NAME

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_LAST_NAME/ Attendant Last Name Table Entry Required: Yes	VARCHAR2 (150)	-	Last Name of attendant	hz_parties	PERSON_LAST_NAME
ATT_ADDRESS1/ Attendant Address1	VARCHAR2 (240)F	-	Address (first line) of the attendant	hz_parties	ADDRESS1
ATT_ADDRESS2/ Attendant Address1	VARCHAR2 (240)F	-	Address (second line) of the attendant	hz_parties	ADDRESS2
ATT_ADDRESS3/ Attendant Address1	VARCHAR2 (240)F	-	Address (third line) of the attendant	hz_parties	ADDRESS3
ATT_ADDRESS4/ Attendant Address1	VARCHAR2 (240)F	-	Address (fourth line) of the attendant	hz_parties	ADDRESS4
ATT_GENDER/ Attendant Gender	VARCHAR2 (30)	-	Gender of the attendant	hz_person_profiles	GENDER
ATT_ADDRESS_LINE_PHONETIC/ Attendant Address Line Phonetic	VARCHAR2 (360)	-	Phonetic address of the attendant	hz_locations	ADDRESS_LINES_PHONETIC

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_ANALYSIS_FY/ Attendant Analysis FY	VARCHAR2 (5)	-	FY analysis for the attendant	hz_parties	ANALYSIS_FY
ATT_APT_FLAG/ Attendant Apt Flag	VARCHAR2 (1)	Y/N	Whether or not the attendant's address is an apartment	hz_locations	APARTMENT_FLAG
ATT_BEST_TIME_CONTACT_BEGIN/ Attendant Best Time Contact Begin	DATE	-	Best time to begin contacting the attendant	hz_person_profiles	BEST_TIME_CONTACT_BEGIN
ATT_BEST_TIME_CONTACT_END Attendant Best Time Contact End	DATE	-	Best time to stop contacting the attendant	hz_person_profiles	BEST_TIME_CONTACT_END
ATT_CATEGORY_CODE/ Attendant Category Code	VARCHAR2 (30)	-	Category code of the attendant	hz_parties	CATEGORY_CODE
ATT_CEO_NAME/ Attendant CEO Name	VARCHAR2 (360)	-	CEO of the attendant's company	hz_organization_profiles	CEO_NAME
ATT_CITY/ Attendant City	VARCHAR2 (60)	-	City of the attendant's Address	hz_parties	CITY

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_CONTACT_ME_FLAG/ Attendant Contact Me Flag	VARCHAR2 (1)	Y/N	Whether or not it is OK to contact the attendant (Do or Do Not Contact)	hz_contact_preferences	PREFERENCE_CODE (if Contact_Type is ALL)
ATT_COUNTRY/ Attendant Country	VARCHAR2 (60)	-	Country of the attendant's address	hz_parties	COUNTRY
ATT_COUNTY/ Attendant County	VARCHAR2 (60)	-	County of the attendant's address	hz_parties	COUNTY
ATT_CURRENT_FY_POTENTIAL_REV/ Attendant Current FY Potential Revenue	NUMBER	-	Current fiscal year potential revenue of the attendant's company	hz_parties	CURR_FY_POTENTIAL_REVENUE
ATT_NEXT_FY_POTANTIAL_REV/ Attendant Next FY Potential Revenue	NUMBER	-	Next fiscal year potential revenue of the attendant's company	hz_parties	NEXT_FY_POTENTIAL_REVENUE
ATT_HOUSEHOLD_INCOME/ Attendant Household Income	NUMBER		Household income of the attendant	hz_person_profiles	HOUSEHOLD_INCOME

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_DECISION_MAKER_FLAG/ Attendant Decision Maker Flag	VARCHAR2 (1)	Y/N	Whether or not the attendant is a decision maker	hz_org_contacts	DECISION_MAKER_FLAG
ATT_DEPARTMENT/ Attendant Department	VARCHAR2 (360)	-	The attendant's company department	hz_org_contacts	DEPARTMENT
ATT_DUN_NO_C/ Attendant Dun No.	VARCHAR2 (30)	-	The Duns Number of the attendant's company	hz_parties	DUNS_NUMBER
ATT_EMAIL_ADDRESS/ Attendant email address Table Entry Required: Yes	VARCHAR2 (2000)	-	Email address of the attendant	hz_parties	EMAIL_ADDRESS
ATT_EMAIL_OK_FLAG/ Attendant Email OK Flag	VARCHAR2 (1)	Y/N	Whether or not it is OK to email the attendant	hz_contact_preferences	PREFERENCE_CODE (if Contact_Type is EMAIL)
ATT_EMPLOYEE_TOTAL/ Attendant Employee Total	NUMBER	-	Employee total of the attendant's company	hz_parties	EMPLOYEES_TOTAL

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_FY_END_MONTH/ Attendant FY End Month	VARCHAR2 (30)	-	The month in which the attendant's company's fiscal year ends	hz_parties	FISCAL_YEAREND_MONTH
ATT_FLOOR/ Attendant's Floor	VARCHAR2 (50)	-	The floor (address) of the attendant	hz_locations	FLOOR
ATT_GSA_INDICATOR_FLAG/ Attendant GSA Indicator Flag	VARCHAR2 (30)	-	The GSA Indicator Flag of the attendant's company	hz_parties	GSA_INDICATOR_FLAG
ATT_HOUSE_NUMBER/ Attendant House Number	NUMBER	-	The house number of the attendant's address	hz_locations	HOUSE_NUMBER
ATT_IDENTIFYING_ADDRESS_FLAG/ Attendant Identifying Address Flag	VARCHAR2 (1)	Y/N	Whether or not this is the attendant's primary address	hz_party_sites	IDENTIFYING_ADDRESS_FLAG
ATT_JGZZ_FISCAL_CODE/ Attendant JGZZ FISCAL Code	VARCHAR2 (20)	-	The JGZZ Fiscal Code of the attendant's company	hz_parties	JGZZ_FISCAL_CODE

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_JOB_TITLE/ Attendant Job Title	VARCHAR2 (100)	-	The job title of the attendant	hz_org_contacts	JOB_TITLE
ATT_LAST_ORDER_DATE/ Attendant Last Order Date	DATE	-	Deprecated	hz_parties	LAST_ORDERED_DATE
ATT_ORG_LEGAL_STATUS/ Attendant Org Legal Status	VARCHAR2 (30)	-	The legal status of the attendant's company	hz_organization_profiles	LEGAL_STATUS
ATT_LINE_OF_BUSINESS/ Attendant Line of Business	VARCHAR2 (240)	-	The line of business with which the attendant is associated	hz_organization_profiles	LINE_OF_BUSINESS
ATT_MISSION_STATEMENT/ Attendant Mission Statement	VARCHAR2 (2000)	-	The mission statement for the attendant's company	hz_parties	MISSION_STATEMENT
ATT_ORG_NAME_PHONETIC/ Attendant Org Name Phonetic	VARCHAR2 (320)	-	The phonetic name of the attendant's company	hz_parties	ORGANIZATION_NAME_PHONETIC

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_OVERSEAS_ADDRESS_FLAG/ Attendant Overseas Address Flag	VARCHAR2 (1)	Y/N	Whether or not the address is overseas	hz_locations	OVERSEAS_ADDRESS_FLAG
ATT_NAME_SUFFIX/ Attendant Name Suffix	VARCHAR2 (30)	-	The suffix of the attendant (Jr., M.D., etc.)	hz_parties	PERSON_NAME_SUFFIX
ATT_PHONE_AREA_CODE/ Attendant Phone Area Code	VARCHAR2 (10)	-	The area code of the attendant's phone number	hz_contact_points	PHONE_AREA_CODE
ATT_PHONE_COUNTRY_CODE/ Attendant Phone Country Code	VARCHAR2 (10)	-	The country code of the attendant's phone number	hz_contact_points	PHONE_COUNTRY_CODE
ATT_PHONE_EXTENSION/ Attendant Phone Extension	VARCHAR2 (20)	-	The extension of the attendant's phone number	hz_contact_points	PHONE_EXTENSION
ATT_PHONE_NUMBER/ Attendant Phone Number	VARCHAR2 (40)	-	The attendant's phone number	hz_contact_points	PHONE_NUMBER

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_POSTAL_CODE/ Attendant Postal Code	VARCHAR2 (60)	-	The postal code of the attendant's address	hz_parties	POSTAL_CODE
ATT_POSTAL_PLUS4_CODE/ Attendant Postal plus4 Code	VARCHAR2 (4)	-	The postal plus-four code of the attendant's address	hz_locations	POSTAL_PLUS4_CODE
ATT_PO_BOX_NO/ Attendant PO Box No	VARCHAR2 (50)	-	The PO Box number of the attendant's address	hz_locations	PO_BOX_NUMBER
ATT_PROVINCE/ Attendant Province	VARCHAR2 (60)	-	The province of the attendant's address	hz_locations, hz_parties	PROVINCE
ATT_RURAL_ROUTE_NO/ Attendant Rural Route Number	VARCHAR2 (50)	-	The rural route number of the attendant's address	hz_locations	RURAL_ROUTE_NUMBER
ATT_RURAL_ROUTE_TYPE/ Attendant Rural Route Type	VARCHAR2 (30)	-	The rural route type of the attendant's address	hz_locations	RURTAL_ROUTE_TYPE

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_SECONDARY_SUFFIX_ELEMENT/ Attendant Secondary Suffix Element	VARCHAR2 (30)	-	The secondary suffix (such as Jr. or M.D.) of the attendant	hz_locations	SECONDARY_SUFFIX_ELEMENT
ATT_SIC_CODE/ Attendant SIC Code	VARCHAR2 (30)	-	The SIC Code of the attendant's company	hz_parties	SIC_CODE
ATT_SIC_CODE_TYPE/ Attendant SIC Code Type	VARCHAR2 (30)	-	The SIC Code Type of the attendant's company	hz_parties	SIC_CODE_TYPE
ATT_SITE_USE_CODE/ Attendant Site Use Code	VARCHAR2 (30)	-	The site use code of the attendant's address	Not Used	Not Used
ATT_STATE / Attendant State	VARCHAR2 (60)	-	The state of the attendant's address	hz_locations, hz_parties	STATE
ATT_STREET/ Attendant Street	VARCHAR2 (50)	-	The street of the attendant's address	hz_locations	STREET
ATT_STREET_NUMBER/ Attendant Street Number	VARCHAR2 (50)	-	The street number of the attendant's address	hz_locations	STREET_NUMBER

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_STREET_SUFFIX/ Attendant Street Suffix	VARCHAR2 (50)	-	The street suffix of the attendant's address	hz_locations	STREET_SUFFIX
ATT_SUITE/ Attendant Suite	VARCHAR2 (50)	-	The suite of the attendant's address	hz_locations	SUITE
ATT_TAX_NAME/ Attendant Tax Name	VARCHAR2 (30)	-	The tax name of the attendant's company	hz_parties	TAX_NAME
ATT_TAX_REFERENCE/ Attendant Tax Reference	VARCHAR2 (50)	-	The tax reference of the attendant's company	hz_parties	TAX_REFERENCE
ATT_TIME_ZONE/ Attendant Time Zone	NUMBER	-	The timezone of the attendant's address	hz_locations	TIME_ZONE
ATT_TOTAL_NO_OF_ORDER/ Attendant Total Number of Orders	NUMBER	-	Deprecated	hz_parties	TOTAL_NUM_OF_ORDERS
ATT_TOTAL_ORDER_AMOUNT/ Attendant Total Order Amount	NUMBER	-	Deprecated	hz_parties	TOTAL_ORDERED_AMOUNT

Table Column / Field in Import File	Data Type	Valid Values	Comments	Table Name	Column Name
ATT_YEAR_ESTABLISHED/ Attendant Year Established	NUMBER	-	The year the attendant's company was established	hz_parties	YEAR_ESTABLISHED
ATT_URL/ Attendant URL	VARCHAR2 (2000)	-	The URL of the attendant's company	hz_contact_points, hz_parties	URL

Lead List Import Fields

The following field is new:

- PERSON_INITIALS

Obsolete columns:

- CUSTOMER_KEY
- ADDRESS_KEY
- CONTACT_KEY

Event List Import Fields

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ACCEPT_FLAG	-	-	-	-	-
ACTIVE_FLAG	VARCHAR2 (1)	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ADDRESS_EFFECTIVE_DATE	VARCHAR2	-	-	-	-
ADDRESS_KEY	VARCHAR2	-	-	-	Stores the Address Key generated
ADDRESS_LINES_PHONETIC	VARCHAR2	-	-	-	-
ADDRESS_STYLE	VARCHAR2	-	-	-	-
ADDRESSEE	VARCHAR2	-	-	-	-
ASSIGN_DATE	VARCHAR2	-	-	-	-
ASSIGN_SALES_GROUP_ID	VARCHAR2	-	-	-	-
ASSIGN_TO_PERSON_ID	VARCHAR2	-	-	-	-
ASSIGN_TO_SALESFORCE_ID	VARCHAR2	-	-	-	-
ATTENDANCE_FAILURE_REASON	VARCHAR2 (30)	-	-	AMS_EVENT_ATTENDANCE_FAILURE_CODE LOOKUP	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ATTENDANCE_RESULT_CODE	VARCHAR2 (30)	-	-	-	-
ATTENDANT_ACCOUNT_ID	NUMBER	-	-	CUSTOMER_ACCOUNT_ID	-
ATTENDANT_CONTACT_ID	NUMBER		Yes	CONTACT_ID	-
ATTENDANT_LANGUAGE	VARCHAR2 (30)	-	-	-	-
ATTENDANT_PARTY_ID	NUMBER	-	-	PARTY_ID	-
ATTENDED_FLAG	VARCHAR2 (1)	-	-	-	-
ATTRIBUTE_CATEGORY	VARCHAR2 (30)	-	-	-	-
ATTRIBUTE1	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE10	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE11	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE12	VARCHAR2 (150)	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ATTRIBUTE 13	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 14	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 15	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 2	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 3	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 4	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 5	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 6	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 7	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 8	VARCHAR2 (150)	-	-	-	-
ATTRIBUTE 9	VARCHAR2 (150)	-	-	-	-
AUTO_ASSIGNMENT_TYPE	VARCHAR2	-	-	-	-
AUTO_REGISTER_FLAG	VARCHAR2 (1)	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
BUDGET_AMOUNT	NUMBER	-	-	-	-
BUDGET_AMOUNT_1	NUMBER	-	-	-	-
BUDGET_AMOUNT_2	NUMBER	-	-	-	-
BUDGET_AMOUNT_3	NUMBER	-	-	-	-
BUDGET_AMOUNT_4	NUMBER	-	-	-	-
BUDGET_AMOUNT_5	NUMBER	-	-	-	-
BUDGET_STATUS_CODE	VARCHAR2	-	-	-	-
CANCELLATION_CODE	NUMBER	-	-	-	-
CANCELLATION_REASON_CODE	VARCHAR2 (30)	-	-	AMS_EVENT_REG_CANCEL_REASON LOOKUP	-
CHANNEL_CODE	VARCHAR2	-	-	-	-
CLOSE_REASON	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
CNT_PNT_CONTENT_SOURCE_TYPE	VARCHAR2	-	-	-	This is a mandatory column in HZ_CONTACT_POINTS, but if not given, default it to 'USER_ENTERED'
CNT_PNT_TIME_ZONE	VARCHAR2	-	-	-	-
CONFIRMED_FLAG	VARCHAR2 (1)	-	-	-	-
CONTACT_KEY	VARCHAR2	-	-	-	Stores the Contact Key generated
CONTACT_NUMBER	VARCHAR2	-	-	-	-
CONTACT_PARTY_ID	NUMBER	-	-	-	-
CONTACT_ROLE_CODE	VARCHAR2	-	-	-	-
CONTENT_SOURCE_TYPE	VARCHAR2	-	-	-	This is a mandatory column in HZ_LOCATIONS, but if not given, default it to 'USER_ENTERED'

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
CREATED_BY	NUMBER	Yes	-	-	Populated by the list import program.
CREATION_DATE	DATE	Yes	-	-	Populated by the list import program.
CURRENCY_CODE	VARCHAR2	-	-	-	-
CUSTOMER_KEY	VARCHAR2	-	-	-	Stores the customer Key generated
DATE_REGISTRATION_PLACED	DATE	-	-	-	-
DECISION_MAKER_FLAG	VARCHAR2	-	-	-	-
DECISION_TIMEFRAME_CODE	VARCHAR2	-	-	-	-
DELETED_FLAG	VARCHAR2	-	-	-	-
DEPARTMENT	VARCHAR2	-	-	-	-
DEPARTMENT_CODE	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
DESCRIPTION	VARCHAR2	-	-	-	-
DESCRIPTION	VARCHAR2	-	-	-	-
DO_NOT_EMAIL_FLAG	VARCHAR2	-	-	-	If 'Y' then no emails sent to Contact.
DO_NOT_FAX_FLAG	VARCHAR2	-	-	-	If 'Y' then no fax sent to Contact.
DO_NOT_PHONE_FLAG	VARCHAR2	-	-	-	If 'Y' then no phone calls to Contact.
DUNS_NUMBER	VARCHAR2	-	-	-	-
EMAIL_FORMAT	VARCHAR2	-	-	-	-
EVALUATED_FLAG	VARCHAR2 (1)	-	-	-	-
EVENT_OFFER_ID	NUMBER	-	Yes	AMS_EVENT_OFFERS_ALL_B	-
FA_LOCATION_ID	NUMBER	-	-	-	-
FAX_AREA_CODE	VARCHAR2	-	-	-	-
FAX_COUNTRY_CODE	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
FAX_EXTENSION	VARCHAR2	-	-	-	-
FAX_NUMBER	VARCHAR2	-	-	-	-
FLOOR	VARCHAR2	-	-	-	-
GROUP_TYPE	VARCHAR2	-	-	-	-
GSA_INDICATOR_FLAG	VARCHAR2	-	-	-	-
HOUSE_NUMBER	VARCHAR2	-	-	-	-
HQ_BRANCH_IND	NUMBER	-	-	-	-
IMPORT_FLAG	NUMBER	-	-	-	-
IMPORT_LIST_HEADER_ID	NUMBER	Yes	-	-	Auto Generated
IMPORT_SOURCE_LINE_ID	NUMBER	Yes	-	-	Auto Generated
IMPORT_SUCCESSFUL_FLAG	VARCHAR2 (1)	-	-	-	Populated by the list import program.
INBOUND_CHANNEL_ID	NUMBER	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
INBOUND_MEDIA_ID	NUMBER	-	-	-	-
INCUMBENT_PARTNER_PARTY_ID	NUMBER	-	-	-	Partner specific
INCUMBENT_PARTNER_RESOURCE_ID	NUMBER	-	-	-	Partner specific
INTEREST_TYPE_ID_1	NUMBER	-	-	-	-
INTEREST_TYPE_ID_2	NUMBER	-	-	-	-
INTEREST_TYPE_ID_3	NUMBER	-	-	-	-
INTEREST_TYPE_ID_4	NUMBER	-	-	-	-
INTEREST_TYPE_ID_5	NUMBER	-	-	-	-
INVENTORY_ITEM_ID_1	NUMBER	-	-	-	-
INVENTORY_ITEM_ID_2	NUMBER	-	-	-	-
INVENTORY_ITEM_ID_3	NUMBER	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
INVENTORY_ITEM_ID_4	NUMBER	-	-	-	-
INVENTORY_ITEM_ID_5	NUMBER	-	-	-	-
INVITE_ONLY_OVERRIDE_FLAG	VARCHAR2 (1)	-	-	-	-
JGZZ_FISCAL_CODE	VARCHAR2	-	-	-	-
JOB_TITLE_CODE	VARCHAR2	-	-	-	Stores the job title code
KEEP_FLAG	VARCHAR2	-	-	-	-
KNOWN_AS	VARCHAR2	-	-	-	-
KNOWN_AS2	VARCHAR2	-	-	-	-
KNOWN_AS3	VARCHAR2	-	-	-	-
KNOWN_AS4	VARCHAR2	-	-	-	-
KNOWN_AS5	VARCHAR2	-	-	-	-
LANGUAGE	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LANGUAGE_NAME	VARCHAR2	-	-	-	-
LAST_ORDERED_DATE	VARCHAR2	-	-	-	-
LAST_REG_STATUS_DATE	DATE	-	-	Date when the registration closed.	-
LAST_UPDATE_LOGIN	NUMBER	Yes	-	-	Populated by the list import program.
LAST_UPDATED_BY	NUMBER	Yes	-	-	Populated by the list import program.
LEAD_DATE	DATE	-	-	-	-
LEAD_NUMBER	VARCHAR2	-	-	-	-
LEAD_RANK_ID	NUMBER	-	-	-	Stores the sales lead rank id. Need not supply if supplied will get validated

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LOAD_ERROR_MESSAGE	VARCHAR2	-	-	-	Currently, not used. To find the error messages, query from ams_errors
LOC_DESCRIPTION	VARCHAR2	-	-	-	-
LOC_HIERARCHY_ID	NUMBER	-	-	-	-
LOC_VALIDATED_FLAG	VARCHAR2	-	-	-	-
LOCATION_DIRECTIONS	VARCHAR2	-	-	-	-
LOCATION_ID	NUMBER	-	-	-	Location ID to which address information is mapped
MAIL_STOP	VARCHAR2	-	-	-	-
MAILSTOP	VARCHAR2	-	-	-	-
MARKETING_SCORE	NUMBER	-	-	-	-
MAX_ATTENDEE_OVERRIDE_FLAG	VARCHAR2 (1)	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
MIDDLE_INITIAL	VARCHAR2	-	-	-	-
MISSION_STATEMENT	VARCHAR2	-	-	-	-
NET_WORTH	VARCHAR2	-	-	-	free text format
NEW_CON_FLAG	VARCHAR2	-	-	-	<< DO NOT POPULATE >> if 1 - new contact, 0- existing Contact
NEW_LOC_FLAG	VARCHAR2	-	-	-	<< DO NOT POPULATE >> if 1 - this is a new location. If 0- this is already existing.
NEW_PARTY_FLAG	VARCHAR2	-	-	-	<< DO NOT POPULATE >> If 1 - party is newly created. If 0, existing party is used.
NEW_PS_FLAG	VARCHAR2	-	-	-	<< DO NOT POPULATE >> if 1 - new PS, if 0 - PS already existing

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
NEW_REL_FLAG	VARCHAR2	-	-	-	<< DO NOT POPULATE >> if 1 - new relationship, 0- existing Rel
OBJECT_VERSION_NUMBER	NUMBER	Yes	-	-	Populated by the list import program.
OFFER_ID	NUMBER	-	-	-	-
OFFER_ID_1	NUMBER	-	-	-	-
OFFER_ID_2	NUMBER	-	-	-	-
OFFER_ID_3	NUMBER	-	-	-	-
OFFER_ID_4	NUMBER	-	-	-	-
OFFER_ID_5	NUMBER	-	-	-	-
ORDER_HEADER_ID	NUMBER	-	-	-	-
ORDER_LINE_ID	NUMBER	-	-	-	-
ORG_CNT_COMMENTS	VARCHAR2	-	-	-	-
ORG_CNT_TITLE	VARCHAR2	-	-	-	-
ORGANIZATION_ID_1	NUMBER	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
ORGANIZATION_ID_2	NUMBER	-	-	-	-
ORGANIZATION_ID_3	NUMBER	-	-	-	-
ORGANIZATION_ID_4	NUMBER	-	-	-	-
ORGANIZATION_ID_5	NUMBER	-	-	-	-
ORGANIZATION_NAME_PHONETIC	VARCHAR2	-	-	-	-
ORIG_SYSTEM_CODE	VARCHAR2	-	-	-	Source application code where the lead originated example OTN
ORIG_SYSTEM_REFERENCE	VARCHAR2	-	-	-	May be populated as <orig_system_code > <identifier> example OTN10100
ORIGINAL_REGISTRANT_CONTACT_ID	NUMBER	-	Yes	-	-
OWNER_USER_ID	NUMBER	-	Yes	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PARENT_PROJECT	VARCHAR2	-	-	-	-
PARTIES_VALIDATED_FLAG	VARCHAR2	-	-	-	-
PARTY_ID	NUMBER	-	-	-	Party ID to which the customer information is mapped
PARTY_NUMBER	VARCHAR2	-	-	-	-
PARTY_REFERENCE_USE_FLAG	VARCHAR2	-	-	-	-
PARTY_SITE_ID	NUMBER	-	-	-	Party Site ID to which the party and location information is mapped
PARTY_SITE_NAME	VARCHAR2	-	-	-	-
PARTY_SITE_NUMBER	VARCHAR2	-	-	-	Can be populated ONLY when profile "HZ Generate Party Number" set to 'N'
PARTY_TYPE	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PAYMENT_STATUS_CODE	VARCHAR2 (30)	-	-	-	-
PERSON_FIRST_NAME_PHONETIC	VARCHAR2	-	-	-	-
PERSON_IDEN_TYPE	VARCHAR2	-	-	-	-
PERSON_IDENTIFIER	VARCHAR2	-	-	-	-
PERSON_LAST_NAME_PHONETIC	VARCHAR2	-	-	-	-
PERSON_NAME_SUFFIX	VARCHAR2	-	-	-	-
PERSON_PREVIOUS_LAST_NAME	VARCHAR2	-	-	-	-
PHONE_CALLING_CALENDAR	VARCHAR2	-	-	-	-
PHONE_COUNTRY_CODE	VARCHAR2	-	-	-	-
PHONE_ID	NUMBER	-	-	-	DO NOT POPULATE
PO_BOX_NUMBER	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
LOCATION _POSITION		-	-	-	-
POSTAL_PL US4_CODE	VARCHAR2	-	-	-	-
PRIMARY_C ONTACT_F LAG	VARCHAR2	-	-	-	-
PRIMARY_C ONTACT_P ER_ROLE_T YPE	VARCHAR2	-	-	-	'Y' or 'N'
PRIMARY_I NTEREST_C ODE_ID_1	NUMBER	-	-	-	-
PRIMARY_I NTEREST_C ODE_ID_2	NUMBER	-	-	-	-
PRIMARY_I NTEREST_C ODE_ID_3	NUMBER	-	-	-	-
PRIMARY_I NTEREST_C ODE_ID_4	NUMBER	-	-	-	-
PRIMARY_I NTEREST_C ODE_ID_5	NUMBER	-	-	-	-
PRIMARY_P ER_TYPE	VARCHAR2	-	-	-	'Y' or 'N'

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PRM_ASSIGNMENT_TYPE	VARCHAR2	-	-	-	-
PRM_EXEC_SPONSOR_FLAG	VARCHAR2	-	-	-	Partner specific
PRM_IND_CLASSIFICATION_CODE	VARCHAR2	-	-	-	Partner specific
PRM_PRJ_LEAD_IN_PLACE_FLAG	VARCHAR2	-	-	-	Partner specific
PRM_SALES_LEAD_TYPE	VARCHAR2	-	-	-	Partner specific
PROGRAM_APPLICATION_ID	NUMBER	-	-	-	-
PROGRAM_APPLICATION_ID	NUMBER	-	-	-	DO NOT POPULATE
PROGRAM_ID	NUMBER	-	-	-	-
PROGRAM_ID		-	-	-	Concurrent process generated
PROGRAM_UPDATE_DATE	DATE	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
PROGRAM_UPDATE_DATE	DATE	-	-	-	-
PROMOTION_CODE	VARCHAR2	-	-	-	If given and promotion_id is not provided, then this will be transferred to promotion_id.
PROMOTION_ID	NUMBER	-	-	-	If given, this is used for creating the sales lead header.
PROSPECT_FLAG	VARCHAR2 (1)	-	-	-	-
PS_USES_COMMENTS	VARCHAR2	-	-	-	-
QUALIFIED_FLAG	VARCHAR2	-	-	-	-
QUANTITY_1	NUMBER	-	-	-	-
QUANTITY_2	NUMBER	-	-	-	-
QUANTITY_3	NUMBER	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
QUANTITY_4	NUMBER	-	-	-	-
QUANTITY_5	NUMBER	-	-	-	-
RANK	VARCHAR2	-	-	-	-
RAW_PHONE_NUMBER	VARCHAR2	-	-	-	-
REG_SOURCE_TYPE_CODE	VARCHAR2 (30)	-	-	AMS_EVENT_REG_SOURCE_TYPE LOOKUP	-
REGISTRANT_ACCOUNT_ID	NUMBER	-	Yes	CUSTOMER_ACCOUNT_ID	-
REGISTRANT_CONTACT_ID	NUMBER	-	Yes	CONTACT_ID	-
REGISTRANT_PARTY_ID	NUMBER	-	Yes	PARTY_ID	-
REGISTRATION_GROUP_ID	NUMBER	-	Yes	-	-
REGISTRATION_SOURCE_ID	NUMBER	-	-	-	-
REJECT_REASON_CODE	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
REL_PARTY_ID	NUMBER	-	-	-	Relationship's party ID to which the relationship is mapped.
REQUEST_ID	NUMBER	-	-	-	-
REQUEST_ID	NUMBER	-	-	-	-
ROLE_LEVEL	VARCHAR2	-	-	-	-
SALES_LEAD_ID	NUMBER	-	-	-	<< DO NOT POPULATE >> Sales Lead ID to which the sales lead information is mapped.
SALES_TAX_GEOCODE	VARCHAR2	-	-	-	-
SALES_TAX_INSIDE_CITY_LIMITS	VARCHAR2	-	-	-	-
SALESREP_ID	NUMBER	-	-	-	-
SCORECARD_ID	NUMBER	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
SECONDARY_INTEREST_CODE_ID_1	NUMBER	-	-	-	-
SECONDARY_INTEREST_CODE_ID_2	NUMBER	-	-	-	-
SECONDARY_INTEREST_CODE_ID_3	NUMBER	-	-	-	-
SECONDARY_INTEREST_CODE_ID_4	NUMBER	-	-	-	-
SECONDARY_INTEREST_CODE_ID_5	NUMBER	-	-	-	-
SECURITY_GROUP_ID	NUMBER	-	-	-	-
SECURITY_GROUP_ID	NUMBER	-	-	-	-
SHORT_DESCRIPTION	VARCHAR2	-	-	-	-
SIC_CODE_TYPE	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
SITE_USE_TYPE	VARCHAR2	-	-	-	This is a mandatory column for HZ_PARTY_SITE_USES. But if not given, it will be defaulted to 'BILL_TO'
SOURCE_CODE	VARCHAR2 (30)	-	Yes	AMS_EVENT_OFFERS_ALL_B	-
SOURCE_PROMOTION_ID_1	NUMBER	-	-	-	-
SOURCE_PROMOTION_ID_2	NUMBER	-	-	-	-
SOURCE_PROMOTION_ID_3	NUMBER	-	-	-	-
SOURCE_PROMOTION_ID_4	NUMBER	-	-	-	-
SOURCE_PROMOTION_ID_5	NUMBER	-	-	-	-
STREET	VARCHAR2	-	-	-	-
STREET_NUMBER	VARCHAR2	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
STREET_SUFFIX	VARCHAR2	-	-	-	-
SUITE	VARCHAR2	-	-	-	-
SYSTEM_STATUS_CODE	VARCHAR2 (30)	-	-	AMS_EVENT_REG_STATUS LOOKUP	-
TARGET_LIST_ID	NUMBER	-	-	-	-
TAX_NAME	VARCHAR2	-	-	-	-
TIME_ZONE	VARCHAR2	-	-	-	-
TOTAL_NUM_OF_ORDERS	NUMBER	-	-	-	-
TOTAL_ORDERED_AMOUNT	NUMBER	-	-	-	-
UOM_CODE_1	NUMBER	-	-	-	-
UOM_CODE_2	NUMBER	-	-	-	-
UOM_CODE_3	NUMBER	-	-	-	-
UOM_CODE_4	NUMBER	-	-	-	-

Table Column / Field in Import File	Data Type	Table Requires Entry	Import Requires Entry	Valid Values	Comments
UOM_CODE_5	NUMBER	-	-	-	-
URGENT_FLAG	VARCHAR2	-	-	-	-
USER_STATUS_ID	NUMBER	-	Yes	AMS_USER_STATUS LOOKUP	-
VEHICLE_RESPONSE_CODE	VARCHAR2	-	-	-	-
WAITLISTED_PRIORITY	VARCHAR2 (30)	-	-	-	-

E

Seeded User Statuses

This appendix covers the following topics:

- User Status Overview
- Seeded User Statuses

User Status Overview

User statuses can be created across the application for a combination of activity and status. Oracle Marketing is seeded with the following user statuses. These user statuses can be modified or extended to meet an organization's business rules.

It is important to note that the addition of a high number of user statuses would mean that the number of values seen in the drop-down list for an object's status will also increase.

Seeded User Statuses

The seeded user status values are as follows:

Seeded User Statuses

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Budget Sourcing Status	APPROVED	Approved	Approved
Budget Sourcing Status	CLOSED	Closed	Accounting Closed

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Budget Sourcing Status	NEW	Planning	Planning
Budget Sourcing Status	PENDING	Pending	Pending Approval
Budget Sourcing Status	REJECTED	Rejected	Rejected by Approver
Budget Status	ACTIVE	Active	Active
Budget Status	ARCHIVED	Archived	Archived
Budget Status	CANCELLED	Cancelled	Cancelled
Budget Status	CLOSED	Closed	Closed
Budget Status	DRAFT	Draft	Draft
Budget Status	ON_HOLD	On Hold	On Hold
Budget Status	PENDING	Pending Approval	Pending Approval
Budget Status	REJECTED	Rejected	Rejected
Campaign Activity Status	ACTIVE	Active	Active
Campaign Activity Status	ARCHIVED	Archived	Archived
Campaign Activity Status	AVAILABLE	Available	Available
Campaign Activity Status	CANCELLED	Cancelled	Cancelled
Campaign Activity Status	CLOSED	Closed	Closed

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Campaign Activity Status	COMPLETED	Completed	Completed
Campaign Activity Status	DENIED_BA	Budget Rejected	Denied Budget Approval
Campaign Activity Status	NEW	New	New
Campaign Activity Status	ON_HOLD	Active Locked	On Hold
Campaign Activity Status	SUBMITTED_BA	Pending Budget Approval	Pending Budget Approval
Campaign Status	ACTIVE	Active	Active
Campaign Status	ARCHIVED	Archived	Archived
Campaign Status	AVAILABLE	Available	Available
Campaign Status	CANCELLED	Cancelled	Cancelled
Campaign Status	CLOSED	Closed	Closed
Campaign Status	COMPLETED	Completed	Completed
Campaign Status	DENIED_BA	Denied - Budget Approval	Budget Denied
Campaign Status	DENIED_TA	Denied - Theme Approval	Theme Denied
Campaign Status	NEW	New	New
Campaign Status	ON_HOLD	On-hold	On Hold
Campaign Status	PLANNING	Planning	Planned
Campaign Status	SUBMITTED_BA	Submitted - Budget Approval	Pending Budget approval

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Campaign Status	SUBMITTED_TA	Submitted - Theme Approval	Pending Theme approval
Claim Status	APPROVED	Approved	Approved
Claim Status	CANCELLED	Cancelled	Cancelled
Claim Status	CLOSED	Closed	Closed
Claim Status	COMPLETE	Complete	Complete
Claim Status	DUPLICATE	Duplicate	Duplicate
Claim Status	NEW	New	New
Claim Status	OPEN	Open	Open
Claim Status	PENDING	Pending	Pending
Claim Status	PENDING_APPROVAL	Pending Approval	Pending Approval
Claim Status	PENDING_CLOSE	Pending Close	Pending Close
Claim Status	REJECTED	Rejected	Rejected
Deliverable Status	ARCHIVED	Archived	Archived
Deliverable Status	AVAILABLE	Available	Final Loaded
Deliverable Status	BUDGET_APPR	Budget Approved	Budget Approval
Deliverable Status	CANCELLED	Cancelled	Cancelled
Deliverable Status	DENIED_BA	Denied - Budget Approval	Budget Denied
Deliverable Status	DENIED_TA	Denied - Concept Approval	Denied Concept Approval

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Deliverable Status	EXPIRED	Expired	Expired
Deliverable Status	NEW	New	New
Deliverable Status	SUBMITTED_BA	Submitted - Budget Approval	Pending Budget approval
Deliverable Status	SUBMITTED_TA	Submitted - Concept Approval	Pending Concept Approval
Deliverable Status	SUPERCEDED	Superceded	Superceded
List Import Status	COMPLETED	Completed	Completed
List Import Status	ERROR	Error	Error
List Import Status	NEW	New	New
List Import Status	PURGED	Purged	Purged
List Import Status	SCHEDULED	Scheduled	Scheduled
List Import Status	STAGED	Staged	Staged
List Status	ARCHIVED	Archived	Archived
List Status	AVAILABLE	Available	Available
List Status	CANCELLED	Cancelled	Cancelled
List Status	DRAFT	Draft	Draft
List Status	EXECUTED	Executed	Executed
List Status	EXECUTING	Executing	Executing
List Status	GENERATING	Generating	Generating
List Status	LOCKED	Locked	Locked

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
List Status	SCHEDULED	Scheduled	Scheduled
List Status	VALIDATED	Validated	Validated
List Status	VALIDATING	Validating	Validating
Marketing Event Agenda Status	CONFIRMED	Confirmed	Confirmed
Marketing Event Agenda Status	UNCONFIRMED	Unconfirmed	Unconfirmed
Marketing Event Registration Status	CANCELLED	Cancelled	Cancelled
Marketing Event Registration Status	ENROLLED	Enrolled	Enrolled
Marketing Event Registration Status	REGISTERED	Registered	Registered
Marketing Event Registration Status	TARGETED	Targeted	Targeted
Marketing Event Registration Status	WAITLISTED	Waitlisted	Waitlisted
Marketing Event Speaker Status	BOOKED	Booked	Booked
Marketing Event Speaker Status	CANCELLED	Cancelled	Cancelled
Marketing Event Speaker Status	CONFIRMED	Confirmed	Confirmed
Marketing Event Speaker Status	SCHEDULED	Scheduled	Scheduled
Marketing Event Status	ACTIVE	Active	Active

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Marketing Event Status	ARCHIVED	Archived	Archived
Marketing Event Status	AVAILABLE	Available	Available
Marketing Event Status	CANCELLED	Cancelled	Cancelled
Marketing Event Status	CLOSED	Closed	Closed
Marketing Event Status	COMPLETED	Completed	Completed
Marketing Event Status	DENIED_BA	Denied Budget Approval	Budget Denied
Marketing Event Status	DENIED_TA	Denied Theme Approval	Theme Denied
Marketing Event Status	NEW	New	New
Marketing Event Status	ON_HOLD	On Hold	On Hold
Marketing Event Status	PLANNING	Planning	Planned
Marketing Event Status	SUBMITTED_BA	Submitted Budget Approval	Pending Budget approval
Marketing Event Status	SUBMITTED_TA	Submitted Theme Approval	Pending Theme approval
Model Status	ARCHIVED	Archived	Archived
Model Status	AVAILABLE	Available	Available
Model Status	BUILDING	Building	Building

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Model Status	CUSTOM	Custom	Custom
Model Status	DRAFT	Draft	Draft
Model Status	EXPIRED	Expired	Expired
Model Status	QUEUED	Queued	Queued
Model Status	SCHEDULED	Scheduled	Scheduled
Model Status	SCORING	Scoring	Scoring
Offer Status	ACTIVE	Active	Active
Offer Status	ARCHIVED	Archived	Archived
Offer Status	CANCELLED	Cancelled	Cancelled
Offer Status	CLOSED	Closed	Closed
Offer Status	COMPLETED	Completed	Completed
Offer Status	DRAFT	Draft	Draft
Offer Status	ONHOLD	On Hold	On-Hold
Offer Status	PENDING	Pending Budget Approval	Submitted - Budget Approval
Offer Status	PENDING_ACTIVE	Pending Active	Pending Active
Offer Status	REJECTED	Budget Rejected	Rejected - Budget Approval
Offer Status	TERMINATED	Terminated	Terminated
Price List Statuses	ACTIVE	Active	Active
Price List Statuses	CANCELLED	Cancelled	Cancelled

User Status For	SYSTEM_STATUS	SYSTEM_NAME	User Status Name
Price List Statuses	DRAFT	Draft	Draft
Price List Statuses	PENDING	Submitted For Approval	Submitted For Approval
Price List Statuses	REJECTED	Rejected	Rejected
Program Status	ACTIVE	Active	Active
Program Status	ARCHIVED	Archived	Archived
Program Status	CANCELLED	Cancelled	Cancelled
Program Status	COMPLETED	Completed	Completed
Program Status	NEW	Draft	Draft
Program Status	ON_HOLD	On Hold	On Hold
Score status	ARCHIVED	Archived	Archived
Score status	COMPLETED	Completed	Completed
Score status	DRAFT	Draft	Draft
Score status	QUEUED	Queued	Queued
Score status	SCHEDULED	Scheduled	Scheduled
Score status	SCORING	Scoring	Running
Segment Status	ARCHIVED	Archived	Archived
Segment Status	AVAILABLE	Available	Available
Segment Status	CANCELLED	Cancelled	Cancelled
Segment Status	DRAFT	Draft	Draft
Segment Status	EXPIRED	Expired	Expired

F

Seeded Data Source and Data Source Attribute Reference

This appendix covers the following topics:

- Seeded Data Sources
- Seeded Data Source Parent-Child Relationships
- Data Source Attribute Reference

Seeded Data Sources

The seeded parent data sources are:

- Person: Represents Business to Consumer (B2C) customer attributes such as first name, last name, marital status, household income, etc.
- Organization Contacts: Represents Business to Business (B2B) attributes such as first name, last name, job title, work e-mail address, etc.
- Organization**:** Represents organization attributes such as company name, business type, revenue, etc.

Seeded Data Source Parent-Child Relationships

The following table describes parent-child relationships for each of the seeded data sources.

Seeded Data Source Parent-Child Relationships

Parent Data Source	Child Data Sources
Persons	• Person Profile • Person Interest • Person Accounts • Person Education • Employment History • Phone 1 – 6 • Fax • System Reference • Interactions • Leads • Order Detail • Install Base Details • Sales Access • Data Mining Aggregates • Data Mining Scores • Party Profitability

Parent Data Source	Child Data Sources
Organization Contacts	• Organizations • Organization Profiles • Organization Accounts • Phone1 – 6 • Fax • System Reference • Interactions • Leads • Order Detail • Install Base Details • Sales Access • Data Mining Aggregates • Data Mining Score • Party Profitability • Person Profile • Person Interest • Person Education • Employment History

Parent Data Source	Child Data Sources
Organization	• Organization Profiles • Organization Accounts • System Reference • Order Detail • Install Base Details • Sales Access • Data Mining Aggregates • Data Mining Scores • Party Profitability

Data Source Attribute Reference

The following table lists seeded data source attributes, the tables or logic from which attribute values are derived, and the name of the data source(s) that use the attribute.

Data Source Attributes

Attribute	Source	Data Source Name(s)
ACCOUNT_ACTIVATION_DATE	HZ_CUST_ACCOUNTS	Account
ACCOUNT_ESTABLISHED_DATE	HZ_CUST_ACCOUNTS	Account
ACCOUNT_LIABLE_FLAG	HZ_CUST_ACCOUNTS	Account
ACCOUNT_NAME	HZ_CUST_ACCOUNTS	Account
ACCOUNT_NUMBER	HZ_CUST_ACCOUNTS	Account

Attribute	Source	Data Source Name(s)
ACCOUNT_TERMINATION_DATE	HZ_CUST_ACCOUNTS	Account
ACCT_LIFE_CYCLE_STATUS	HZ_CUST_ACCOUNTS	Account
AUTOPAY_FLAG	HZ_CUST_ACCOUNTS	Account
COMPETITOR_TYPE	HZ_CUST_ACCOUNTS	Account
COTERMINATE_DAY_MONTH	HZ_CUST_ACCOUNTS	Account
CREDIT_CLASSIFICATION_CODE	HZ_CUST_ACCOUNTS	Account
CURRENT_BALANCE	HZ_CUST_ACCOUNTS	Account
CUST_ACCOUNT_ID	HZ_CUST_ACCOUNTS	Account
CUSTOMER_CLASS_CODE	HZ_CUST_ACCOUNTS	Account
CUSTOMER_TYPE	HZ_CUST_ACCOUNTS	Account
DATE_TYPE_PREFERENCE	HZ_CUST_ACCOUNTS	Account
DATES_NEGATIVE_TOLERANCE	HZ_CUST_ACCOUNTS	Account
DATES_POSITIVE_TOLERANCE	HZ_CUST_ACCOUNTS	Account
DEPARTMENT	HZ_CUST_ACCOUNTS	Account
DEPOSIT_REFUND_METHOD	HZ_CUST_ACCOUNTS	Account
DORMANT_ACCOUNT_FLAG	HZ_CUST_ACCOUNTS	Account
FOB_POINT	HZ_CUST_ACCOUNTS	Account

Attribute	Source	Data Source Name(s)
FREIGHT_TERM	HZ_CUST_ACCOUNTS	Account
HELD_BILL_EXPIRATION_DATE	HZ_CUST_ACCOUNTS	Account
HIGH_PRIORITY_INDICATOR	HZ_CUST_ACCOUNTS	Account
HOLD_BILL_FLAG	HZ_CUST_ACCOUNTS	Account
HOTWATCH_SERVICE_FLAG	HZ_CUST_ACCOUNTS	Account
HOTWATCH_SVC_BAL_IND	HZ_CUST_ACCOUNTS	Account
ITEM_CROSS_REF_PREF	HZ_CUST_ACCOUNTS	Account
MAJOR_ACCOUNT_NUMBER	HZ_CUST_ACCOUNTS	Account
NOTIFY_FLAG	HZ_CUST_ACCOUNTS	Account
NPA_NUMBER	HZ_CUST_ACCOUNTS	Account
ORIG_SYSTEM_REFERENCE	HZ_CUST_ACCOUNTS	Account
OVER_RETURN_TOLERANCE	HZ_CUST_ACCOUNTS	Account
OVER_SHIPMENT_TOLERANCE	HZ_CUST_ACCOUNTS	Account
PAYMENT_TERM_ID	HZ_CUST_ACCOUNTS	Account
PERSON_NAME_SUFFIX	HZ_CUST_ACCOUNTS	Account
PO_EFFECTIVE_DATE	HZ_CUST_ACCOUNTS	Account
PO_EXPIRATION_DATE	HZ_CUST_ACCOUNTS	Account

Attribute	Source	Data Source Name(s)
POSTAL_CODE	HZ_CUST_ACCOUNTS	Account
PRICING_EVENT	HZ_CUST_ACCOUNTS	Account
PRIMARY_SALESREP_ID	HZ_CUST_ACCOUNTS	Account
PRIMARY_SPECIALIST_ID	HZ_CUST_ACCOUNTS	Account
REALTIME_RATE_FLAG	HZ_CUST_ACCOUNTS	Account
RESTRICTION_LIMIT_AMOUNT	HZ_CUST_ACCOUNTS	Account
SALES_CHANNEL_CODE	HZ_CUST_ACCOUNTS	Account
SECONDARY_SPECIALIST_ID	HZ_CUST_ACCOUNTS	Account
SHIP_PARTIAL	HZ_CUST_ACCOUNTS	Account
SHIP_VIA	HZ_CUST_ACCOUNTS	Account
SINGLE_USER_FLAG	HZ_CUST_ACCOUNTS	Account
SOURCE_CODE	HZ_CUST_ACCOUNTS	Account
STATUS	HZ_CUST_ACCOUNTS	Account
STATUS_UPDATE_DATE	HZ_CUST_ACCOUNTS	Account
SUSPENSION_DATE	HZ_CUST_ACCOUNTS	Account
TAX_CODE	HZ_CUST_ACCOUNTS	Account
TAX_HEADER_LEVEL_FLAG	HZ_CUST_ACCOUNTS	Account
TAX_ROUNDING_RULE	HZ_CUST_ACCOUNTS	Account

Attribute	Source	Data Source Name(s)
UNDER_RETURN_TOLERANCE	HZ_CUST_ACCOUNTS	Account
UNDER_SHIPMENT_TOLERANCE	HZ_CUST_ACCOUNTS	Account
WATCH_ACCOUNT_FLAG	HZ_CUST_ACCOUNTS	Account
WATCH_BALANCE_INDICATOR	HZ_CUST_ACCOUNTS	Account
WRITE_OFF_ADJUSTMENT_AMOUNT	HZ_CUST_ACCOUNTS	Account
WRITE_OFF_AMOUNT	HZ_CUST_ACCOUNTS	Account
WRITE_OFF_PAYMENT_AMOUNT	HZ_CUST_ACCOUNTS	Account
ACCOUNT_RECEIVABLE	HZ_FINANCIAL_NUMBERS. (FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'ACCOUNTS_RECEIVABLE')	Data Mining Aggregates
AVG_CALL_LENGTH	BIC_PARTY_SUMM	Data Mining Aggregates
AVG_CLOSED_SRS	BIC_PARTY_SUMM	Data Mining Aggregates
AVG_COMPLAINTS	BIC_PARTY_SUMM	Data Mining Aggregates
AVG_DISC_OFFERED	Derived using AMS_ACT_OFFERS and AMS_CAMPAIGN_SCHEDULES_VL fields	Data Mining Aggregates
AVG_HOLD_TIME	BIC_PARTY_SUMM	Data Mining Aggregates
AVG_LEN_OF_EMP	BIC_PARTY_SUMM	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
AVG_ORDER_AMOUNT	BIC_PARTY_SUMM. ORDER_AMT divided by ORDER_NUM	Data Mining Aggregates
AVG_RESOLVE_DAYS_1_MONTH	BIC_PARTY_SUMM.AVG_SR_RESL_TIME	Data Mining Aggregates
AVG_RESOLVE_DAYS_3_MONTHS	BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the last 3 months	Data Mining Aggregates
AVG_RESOLVE_DAYS_6_MONTHS	BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the last 6 months	Data Mining Aggregates
AVG_RESOLVE_DAYS_YEAR	BIC_PARTY_SUMM. AVG_SR_RESL_TIME over the past year	Data Mining Aggregates
AVG_TALK_TIME	BIC_PARTY_SUMM. AVG_TALK_TIME	Data Mining Aggregates
AVG_TRANSFERS_PER_SR	BIC_PARTY_SUMM	Data Mining Aggregates
AVG_UNITS_PER_ORDER	BIC_PARTY_SUMM. ORDER_QTY divided by ORDER_NUM	Data Mining Aggregates
AVG_WORKLOAD	BIC_PARTY_SUMM	Data Mining Aggregates
CAPITAL_AMOUNT	"HZ_FINANCIAL_NUMBERS.[FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME IN ('ISSUED_CAPITAL', 'PAID_IN_CAPITAL' 'NOMINAL_CAPITAL', 'AUTHORIZED_CAPITAL')]"	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
CAPITAL_TYPE_INDICATOR	HZ_FINANCIAL_NUMBERS.FINANCIAL_NUMBER_NAME (where FINANCIAL_NUMBER_NAME in ('ISSUED_CAPITAL' , 'PAID_IN_CAPITAL', 'NOMINAL_CAPITAL', 'AUTHORIZED_CAPITAL'))	Data Mining Aggregates
CLOSED_SRS	BIC_PARTY_SUMM	Data Mining Aggregates
COGS	BIC_PARTY_SUMM	Data Mining Aggregates
CONTRACT_AMT	BIC_PARTY_SUMM	Data Mining Aggregates
CONTRACT_DURATION	BIC_PARTY_SUMM	Data Mining Aggregates
CONTRACTS_CUML	BIC_PARTY_SUMM	Data Mining Aggregates
CURRENT_ASSETS	HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_CURRENT_ASSETS')	Data Mining Aggregates
CURRENT_LIABILITIES	HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_CURR_LIABILITIES')	Data Mining Aggregates
DAYS_SINCE_FIRST_CONTACT	Derived using MIN (AMS_LIST_HEADERS_VL.SENT_OUT_DATE) where SENT_OUT_DATE is not Null and AMS_LIST_ENTRIES fields	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
DAYS_SINCE_LAST_EVENT	MAX (AMS_EVENT_OFFERS_VL.EVENT_START_DATE) where PARTY_ID in (AMS_EVENT_REGISTRATIONS.ATTENDANT_PARTY_ID)	Data Mining Aggregates
DAYS_SINCE_LAST_TARGETED	Derived using MAX (AMS_LIST_HEADERS_VL. SENT_OUT_DATE) where party in AMS_LIST_ENTRIES. PARTY_ID	Data Mining Aggregates
DEBT_TO_INCOME_RATIO	HZ_FINANCIAL_NUMBERS .(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY Where FINANCIAL_NUMBER_NAME = 'LONG_TERM_DEBT')	Data Mining Aggregates
ESCALATED_SRS	BIC_PARTY_SUMM	Data Mining Aggregates
FIRST_CALL_CL_RATE	BIC_PARTY_SUMM	Data Mining Aggregates
GROSS_ANNUAL_INCOME	HZ_FINANCIAL_NUMBERS .(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'GROSS_INCOME')	Data Mining Aggregates
GROSS_ANNUAL_SALES	HZ_FINANCIAL_NUMBERS .(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'SALES')	Data Mining Aggregates
HZ_PARTY_SITE_USES.BEGIN_DATE and END_DATE for SITE_USE_TYPE = RESIDES_AT	HZ_PARTY_SITE_USES	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
INACTIVE_CONTRACTS	BIC_PARTY_SUMM	Data Mining Aggregates
LAST_TARGETED_CHANNEL_CODE	Derived using AMS_CAMPAIGN_SCHEDULES_VL AMS_LIST_HEADERS_VL and AMS_LIST_ENTRIES fields	Data Mining Aggregates
NET_PROFIT	HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME='PROFIT_BEFORE_TAX')	Data Mining Aggregates
NET_WORTH	HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'NET_WORTH')	Data Mining Aggregates
NEW_CONTRACTS	BIC_PARTY_SUMM	Data Mining Aggregates
NUM_OF_COMPLAINTS	BIC_PARTY_SUMM	Data Mining Aggregates
NUM_OF_INTERACTIONS	BIC_PARTY_SUMM	Data Mining Aggregates
NUM_OF_SR_1_MONTH	BIC_PARTY_SUMM. SRS_LOGGED	Data Mining Aggregates
NUM_OF_SR_3_MONTHS	SUM (BIC_PARTY_SUMM. SRS_LOGGED) over the last 3 months	Data Mining Aggregates
NUM_OF_SR_6_MONTHS	SUM (BIC_PARTY_SUMM. SRS_LOGGED) over the last 6 months	Data Mining Aggregates
NUM_OF_SR_YEAR	SUM (BIC_PARTY_SUMM. SRS_LOGGED) over the past year	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
NUM_OF_TRANSFERS	BIC_PARTY_SUMM	Data Mining Aggregates
NUM_TGT_BY_OFFR_TYP1	Derived using AMS_LIST_ENTRIES AMS_LIST_HEADERS_ALL AMS_CAMPAIGN_SCHEDULES_B AMS_ACT_OFFERS	Data Mining Aggregates
NUM_TGT_BY_OFFR_TYP2	Derived using AMS_LIST_ENTRIES AMS_LIST_HEADERS_ALL AMS_CAMPAIGN_SCHEDULES_B AMS_ACT_OFFERS	Data Mining Aggregates
NUM_TGT_BY_OFFR_TYP3	Derived using AMS_LIST_ENTRIES AMS_LIST_HEADERS_ALL AMS_CAMPAIGN_SCHEDULES_B AMS_ACT_OFFERS	Data Mining Aggregates
NUM_TGT_BY_OFFR_TYP4	Derived using AMS_LIST_ENTRIES AMS_LIST_HEADERS_ALL AMS_CAMPAIGN_SCHEDULES_B AMS_ACT_OFFERS	Data Mining Aggregates
NUM_TIMES_TARGETED	AMS_LIST_HEADERS_VL.SENT_OUT_DATE is not Null AND party is in AMS_LIST_ENTRIES. PARTY_ID	Data Mining Aggregates
NUM_TIMES_TARGETED_DIRECT	Derived using AMS_LIST_ENTRIES AMS_LIST_HEADERS_ALL AMS_CAMPAIGN_SCHEDULES_B AMS_MEDIA_VL	Data Mining Aggregates
NUM_TIMES_TARGETED_EMAIL	Derived using AMS_LIST_ENTRIES AMS_LIST_HEADERS_ALL AMS_CAMPAIGN_SCHEDULES_B AMS_MEDIA_VL	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
NUM_TIMES_TARGETED_TELEMKT	Derived using AMS_LIST_ENTRIES AMS_LIST_HEADERS_ALL AMS_CAMPAIGN_SCHEDULES_B AMS_MEDIA_VL	Data Mining Aggregates
NUM_TYPES_DISC_OFFERED	Derived using AMS_ACT_OFFERS And AMS_CAMPAIGN_SCHEDULES_VL fields	Data Mining Aggregates
ONTIME_PAYMENTS	BIC_PARTY_SUMM	Data Mining Aggregates
ONTIME_SHIP_PCT	BIC_PARTY_SUMM	Data Mining Aggregates
OPEN_CONTRACTS	BIC_PARTY_SUMM	Data Mining Aggregates
OPEN_SRS	BIC_PARTY_SUMM	Data Mining Aggregates
ORDER_LINES_DELIVERED	BIC_PARTY_SUMM	Data Mining Aggregates
ORDER_LINES_ONTIME	BIC_PARTY_SUMM	Data Mining Aggregates
ORDER_QTY_CUML	BIC_PARTY_SUMM	Data Mining Aggregates
ORDER_RECENCY	BIC_PARTY_SUMM	Data Mining Aggregates
PARTY_ID	--	Data Mining Aggregates
PAYMENTS	BIC_PARTY_SUMM	Data Mining Aggregates
PERCT_CALL_REWORK	BIC_PARTY_SUMM	Data Mining Aggregates
PRODUCTS	BIC_PARTY_SUMM	Data Mining Aggregates
REFERALS	BIC_PARTY_SUMM	Data Mining Aggregates
RENEWED_CONTRACTS	BIC_PARTY_SUMM	Data Mining Aggregates
REOPENED_SRS	BIC_PARTY_SUMM	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
RETAINED_EARNINGS	HZ_FINANCIAL_NUMBERS .(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'RETAINED_EARNINGS')	Data Mining Aggregates
RETURN_BY_VALUE	BIC_PARTY_SUMM	Data Mining Aggregates
RETURN_BY_VALUE_PCT	BIC_PARTY_SUMM	Data Mining Aggregates
RETURNS	BIC_PARTY_SUMM	Data Mining Aggregates
SALES	BIC_PARTY_SUMM	Data Mining Aggregates
TIMES_TARGETED_12_MONTH	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last year	Data Mining Aggregates
TIMES_TARGETED_3_MONTH	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 3 months	Data Mining Aggregates
TIMES_TARGETED_6_MONTH	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 6 months	Data Mining Aggregates
TIMES_TARGETED_9_MONTH	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last 9 months	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
TIMES_TARGETED_MONTH	Derived using AMS_LIST_HEADERS_VL. SENT_OUT_DATE (if not Null) and party in AMS_LIST_ENTRIES. PARTY_ID for last month	Data Mining Aggregates
TOT_CALLS	BIC_PARTY_SUMM	Data Mining Aggregates
TOT_NUM_ORDER_3_MONTHS	SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past 3 months	Data Mining Aggregates
TOT_NUM_ORDER_6_MONTHS	SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past 6 months	Data Mining Aggregates
TOT_NUM_ORDER_9_MONTHS	SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past 9 months	Data Mining Aggregates
TOT_NUM_ORDER_YEAR	SUM (BIC_PARTY_SUMM.ORDER_QTY) over the past year	Data Mining Aggregates
TOT_ORDER_AMOUNT_3_MONTHS	SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past 3 months	Data Mining Aggregates
TOT_ORDER_AMOUNT_6_MONTHS	SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past 6 months	Data Mining Aggregates
TOT_ORDER_AMOUNT_9_MONTHS	SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past 9 months	Data Mining Aggregates
TOT_ORDER_AMOUNT_YEAR	SUM (BIC_PARTY_SUMM.ORDER_AMT) over the past year	Data Mining Aggregates

Attribute	Source	Data Source Name(s)
TOTAL_ASSETS	HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'TOTAL_ASSETS')	Data Mining Aggregates
TOTAL_DEBT_OUTSTANDING	HZ_FINANCIAL_NUMBERS.(FINANCIAL_NUMBER and FINANCIAL_NUMBER_CURRENCY where FINANCIAL_NUMBER_NAME = 'LONG_TERM_DEBT')	Data Mining Aggregates
TOTAL_SR_RESPONSE_TIME	BIC_PARTY_SUMM	Data Mining Aggregates
ARC_USED_FOR_OBJECT	AMS_DM_SOURCE	Data Mining Scores
CONTINUOUS_SCORE	AMS_DM_SOURCE	Data Mining Scores
CREATED_BY	ams_dm_scores_all_b	Data Mining Scores
CREATION_DATE	ams_dm_scores_all_b	Data Mining Scores
DECILE	AMS_DM_SOURCE	Data Mining Scores
LAST_UPDATE_DATE	ams_dm_scores_all_b	Data Mining Scores
LAST_UPDATE_LOGIN	ams_dm_scores_all_b	Data Mining Scores
LAST_UPDATED_BY	ams_dm_scores_all_b	Data Mining Scores
MODEL_ID	ams_dm_scores_all_b	Data Mining Scores
MODEL_NAME	ams_dm_models_all_tl	Data Mining Scores
MODEL_TYPE	ams_dm_scores_all_tl	Data Mining Scores
PARTY_ID	AMS_DM_SOURCE	Data Mining Scores

Attribute	Source	Data Source Name(s)
SCORE_ID	ams_dm_scores_all_b	Data Mining Scores
SCORE_NAME	ams_dm_scores_all_tl	Data Mining Scores
USED_FOR_OBJECT_ID	AMS_DM_SOURCE	Data Mining Scores
BEGIN_DATE	HZ_EMPLOYMENT_HISTORY	Employment History
BRANCH	HZ_EMPLOYMENT_HISTORY	Employment History
EMPLOYED_AS_TITLE	HZ_EMPLOYMENT_HISTORY	Employment History
EMPLOYED_BY_DIVISION_NAME	HZ_EMPLOYMENT_HISTORY	Employment History
EMPLOYED_BY_NAME_COMPANY	HZ_EMPLOYMENT_HISTORY	Employment History
EMPLOYMENT_HISTORY_ID	HZ_EMPLOYMENT_HISTORY	Employment History
END_DATE	HZ_EMPLOYMENT_HISTORY	Employment History
MILITARY_RANK	HZ_EMPLOYMENT_HISTORY	Employment History
PARTY_ID	HZ_EMPLOYMENT_HISTORY	Employment History
RESPONSIBILITY	HZ_EMPLOYMENT_HISTORY	Employment History
SERVED	HZ_EMPLOYMENT_HISTORY	Employment History
STATION	HZ_EMPLOYMENT_HISTORY	Employment History

Attribute	Source	Data Source Name(s)
SUPERVISOR_NAME	HZ_EMPLOYMENT_HISTORY	Employment History
ACTIVE_END_DATE	CSI_ITEM_INSTANCES	Install Base Details
ACTIVE_START_DATE	CSI_ITEM_INSTANCES	Install Base Details
ACTUAL_RETURN_DATE	CSI_ITEM_INSTANCES	Install Base Details
CATEGORY_DESC	CSI_ITEM_INSTANCES	Install Base Details
CITY	CSI_ITEM_INSTANCES	Install Base Details
COMPLETENESS_FLAG	CSI_ITEM_INSTANCES	Install Base Details
CONCAT_CAT_PARENTAGE	CSI_ITEM_INSTANCES	Install Base Details
CONCATENATED_SEGMENTS	CSI_ITEM_INSTANCES	Install Base Details
CONTEXT	CSI_ITEM_INSTANCES	Install Base Details
COUNTRY	CSI_ITEM_INSTANCES	Install Base Details
COUNTY	CSI_ITEM_INSTANCES	Install Base Details
CREATED_BY	CSI_ITEM_INSTANCES	Install Base Details
CREATION_COMPLETE_FLAG	CSI_ITEM_INSTANCES	Install Base Details
CREATION_DATE	CSI_ITEM_INSTANCES	Install Base Details
DESCRIPTION	CSI_ITEM_INSTANCES	Install Base Details
INSTALL_DATE	CSI_ITEM_INSTANCES	Install Base Details
INSTANCE_DESCRIPTION	CSI_ITEM_INSTANCES	Install Base Details

Attribute	Source	Data Source Name(s)
INSTANCE_ID	CSI_ITEM_INSTANCES	Install Base Details
INSTANCE_NUMBER	CSI_ITEM_INSTANCES	Install Base Details
INSTANCE_STATUS_ID	CSI_ITEM_INSTANCES	Install Base Details
INSTANCE_USAGE_MEANING	CSI_ITEM_INSTANCES	Install Base Details
INV_MASTER_ORGANIZATION_ID	CSI_ITEM_INSTANCES	Install Base Details
INV_ORGANIZATION_ID	CSI_ITEM_INSTANCES	Install Base Details
INVENTORY_ITEM_ID	CSI_ITEM_INSTANCES	Install Base Details
ITEM_DESCRIPTION	CSI_ITEM_INSTANCES	Install Base Details
ITEM_TYPE	CSI_ITEM_INSTANCES	Install Base Details
LAST_CUST_PO_NUMBER	CSI_ITEM_INSTANCES	Install Base Details
LAST_HEADER_ID	CSI_ITEM_INSTANCES	Install Base Details
LAST_LINE_ID	CSI_ITEM_INSTANCES	Install Base Details
LAST_LINE_NUMBER	CSI_ITEM_INSTANCES	Install Base Details
LAST_OE_ORDER_LINE_ID	CSI_ITEM_INSTANCES	Install Base Details
LAST_ORDER_NUMBER	CSI_ITEM_INSTANCES	Install Base Details
LOCATION_ID	CSI_ITEM_INSTANCES	Install Base Details
LOCATION_TYPE_CODE	CSI_ITEM_INSTANCES	Install Base Details
LOT_CONTROL_CODE	CSI_ITEM_INSTANCES	Install Base Details
MANUALLY_CREATED_FLAG	CSI_ITEM_INSTANCES	Install Base Details

Attribute	Source	Data Source Name(s)
NAME	CSI_ITEM_INSTANCES	Install Base Details
OWNER_PARTY_ACCOUNT_ID	CSI_ITEM_INSTANCES	Install Base Details
OWNER_PARTY_ID	CSI_ITEM_INSTANCES	Install Base Details
PADDED_CONCATENATED_SEGMENTS	CSI_ITEM_INSTANCES	Install Base Details
POSTAL_CODE	CSI_ITEM_INSTANCES	Install Base Details
PROVINCE	CSI_ITEM_INSTANCES	Install Base Details
QUANTITY	CSI_ITEM_INSTANCES	Install Base Details
RETURN_BY_DATE	CSI_ITEM_INSTANCES	Install Base Details
SERIAL_NUMBER_CONTROL_CODE	CSI_ITEM_INSTANCES	Install Base Details
SHIPPED_DATE	CSI_ITEM_INSTANCES	Install Base Details
STATE	CSI_ITEM_INSTANCES	Install Base Details
TERMINATED_FLAG	CSI_ITEM_INSTANCES	Install Base Details
UNIT_OF_MEASURE	CSI_ITEM_INSTANCES	Install Base Details
ACTION	JTF_IH_ACTIONS_TL	Interactions
ACTION_ID	JTF_IH_ACTIVITIES	Interactions
ACTION_ITEM	JTF_IH_ACTION_ITEMS_TL	Interactions
ACTION_ITEM_ID	JTF_IH_ACTIVITIES	Interactions
ACTIVE	JTF_IH_ACTIVITIES	Interactions
ACTIVITY	JTF_IH_ACTION_ITEMS_TL	Interactions

Attribute	Source	Data Source Name(s)
ACTIVITY_ID	JTF_IH_ACTIVITIES	Interactions
CREATION_DATE	JTF_IH_ACTIVITIES	Interactions
CUST_ACCOUNT_ID	JTF_IH_INTERACTIONS	Interactions
DIRECTION	JTF_IH_ACTIVITIES	Interactions
DOC_ID	JTF_IH_MEDIA_ITEMS	Interactions
DOC_REF	JTF_IH_ACTIVITIES	Interactions
END_DATE_TIME	JTF_IH_ACTIVITIES	Interactions
HANDLER_ID	JTF_IH_ACTIVITIES	Interactions
INTERACTION_ID	JTF_IH_INTERACTIONS	Interactions
MEDIA_ID	JTF_IH_ACTIVITIES	Interactions
MEDIA_ITEM_TYPE	JTF_IH_ACTIVITIES	Interactions
OBJECT_ID	JTF_IH_MEDIA_ITEMS	Interactions
OUTCOME_CODE	JTF_IH_ACTIVITIES	Interactions
OUTCOME_DESCRIPTION	JTF_IH_OUTCOMES_TL	Interactions
OUTCOME_ID	JTF_IH_ACTIVITIES	Interactions
PARTY_ID	JTF_IH_INTERACTIONS	Interactions
POSITIVE_RESPONSE_FLAG	JTF_IH_RESULTS_TL	Interactions
REASON_CODE	JTF_IH_REASONS_TL	Interactions
REASON_DESCRIPTION	JTF_IH_ACTIVITIES	Interactions
REASON_ID	JTF_IH_INTERACTIONS	Interactions

Attribute	Source	Data Source Name(s)
RESOURCE_ID	JTF_IH_RESULTS_TL	Interactions
RESULT_CODE	JTF_IH_ACTIVITIES	Interactions
RESULT_DESCRIPTION	JTF_IH_ACTIVITIES	Interactions
RESULT_ID	JTF_IH_OUTCOMES_TL	Interactions
SCRIPT_ID	JTF_IH_REASONS_TL	Interactions
SCRIPT_TRANS_ID	JTF_IH_RESULTS_TL	Interactions
SOURCE_CODE	JTF_IH_ACTIVITIES	Interactions
SOURCE_CODE_ID	JTF_IH_ACTIVITIES	Interactions
START_DATE_TIME	JTF_IH_ACTIVITIES	Interactions
PARTY_NAME	HZ_PARTIES	Interactions, Organization, and Person
ACCEPT_FLAG	AS_SALES_LEADS	Leads
ADDRESS_ID	AS_SALES_LEADS	Leads
ASSIGN_SALES_GROUP_ID	AS_SALES_LEADS	Leads
ASSIGN_TO_PERSON_ID	AS_SALES_LEADS	Leads
ASSIGN_TO_SALESFORCE_ID	AS_SALES_LEADS	Leads
BUDGET_AMOUNT	AS_SALES_LEADS	Leads
BUDGET_STATUS	AS_LOOKUPS	Leads
BUDGET_STATUS_CODE	AS_SALES_LEADS	Leads
CATEGORY_ID	AS_SALES_LEAD_LINES	Leads

Attribute	Source	Data Source Name(s)
CATEGORY_SET_ID	AS_SALES_LEAD_LINES	Leads
CHANNEL_CODE	AS_SALES_LEADS	Leads
CLOSE_REASON	AS_SALES_LEADS	Leads
CONTACT_ROLE_CODE	AS_SALES_LEADS	Leads
CREATION_DATE	AS_SALES_LEADS	Leads
CURRENCY_CODE	AS_SALES_LEADS	Leads
CUSTOMER_ID	AS_SALES_LEADS	Leads
DECISION_TIMEFRAME_CODE	AS_SALES_LEADS	Leads
DESCRIPTION	AS_SALES_LEADS	Leads
GROUP_NAME	AS_LOOKUPS	Leads
INVENTORY_ITEM_ID	AS_SALES_LEAD_LINES	Leads
LAST_UPDATE_DATE	AS_SALES_LEADS	Leads
LEAD_NUMBER	AS_SALES_LEADS	Leads
LEAD_RANK_CODE	AS_SALES_LEADS	Leads
LEAD_RANK_ID	AS_SALES_LEADS	Leads
LEAD_STATUS	AS_STATUSES_TL	Leads
ORGANIZATION_ID	AS_SALES_LEAD_LINES	Leads
ORIG_SYSTEM_REFERENCE	AS_SALES_LEADS	Leads
PRIMARY_CNT_PERSON_PARTY_ID	AS_SALES_LEADS	Leads

Attribute	Source	Data Source Name(s)
PRIMARY_CONTACT_PARTY_ID	AS_SALES_LEADS	Leads
PRIMARY_CONTACT_PHONE_ID	AS_SALES_LEADS	Leads
QUALIFIED_FLAG	AS_SALES_LEADS	Leads
QUANTITY	AS_SALES_LEAD_LINES	Leads
RANK	AS_SALES_LEAD_RANKS_TL	Leads
SALES_CHANNEL	ASO_I_SALES_CHANNELS_V	Leads
SALES_LEAD_ID	AS_SALES_LEADS	Leads
SOURCE_PROMOTION_CODE	AMS_P_SOURCE_CODES_V	Leads
SOURCE_PROMOTION_ID	AS_SALES_LEADS	Leads
SOURCE_PROMOTION_NAME	AMS_P_SOURCE_CODES_V	Leads
STATUS_CODE	AS_SALES_LEADS	Leads
TIME_FRAME	AS_SALES_LEADS	Leads
UNIT_OF_MEASURE_TL	MTL_UNITS_OF_MEASURE	Leads
UOM_CODE	AS_SALES_LEAD_LINES	Leads
URGENT_FLAG	AS_SALES_LEADS	Leads
VEH_RESP_CODE_MEANING	AS_LOOKUPS	Leads
VEHICLE_RESPONSE_CODE	AS_SALES_LEADS	Leads

Attribute	Source	Data Source Name(s)
CONCAT_CAT_PARENTAGE	ENI_PROD_DEN_HRCHY_PARENTS_V	Leads and Order Details
CONCATENATED_SEGMENTS	MTL_SYSTEM_ITEMS_VL	Leads and Order Details
ITEM_DESCRIPTION	MTL_SYSTEM_ITEMS_VL	Leads and Order Details
CATEGORY_DESC	ENI_PROD_DEN_HRCHY_PARENTS_V	Leads and Order Details
RESOURCE_NAME	JTF_RS_RESOURCE_EXTNS	Leads and Sales Access
ACTUAL_ARRIVAL_DATE	OE_ORDER_LINES_ALL	Order Details
ACTUAL_SHIPMENT_DATE	OE_ORDER_LINES_ALL	Order Details
ATO_LINE_ID	OE_ORDER_LINES_ALL	Order Details
BOOKED_DATE	OE_ORDER_HEADERS_ALL	Order Details
BOOKED_FLAG	OE_ORDER_LINES_ALL	Order Details
CANCELLED_FLAG	OE_ORDER_LINES_ALL	Order Details
CANCELLED_QUANTITY	OE_ORDER_LINES_ALL	Order Details
CREATION_DATE	OE_ORDER_LINES_ALL	Order Details
EXTENDED_PRICE	NVL(OL.UNIT_SELLING_PRICE,0)*(NVL(OL.ORDERED_QUANTITY,0) - NVL(OL.CANCELLED_QUANTITY,0))	Order Details
FULFILLED_QUANTITY	OE_ORDER_LINES_ALL	Order Details
HEADER_ID	OE_ORDER_LINES_ALL	Order Details
INVENTORY_ITEM_ID	MTL_SYSTEM_ITEMS_VL	Order Details

Attribute	Source	Data Source Name(s)
INVOICE_TO_ORG_ID	OE_ORDER_LINES_ALL	Order Details
ITEM_NUMBER	MTL_SYSTEM_ITEMS_VL	Order Details
LAST_UPDATE_DATE	OE_ORDER_LINES_ALL	Order Details
LINE_CATEGORY_CODE	OE_ORDER_LINES_ALL	Order Details
LINE_ID	OE_ORDER_LINES_ALL	Order Details
LINE_NUMBER	OE_ORDER_LINES_ALL	Order Details
LINE_TYPE_ID	OE_ORDER_LINES_ALL	Order Details
MARKETING_SOURCE_CODE_ID	OE_ORDER_HEADERS_ALL	Order Details
OPEN_FLAG	OE_ORDER_LINES_ALL	Order Details
OPTION_NUMBER	OE_ORDER_LINES_ALL	Order Details
ORDER_QUANTITY_UOM	OE_ORDER_LINES_ALL	Order Details
ORDER_SOURCE_ID	OE_ORDER_LINES_ALL	Order Details
ORDERED_DATE	OE_ORDER_HEADERS_ALL	Order Details
ORDERED_QUANTITY	OE_ORDER_LINES_ALL	Order Details
ORG_ID	OE_ORDER_HEADERS_ALL	Order Details
PARTY_ID	HZ_CUST_ACCOUNTS	Order Details
PRICING_QUANTITY	OE_ORDER_LINES_ALL	Order Details
PRICING_QUANTITY_UOM	OE_ORDER_LINES_ALL	Order Details
PROMISE_DATE	OE_ORDER_LINES_ALL	Order Details
REQUEST_DATE	OE_ORDER_LINES_ALL	Order Details

Attribute	Source	Data Source Name(s)
SALES_CHANNEL_CODE	OE_ORDER_HEADERS_ALL	Order Details
SCHEDULE_ARRIVAL_DATE	OE_ORDER_LINES_ALL	Order Details
SCHEDULE_SHIP_DATE	OE_ORDER_LINES_ALL	Order Details
SHIP_TO_CONTACT_ID	OE_ORDER_LINES_ALL	Order Details
SHIP_TO_ORG_ID	OE_ORDER_LINES_ALL	Order Details
SHIPMENT_PRIORITY_CODE	OE_ORDER_LINES_ALL	Order Details
SHIPPED_QUANTITY	OE_ORDER_LINES_ALL	Order Details
SHIPPING_METHOD_CODE	OE_ORDER_LINES_ALL	Order Details
SHIPPING_QUANTITY	OE_ORDER_LINES_ALL	Order Details
SHIPPING_QUANTITY_UOM	OE_ORDER_LINES_ALL	Order Details
SOLD_FROM_ORG_ID	OE_ORDER_HEADERS_ALL	Order Details
SOLD_TO_ORG_ID	OE_ORDER_HEADERS_ALL	Order Details
TRANSACTIONAL_CURR_CODE	OE_ORDER_HEADERS_ALL	Order Details
UNIT_LIST_PRICE	OE_ORDER_LINES_ALL	Order Details
UNIT_SELLING_PRICE	OE_ORDER_LINES_ALL	Order Details
ANALYSIS_FY	HZ_ORGANIZATION_PROFILES	Organization
AVG_HIGH_CREDIT	HZ_ORGANIZATION_PROFILES	Organization

Attribute	Source	Data Source Name(s)
BRANCH_FLAG	HZ_ORGANIZATION_PROFILES	Organization
CEO_NAME	HZ_ORGANIZATION_PROFILES	Organization
CEO_TITLE	HZ_ORGANIZATION_PROFILES	Organization
CONG_DIST_CODE	HZ_ORGANIZATION_PROFILES	Organization
CONTROL_YR	HZ_ORGANIZATION_PROFILES	Organization
CORPORATION_CLASS	HZ_ORGANIZATION_PROFILES	Organization
CREDIT_SCORE	HZ_ORGANIZATION_PROFILES	Organization
CURR_FY_POTENTIAL_REVENUE	HZ_ORGANIZATION_PROFILES	Organization
CUSTOMER_KEY	HZ_PARTIES	Organization
DB_RATING	HZ_ORGANIZATION_PROFILES	Organization
DISADV_8A_IND	HZ_ORGANIZATION_PROFILES	Organization
EFFECTIVE_END_DATE	HZ_ORGANIZATION_PROFILES	Organization
EFFECTIVE_START_DATE	HZ_ORGANIZATION_PROFILES	Organization
EMP_AT_PRIMARY_ADR	HZ_ORGANIZATION_PROFILES	Organization

Attribute	Source	Data Source Name(s)
EMPLOYEES_TOTAL	HZ_ORGANIZATION_PROFILES	Organization
EXPORT_IND	HZ_ORGANIZATION_PROFILES	Organization
FAILURE_SCORE	HZ_ORGANIZATION_PROFILES	Organization
FAILURE_SCORE_NATL_PERCENTILE	HZ_ORGANIZATION_PROFILES	Organization
FISCAL_YEAREND_MONTH	HZ_ORGANIZATION_PROFILES	Organization
GLOBAL_FAILURE_SCORE	HZ_ORGANIZATION_PROFILES	Organization
GSA_INDICATOR_FLAG	HZ_PARTIES	Organization
HIGH_CREDIT	HZ_ORGANIZATION_PROFILES	Organization
HQ_BRANCH_IND	HZ_ORGANIZATION_PROFILES	Organization
IMPORT_IND	HZ_ORGANIZATION_PROFILES	Organization
INCORP_YEAR	HZ_ORGANIZATION_PROFILES	Organization
INTERNAL_FLAG	HZ_ORGANIZATION_PROFILES	Organization
LANGUAGE_NAME	HZ_PARTIES	Organization
LEGAL_STATUS	HZ_ORGANIZATION_PROFILES	Organization
LINE_OF_BUSINESS	HZ_ORGANIZATION_PROFILES	Organization

Attribute	Source	Data Source Name(s)
LOCAL_BUS_IDEN_TYPE	HZ_ORGANIZATION_PROFILES	Organization
LOCAL_BUS_IDENTIFIER	HZ_ORGANIZATION_PROFILES	Organization
PRIMARY_CONTACT_ID	HZ_ORGANIZATION_PROFILES	Organization
STATUS	HZ_PARTIES	Organization
TOTAL_EMPLOYEES_IND	HZ_ORGANIZATION_PROFILES	Organization
VALIDATED_FLAG	HZ_PARTIES	Organization
PARTY_TYPE	HZ_PARTIES	Organization and Organization Contact
GROUP_TYPE	HZ_PARTIES	Organization and Organization Contact
NEXT_FY_POTENTIAL_REVENUE	HZ_ORGANIZATION_PROFILES	Organization and Organization Contact
ORIG_SYSTEM_REFERENCE	HZ_PARTIES	Organization and Organization Contact
PUBLIC_PRIVATE_OWNERSHIP_FLAG	HZ_ORGANIZATION_PROFILES	Organization and Organization Contact
TAX_NAME	HZ_PARTIES	Organization and Organization Contact
OOB_IND	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
ORGANIZATION_NAME	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
ORGANIZATION_TYPE	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile

Attribute	Source	Data Source Name(s)
PARENT_SUB_IND	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
PAYDEX_NORM	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
PAYDEX_SCORE	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
PAYDEX_THREE_MONTHS_AGO	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
PREF_FUNCTIONAL_CURRENCY	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
REGISTRATION_TYPE	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
SIC_CODE	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
SIC_CODE_TYPE	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
SMALL_BUS_IND	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
TOTAL_EMP_EST_IND	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
TOTAL_EMP_MIN_IND	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
TOTAL_NUM_OF_ORDERS	HZ_PARTIES	Organization and Organization Profile
TOTAL_ORDERED_AMOUNT	HZ_PARTIES	Organization and Organization Profile
TOTAL_PAYMENTS	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile

Attribute	Source	Data Source Name(s)
WOMAN_OWNED_IND	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
YEAR_ESTABLISHED	HZ_ORGANIZATION_PROFILES	Organization and Organization Profile
LAST_ORDERED_DATE	HZ_PARTIES	Organization and Person
PARTY_NUMBER	HZ_PARTIES	Organization and Person
SALUTATION	HZ_PARTIES	Organization and Person
CONTACT_ID	HZ_PARTIES	Organization Contact
CONTACT_NUMBER	HZ_ORG_CONTACTS	Organization Contact
CUSTOMER_KEY	HZ_PARTIES	Organization Contact
DECISION_MAKER_FLAG	HZ_ORG_CONTACTS	Organization Contact
DEPARTMENT	HZ_ORG_CONTACTS	Organization Contact
DEPARTMENT_CODE	HZ_ORG_CONTACTS	Organization Contact
GENDER	HZ_PARTIES	Organization Contact
HQ_BRANCH_IND	HZ_PARTIES	Organization Contact
JOB_TITLE	HZ_ORG_CONTACTS	Organization Contact
JOB_TITLE_CODE	HZ_ORG_CONTACTS	Organization Contact
MANAGED_BY	HZ_ORG_CONTACTS	Organization Contact
NATIVE_LANGUAGE	HZ_ORG_CONTACTS	Organization Contact
ORGANIZATION_ID	HZ_PARTIES	Organization Contact
ORGANIZATION_PARTY_NAME	HZ_PARTIES	Organization Contact

Attribute	Source	Data Source Name(s)
PARTY_CONTACT_NAME	HZ_ORG_CONTACTS	Organization Contact
PERSON_ACADEMIC_TITLE	HZ_PARTIES	Organization Contact
PERSON_PREVIOUS_LAST_NAME	HZ_PARTIES	Organization Contact
PHONE_COUNTRY_CODE	HZ_PARTIES	Organization Contact
PHONE_EXTENSION	HZ_PARTIES	Organization Contact
PHONE_NUMBER	HZ_PARTIES	Organization Contact
RANK	HZ_ORG_CONTACTS	Organization Contact
RELATIONSHIP_CODE	HZ_RELATIONSHIPS	Organization Contact
ROLE_TYPE	HZ_PARTIES	Organization Contact
SIC_CODE	HZ_PARTIES	Organization Contact
SIC_CODE_TYPE	HZ_PARTIES	Organization Contact
TITLE	HZ_PARTIES	Organization Contact
VALIDATED_FLAG	HZ_PARTIES	Organization Contact
EMAIL_ADDRESS	HZ_PARTIES	Organization Contact and Person
MAIL_STOP	HZ_ORG_CONTACTS	Organization Contact and Person
PARTY_SITE_ID	HZ_PARTIES	Organization Contact and Person
PERSON_FIRST_NAME	HZ_PARTIES	Organization Contact and Person

Attribute	Source	Data Source Name(s)
PERSON_LAST_NAME	HZ_PARTIES	Organization Contact and Person
PERSON_MIDDLE_NAME	HZ_PARTIES	Organization Contact and Person
PERSON_NAME_SUFFIX	HZ_PARTIES	Organization Contact and Person
PERSON_PRE_NAME_ADJUNCT	HZ_PARTIES	Organization Contact and Person
PHONE_AREA_CODE	HZ_PARTIES	Organization Contact and Person
PERSON_IDENTIFIER	HZ_PARTIES	Organization Contact and Person Profile
MINORITY_OWNED_IND	HZ_ORGANIZATION_PROFILES	Organization Profile
MINORITY_OWNED_TYPE	HZ_ORGANIZATION_PROFILES	Organization Profile
PARTY_ID	HZ_ORGANIZATION_PROFILES	Organization Profile
TAX_NAME	HZ_ORGANIZATION_PROFILES	Organization Profile
TAX_REFERENCE	HZ_ORGANIZATION_PROFILES	Organization Profile
TOTAL_EMPLOYEES_TEXT	HZ_ORGANIZATION_PROFILES	Organization Profile
ADDRESS4	HZ_PARTIES	Organization and Organization Contact
DUNS_NUMBER	HZ_PARTIES	Organization and Organization Contact

Attribute	Source	Data Source Name(s)
POSTAL_CODE	HZ_PARTIES	Organization and Organization Contact
PROVINCE	HZ_PARTIES	Organization and Organization Contact
REFERENCE_USE_FLAG	HZ_PARTIES	Organization, Organization Contact, and Person
COUNTY	HZ_PARTIES	Organization, Organization Contact, and Person
KNOWN_AS	HZ_PARTIES	Organization, Organization Contact, and Person Profile
TAX_REFERENCE	HZ_PARTIES	Organization, Organization Contact, Person
ADDRESS1	HZ_PARTIES	Organization, Organization Contact, Person, and Account
ADDRESS2	HZ_PARTIES	Organization, Organization Contact, Person, and Account
ADDRESS3	HZ_PARTIES	Organization, Organization Contact, Person, and Account
CITY	HZ_PARTIES	Organization, Organization Contact, Person, and Account
COUNTRY	HZ_PARTIES	Organization, Organization Contact, Person, and Account
STATE	HZ_PARTIES	Organization, Organization Contact, Person, and Account
URL	HZ_PARTIES	Organization, Organization Contact, Person, and Account
JGZZ_FISCAL_CODE	HZ_PARTIES	Organization, Organization Contact, Person, Person Profile

Attribute	Source	Data Source Name(s)
RENT_OWN_IND	HZ_ORGANIZATION_PROFILES	Organization, Organization Contact, Person, Person Profile
PARTY_ID	HZ_PARTIES	Organization, Person, and Organization Contact
BEST_TIME_CONTACT_BEGIN	HZ_ORGANIZATION_PROFILES	Organization, Person, and Person Profile
BEST_TIME_CONTACT_END	HZ_ORGANIZATION_PROFILES	Organization, Person, and Person Profile
CUSTOMER_KEY	HZ_PARTIES	Person
LANGUAGE	HZ_PARTY_SITES	Person
LAST_ORDERED_DATE	HZ_PARTIES	Person
PARTY_SITE_NAME	HZ_PARTY_SITES	Person
PHONE_COUNTRY_CODE	HZ_CONTACT_POINTS	Person
PHONE_EXTENSION	HZ_CONTACT_POINTS	Person
PHONE_NUMBER	HZ_CONTACT_POINTS	Person
AGE	trunc(months_between(sysdate date_of_birth) / 12,0)	Person and Person Profile
DATE_OF_BIRTH	HZ_PERSON_PROFILES	Person and Person Profile
DATE_OF_DEATH	HZ_PERSON_PROFILES	Person and Person Profile
DECLARED_ETHNICITY	HZ_PERSON_PROFILES	Person and Person Profile
GENDER	HZ_PERSON_PROFILES	Person and Person Profile
HEAD_OF_HOUSEHOLD_FLAG	HZ_PERSON_PROFILES	Person and Person Profile

Attribute	Source	Data Source Name(s)
HOUSEHOLD_INCOME	HZ_PERSON_PROFILES	Person and Person Profile
HOUSEHOLD_SIZE	HZ_PERSON_PROFILES	Person and Person Profile
INTERNAL_FLAG	HZ_PERSON_PROFILES	Person and Person Profile
MARITAL_STATUS	HZ_PERSON_PROFILES	Person and Person Profile
MARITAL_STATUS_EFFECTIVE_DATE	HZ_PERSON_PROFILES	Person and Person Profile
PERSON_NAME	HZ_PERSON_PROFILES	Person and Person Profile
PERSONAL_INCOME	HZ_PERSON_PROFILES	Person and Person Profile
PLACE_OF_BIRTH	HZ_PERSON_PROFILES	Person and Person Profile
COURSE_MAJOR	HZ_EDUCATION	Person Education
DEGREE_RECEIVED	HZ_EDUCATION	Person Education
EDUCATION_ID	HZ_EDUCATION	Person Education
LAST_DATE_ATTENDED	HZ_EDUCATION	Person Education
PARTY_ID	HZ_EDUCATION	Person Education
SCHOOL_ATTENDED_NAME	HZ_EDUCATION	Person Education
START_DATE_ATTENDED	HZ_EDUCATION	Person Education
TYPE_OF_SCHOOL	HZ_EDUCATION	Person Education
INTEREST_NAME	HZ_PERSON_INTEREST	Person Interest
INTEREST_TYPE_CODE	HZ_PERSON_INTEREST	Person Interest
LEVEL_OF_INTEREST	HZ_PERSON_INTEREST	Person Interest

Attribute	Source	Data Source Name(s)
LEVEL_OF_PARTICIPATIO N	HZ_PERSON_INTEREST	Person Interest
PARTY_ID	HZ_PERSON_INTEREST	Person Interest
PERSON_INTEREST_ID	HZ_PERSON_INTEREST	Person Interest
SINCE	HZ_PERSON_INTEREST	Person Interest
SUB_INTEREST_TYPE_COD E	HZ_PERSON_INTEREST	Person Interest
TEAM	HZ_PERSON_INTEREST	Person Interest
AMS_PERSON_PROFILE_ID	HZ_PERSON_PROFILES	Person Profile
CONTENT_SOURCE_TYPE	HZ_PERSON_PROFILES	Person Profile
DECLARED_ETHNICITY	HZ_PERSON_PROFILES	Person Profile
PARTY_ID	HZ_PERSON_PROFILES	Person Profile
PERSON_IDEN_TYPE	HZ_PERSON_PROFILES	Person Profile
PERSON_PERVIOUS_LAST_ NAME	HZ_PERSON_PROFILES	Person Profile
TAX_REFERENCE	HZ_PERSON_PROFILES	Person Profile
ACCOUNTS1	FEM_PARTY_PROFITABILIT Y	Profitability
ACCOUNTS2	FEM_PARTY_PROFITABILIT Y	Profitability
ACCOUNTS3	FEM_PARTY_PROFITABILIT Y	Profitability
ACCOUNTS4	FEM_PARTY_PROFITABILIT Y	Profitability

Attribute	Source	Data Source Name(s)
ACCOUNTS5	FEM_PARTY_PROFITABILITY	Profitability
BALANCE1	FEM_PARTY_PROFITABILITY	Profitability
BALANCE2	FEM_PARTY_PROFITABILITY	Profitability
BALANCE3	FEM_PARTY_PROFITABILITY	Profitability
BALANCE4	FEM_PARTY_PROFITABILITY	Profitability
BALANCE5	FEM_PARTY_PROFITABILITY	Profitability
CACC_TOTAL	FEM_PARTY_PROFITABILITY	Profitability
CACC1	FEM_PARTY_PROFITABILITY	Profitability
CACC2	FEM_PARTY_PROFITABILITY	Profitability
CACC3	FEM_PARTY_PROFITABILITY	Profitability
CACC4	FEM_PARTY_PROFITABILITY	Profitability
CACC5	FEM_PARTY_PROFITABILITY	Profitability
CONTRIB_AFTER_CPTL_CHG	FEM_PARTY_PROFITABILITY	Profitability
EXPENSE_TOTAL	FEM_PARTY_PROFITABILITY	Profitability

Attribute	Source	Data Source Name(s)
EXPENSE1	FEM_PARTY_PROFITABILITY	Profitability
EXPENSE2	FEM_PARTY_PROFITABILITY	Profitability
EXPENSE3	FEM_PARTY_PROFITABILITY	Profitability
EXPENSE4	FEM_PARTY_PROFITABILITY	Profitability
EXPENSE5	FEM_PARTY_PROFITABILITY	Profitability
ISO_CURRENCY_CD	FEM_PARTY_PROFITABILITY	Profitability
LTD1	FEM_PARTY_PROFITABILITY	Profitability
LTD2	FEM_PARTY_PROFITABILITY	Profitability
LTD3	FEM_PARTY_PROFITABILITY	Profitability
LTD4	FEM_PARTY_PROFITABILITY	Profitability
LTD5	FEM_PARTY_PROFITABILITY	Profitability
PARTNER_VALUE_INDEX	FEM_PARTY_PROFITABILITY	Profitability
PARTY_ID	FEM_PARTY_PROFITABILITY	Profitability
PROFIT	FEM_PARTY_PROFITABILITY	Profitability

Attribute	Source	Data Source Name(s)
PROFIT_PCT	FEM_PARTY_PROFITABILITY	Profitability
PROFIT_TOTAL	FEM_PARTY_PROFITABILITY	Profitability
PROFIT1	FEM_PARTY_PROFITABILITY	Profitability
PROFIT2	FEM_PARTY_PROFITABILITY	Profitability
PROFIT3	FEM_PARTY_PROFITABILITY	Profitability
PROFIT4	FEM_PARTY_PROFITABILITY	Profitability
PROFIT5	FEM_PARTY_PROFITABILITY	Profitability
RATIO1	FEM_PARTY_PROFITABILITY	Profitability
RATIO2	FEM_PARTY_PROFITABILITY	Profitability
RATIO3	FEM_PARTY_PROFITABILITY	Profitability
RATIO4	FEM_PARTY_PROFITABILITY	Profitability
RATIO5	FEM_PARTY_PROFITABILITY	Profitability
RELATIONSHIP_EXPENSE	FEM_PARTY_PROFITABILITY	Profitability
REVENUE_TOTAL	FEM_PARTY_PROFITABILITY	Profitability

Attribute	Source	Data Source Name(s)
REVENUE1	FEM_PARTY_PROFITABILITY	Profitability
REVENUE2	FEM_PARTY_PROFITABILITY	Profitability
REVENUE3	FEM_PARTY_PROFITABILITY	Profitability
REVENUE4	FEM_PARTY_PROFITABILITY	Profitability
REVENUE5	FEM_PARTY_PROFITABILITY	Profitability
TOTAL_EQUITY	FEM_PARTY_PROFITABILITY	Profitability
TOTAL_GROSS_CONTRIB	FEM_PARTY_PROFITABILITY	Profitability
TOTAL_ROE	FEM_PARTY_PROFITABILITY	Profitability
TRANSACTION1	FEM_PARTY_PROFITABILITY	Profitability
TRANSACTION2	FEM_PARTY_PROFITABILITY	Profitability
TRANSACTION3	FEM_PARTY_PROFITABILITY	Profitability
TRANSACTION4	FEM_PARTY_PROFITABILITY	Profitability
TRANSACTION5	FEM_PARTY_PROFITABILITY	Profitability
VALUE1	FEM_PARTY_PROFITABILITY	Profitability

Attribute	Source	Data Source Name(s)
VALUE2	FEM_PARTY_PROFITABILITY	Profitability
VALUE3	FEM_PARTY_PROFITABILITY	Profitability
VALUE4	FEM_PARTY_PROFITABILITY	Profitability
VALUE5	FEM_PARTY_PROFITABILITY	Profitability
YTD1	FEM_PARTY_PROFITABILITY	Profitability
YTD2	FEM_PARTY_PROFITABILITY	Profitability
YTD3	FEM_PARTY_PROFITABILITY	Profitability
YTD4	FEM_PARTY_PROFITABILITY	Profitability
YTD5	FEM_PARTY_PROFITABILITY	Profitability
CUSTOMER_ID	AS_ACCESSES_ALL	Sales Access
GROUP_ID	JTF_RS_GROUPS_VL	Sales Access
GROUP_NAME	JTF_RS_GROUPS_VL	Sales Access
RESOURCE_ID	JTF_RS_RESOURCE_EXTNS	Sales Access
SALESFORCE_ID	AS_ACCESSES_ALL	Sales Access
ORIG_SYSTEM	HZ_ORIG_SYS_REFERENCES	System Reference

Attribute	Source	Data Source Name(s)
ORIG_SYSTEM_REFERENCE	HZ_ORIG_SYS_REFERENCES	System Reference
OWNER_TABLE_ID	HZ_ORIG_SYS_REFERENCES	System Reference
OWNER_TABLE_NAME	HZ_ORIG_SYS_REFERENCES	System Reference
STATUS	HZ_ORIG_SYS_REFERENCES	System Reference

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