# PeopleSoft CRM 9.2: PeopleSoft Event Management

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PeopleSoft CRM 9.2: PeopleSoft Event Management
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# Preface

## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

### Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| ***Typographical Convention*** | ***Description*** |
|---|---|
| **Key+Key** | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( \| ). |
| [ ] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br>Ampersands also precede all PeopleCode variables. |
| ⇒ | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

## PeopleSoft CRM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

## Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

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| 🐦 | Twitter@PeopleSoft_Info. |

| ***Icon*** | ***Link*** |
|---|---|
| ⬭ | PeopleSoft Blogs |
| in | LinkedIn |

## Chapter 1

# Getting Started With Event Management

## PeopleSoft Event Management Overview

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

PeopleSoft Event Management provides the following benefits:

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

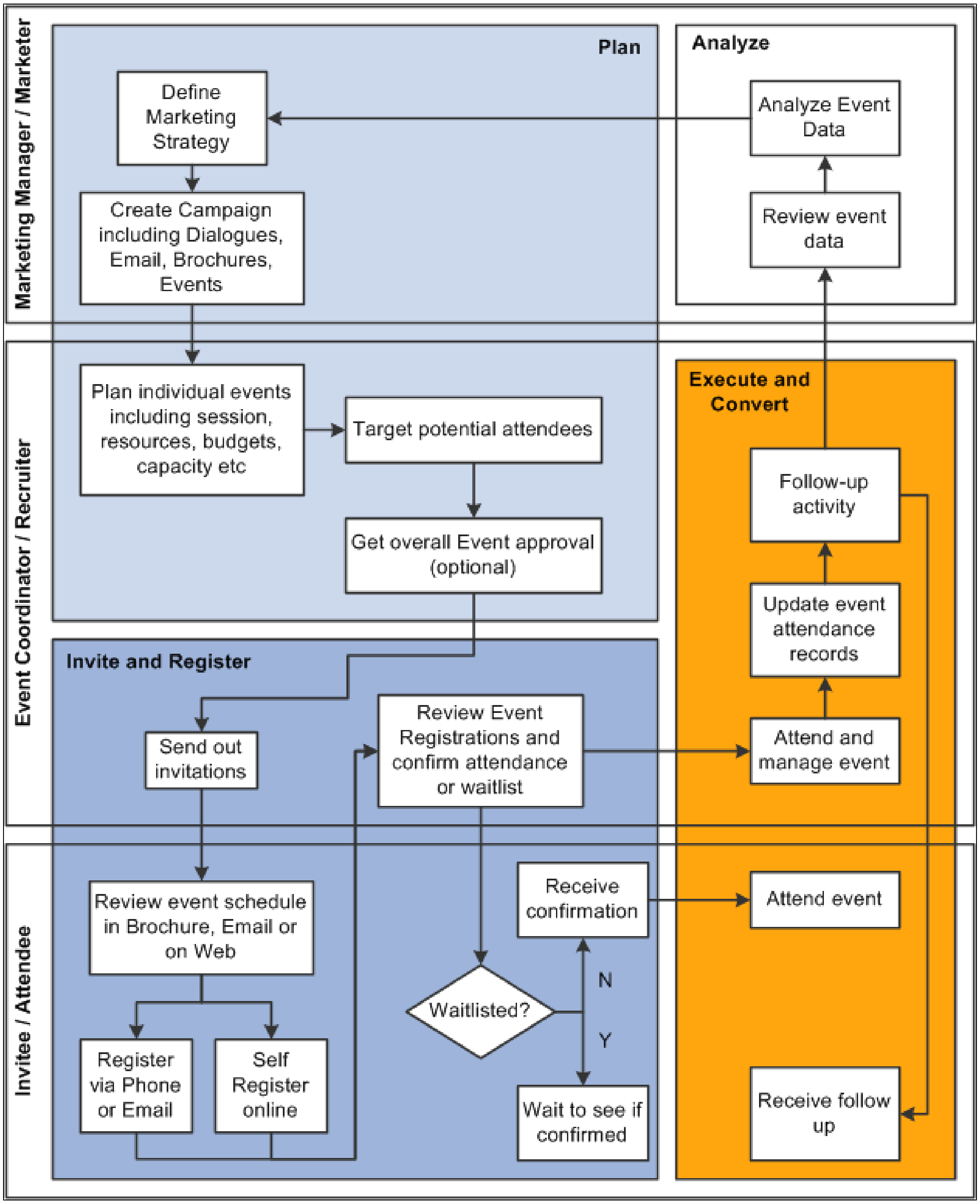
PeopleSoft Event Management provides the tools you need to deliver successful events, from start to finish: Planning, Invitation and Registration, Execution, and Analysis and Follow-Up.

## Event Management Business Process

The event management business process consists of four process steps:

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

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


Marketing Manager / Marketer
Event Coordinator / Recruiter
Invitee / Attendee
Plan
Analyze
Define Marketing Strategy
Analyze Event Data
Create Campaign including Dialogues, Email, Brochures, Events
Review event data
Plan individual events including session, resources, budgets, capacity etc
Target potential attendees
Execute and Convert
Follow-up activity
Get overall Event approval (optional)
Update event attendance records
Invite and Register
Send out invitations
Review Event Registrations and confirm attendance or waitlist
Attend and manage event
Review event schedule in Brochure, Email or on Web
Receive confirmation
Attend event
N
Waitlisted?
Y
Register via Phone or Email
Self Register online
Wait to see if confirmed
Receive follow up

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

## Plan

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

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

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

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

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

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

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

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

## Invite and Register

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

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

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

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

---

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

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### Execute and Convert

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

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

### Analyze

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

## PeopleSoft Event Management Integrations

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

We discuss integration considerations in the implementation topics in this documentation.

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

### PeopleSoft Marketing

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

### PeopleSoft Online Marketing

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

See PeopleSoft Online Marketing.

# PeopleSoft Event Management Implementation

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

See *PeopleTools: Setup Manager*

## Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

## Chapter 2

# Planning Events

## Setting Up the Event

### Pages Used to Set Up Events

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Marketing Programs Page | RA_PROGRAM_ADD | Add a new Marketing Program. |
| Event - Event Page: Detail Section | RAE_EVENT_DETAIL | Define event details. |
| Event - Event Page: Financial Section | RAE_EVENT_DETAIL | Define financial information about the event. |
| Event - Sessions Page | RAE_EVENT_SESSIONS | Define event sessions. |
| Event - Team Page | RAE_EVT_TEAM | Define team members for the event. |
| Event - Resources Page | RAE_EVENT_RESOURC | Define resources for the event. |
| Event - Task Page | RAE_EVENT_TASK | Manage event tasks. |
| Event - Task Details Page | RB_TSK | Define detailed task information for an event task. |
| Event - Costs Page | RAE_EVENT_COSTS | Define costs related to the event. |
| Event - Notes Page | RAE_EVENT_NOTES | Define notes related to the event. |
| Event - Participants Page | RAE_EVENT_REGISTR | Define information about event participants. |

### Understanding Event Setup

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

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

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

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

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

- Event.
- Session.
- Fees.

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

## Marketing Programs Page

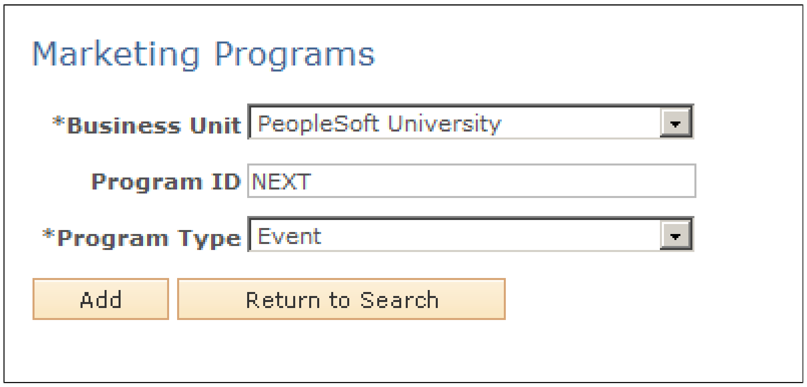
Use the Marketing Programs page (RA_PROGRAM_ADD) to add a new Marketing Program.

Navigation:

Marketing, Marketing Programs

Click the Add Program button.

This example illustrates the fields and controls on the Marketing Programs page.



Marketing Programs

*Business Unit: PeopleSoft University

Program ID: NEXT

*Program Type: Event

| ***Field or Control*** | ***Description*** |
|---|---|
| Business Unit | Select the business unit for which you want to create the event. |
| Program ID | By default, this value is NEXT for a new event. The event will be assigned the next available Program ID when you save. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Program Type | Select *Event* from the list of available choices. |

## Event - Event Page: Detail Section

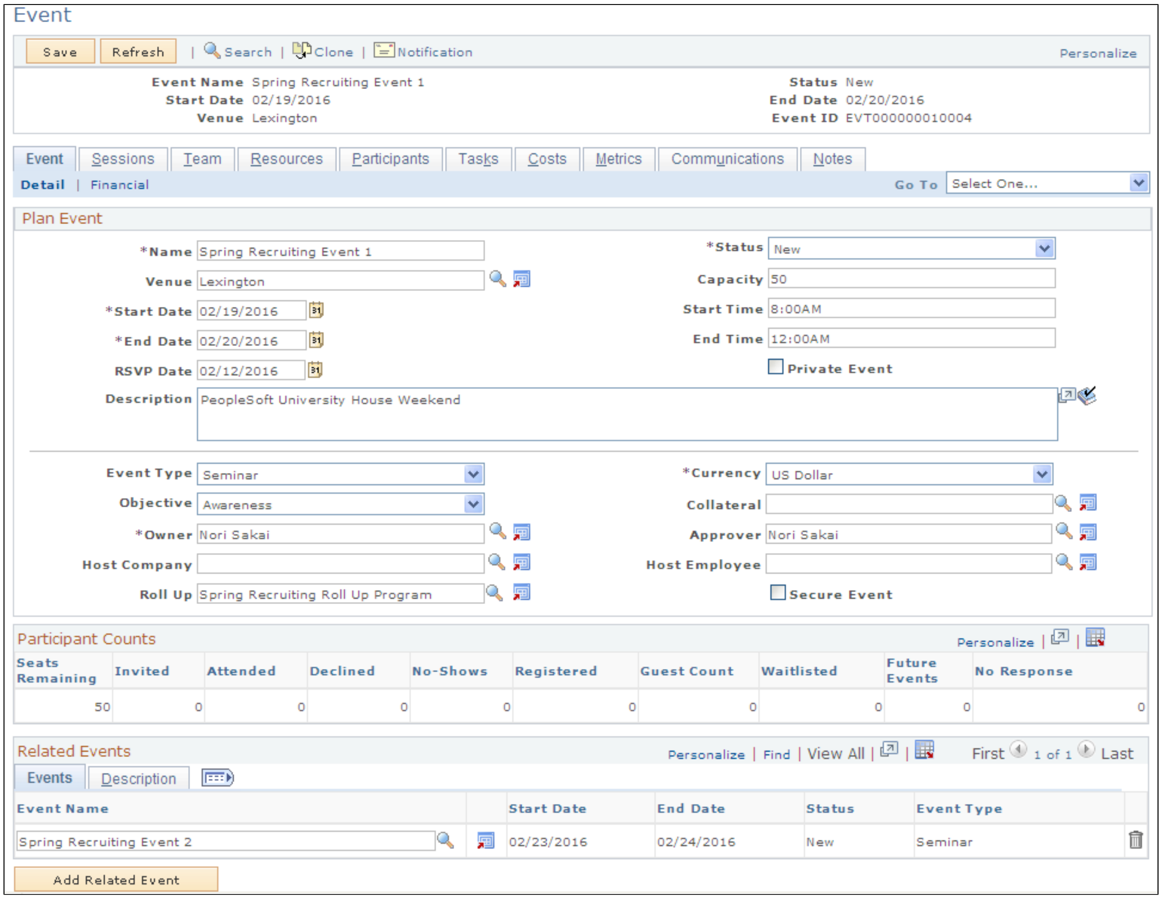
Use the Event Detail page (RAE_EVENT_DETAIL) to define event details.

Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

This example illustrates the fields and controls on the Event - Event page: Detail section.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Detail
Financial
Go To
Select One...
Plan Event
Private Event
Secure Event
Participant Counts
Personalize
Related Events
Personalize | Find | View All
First 1 of 1 Last
Events
Description
Add Related Event

Event Name Spring Recruiting Event 1
Start Date 02/19/2016
Venue Lexington
Status New
End Date 02/20/2016
Event ID EVT000000010004

*Name Spring Recruiting Event 1
Venue Lexington
*Start Date 02/19/2016
*End Date 02/20/2016
RSVP Date 02/12/2016
Description PeopleSoft University House Weekend
*Status New
Capacity 50
Start Time 8:00AM
End Time 12:00AM
☐ Private Event

Event Type Seminar
Objective Awareness
*Owner Nori Sakai
Host Company
Roll Up Spring Recruiting Roll Up Program
*Currency US Dollar
Collateral
Approver Nori Sakai
Host Employee
☐ Secure Event

| Seats Remaining | Invited | Attended | Declined | No-Shows | Registered | Guest Count | Waitlisted | Future Events | No Response |
|---|---|---|---|---|---|---|---|---|---|
| 50 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

| Event Name | Start Date | End Date | Status | Event Type |
|---|---|---|---|---|
| Spring Recruiting Event 2 | 02/23/2016 | 02/24/2016 | New | Seminar |

| ***Field or Control*** | ***Description*** |
|---|---|
| Name | Enter a name for the event. Event names must be unique within a business unit. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Status | Select a status from the list of choices. For a new event, the status is *New* by default. Other statuses include:<br>• *In Review*: The event has been submitted for approval.<br>• *Declined*: The event has not been approved.<br>• *Approved*: The event has been approved and is ready for execution.<br>• *Executing*: The event is currently being executed.<br>• *Completed*: The event is complete. When the event is in this status, all of its main fields are read-only.<br>• *Stop*: The event has been put on hold or canceled (you can use the Notes section to provide details).<br>**Note:** You can define your own Status values using the Status Rules page in PeopleSoft Marketing. Refer to the Marketing documentation for more information. |
| Venue | Click the icon to search and then select a venue from the available list. |
| Capacity | Enter the maximum number of attendees who can attend the event. This value is used to determine whether a person registering for the event will be waitlisted if the number registered exceeds the Capacity.<br>If the event's Capacity increases and there are waitlisted participants, a message displays to inform you that you should review the waitlisted participants. If the Capacity decreases and the number of registrants exceeds the new capacity, a message displays to inform you to review the participant list. |
| Start Date, Start Time | The time and date when the event begins. |
| End Date, End Time | The time and date when the event ends. The End Date cannot be earlier than the Start Date. |
| RSVP Date | The date by which prospective registrants must respond to the invitation. This date cannot be greater than the End Date value, but it can be later than the Start Date. |
| Private Event | Select this check box if the event is private. If the check box is not selected, then the event is public. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Event Type | Select an event type from the list of choices. The available choices are:<br>• Auction<br>• Break<br>• Benefit<br>• Breakfast<br>• Conference Call<br>• Demonstration<br>• Dinner<br>• Drinks<br>• Entertainment<br>• Fundraiser<br>• Keynote<br>• Lecture<br>• Lunch<br>• Meeting<br>• Panel<br>• Presentation<br>• Recreation<br>• Seminar<br>• Tradeshow<br>• Workshop<br>• VIP Event<br>This value is for informational purposes only; the choice does not change what is displayed on the Event Definition pages. |
| Currency | Select the default currency for the event from the list of choices. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Objective | Select an objective for the event (such as Recruiting, Fundraising, and so on). Refer to the Marketing documentation for more detailed information about objectives.<br>**Note:** You can define your own objectives using the Marketing Objectives page in PeopleSoft Marketing. Refer to the Marketing documentation for more information. |
| Collateral | Click the icon and select marketing collateral to associate with the event, if relevant. |
| Owner | Click the icon and select an owner for the event from the available list. The default is the person who created the event. The event owner is leveraged in the event approval workflow process. |
| Approver | Click the icon and select the person who must approve the event. The event approver is leveraged in the event approval workflow process. |
| Host Company | Click the icon and select the name of the company that is hosting the event. |
| Host Employee | Click the icon and select the name of the employee who is hosting the event. The Host Employee does not have to be a member of the Host Company. |
| Roll Up (Campaign) | Select the name of the roll up to which this event is to be associated. |
| Secure Event | Select this check box to restrict access and visibility to the event. When an event is secured, users will be unable to access it unless they are a team member or part of a team role that has been associated with the event. Secure Event uses the same security framework used to secure online dialogs and audiences. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Participant Counts | This section displays information about the participants for the event. It is read-only, and is updated when the main Event Detail page is updated. It includes:<br>• *Seats Remaining*: The event's Capacity minus the number registered. The number registered is the sum of the number of registered participants and their guests.<br>• *Invited*: The total number of people invited to the event.<br>• *Attended*: The total number of people who actually attended the event (including those who were not invited but who showed up anyway).<br>• *Declined*: The total number of invitees who have declined the event.<br>• *No-Shows*: The number of people whose attendance is set to No on the participant list.<br>• *Registered*: The total number of invitees who have accepted the event invitation (that is, registered for the event). This total also includes anyone who has registered but was not invited.<br>• *Guest Count*: The number of guests registered for the event on behalf of the participant. Participants can register anonymous guest participants to attend the event on their behalf.<br>• *Waitlisted*: The number of attendees who have agreed to be waitlisted for the event.<br>• *Future Events*: The number of invitees who have requested to be notified about future events.<br>• *No Response*: The number of invitees who did not respond to the invitation. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Related Events | This section contains references to events that are similar in nature to the current event. This enables the event marketer or support analyst to recommend future events to anyone who cannot attend the current event or who was placed on a waiting list. Related events can also be displayed on the online Event Registration page.<br>• *Event Name*: Click the icon to display a list of related events.<br>• *Start Date*: The start date of the selected event. This value is read-only.<br>• *End Date*: The end date of the selected event. This value is read-only.<br>• *Status*: The status of the selected event. This value is read-only.<br>• *Event Type*: The event type of the selected event. This value is read-only.<br>• *Description*: The description of the selected event. This value is read-only. |
| Target Academic Term | Specify the institution, career, and admit term for the marketing event.<br>This section appears only if the Higher Education field is selected on the General Options page. Specify the admit term if you run the *Recruiting Performance* Fusion Intelligence reports off of the *CSW: Recruiting & Admissions* Interactive Dashboard. |

## Event Workflow

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

| ***Event Status Change*** | ***Action Name*** | ***Role Name*** |
|---|---|---|
| Changed to In Review | Worklist to Approver | Approver |
|  | Email to Approver | Approver |
| Changed to Approved. | Worklist to Event Owner | Owner |
|  | Email to Event Owner | Owner |
| Changed to Declined | Worklist to Event Owner | Owner |

| ***Event Status Change*** | ***Action Name*** | ***Role Name*** |
|---|---|---|
| | Email to Event Owner | Owner |
| Changed to Stopped | Worklist to Event Owner | Owner |
| | Email to Event Owner | Owner |

### Related Links

PeopleSoft Marketing

## Event - Event Page: Financial Section

Use the Event - Event page: Financial section (RAE_EVENT_DETAIL) to define financial information about the event.

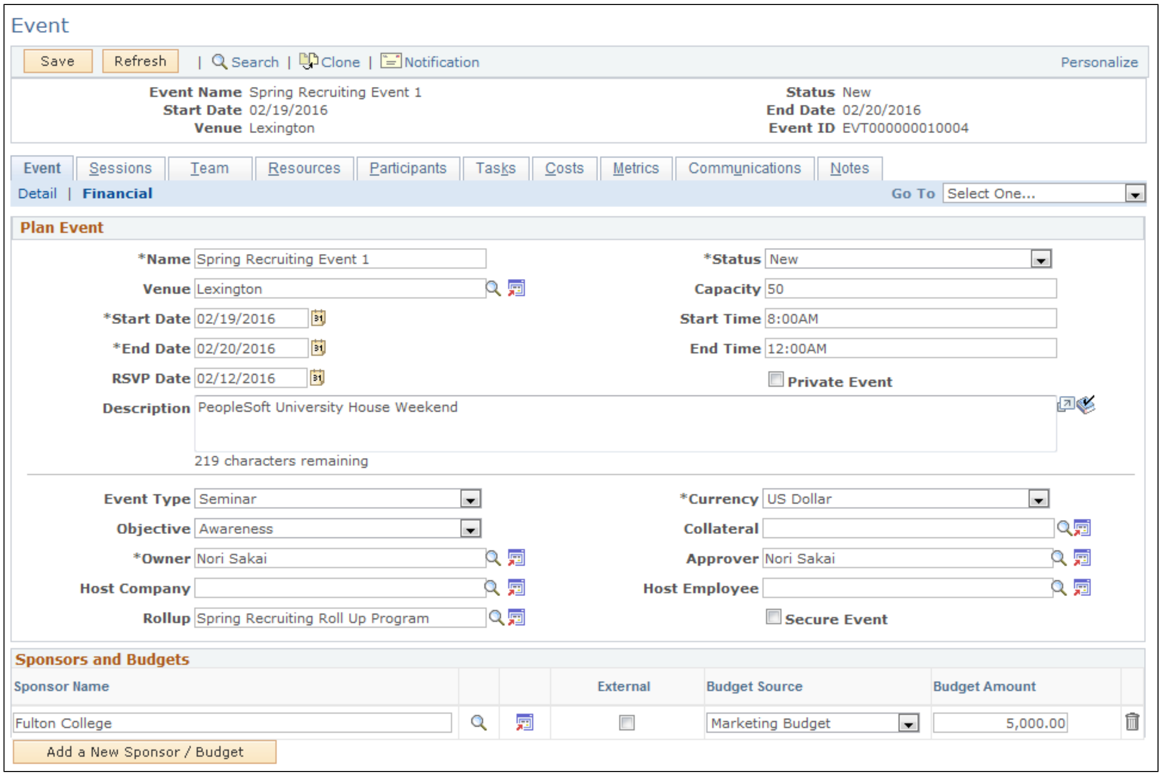
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Financial link on the Event tab.

This is the first of two examples illustrating the fields and controls on the Event - Event page: Financial section.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Detail
Financial
Go To
Select One...
Add a New Sponsor / Budget

**Event Name** Spring Recruiting Event 1
**Start Date** 02/19/2016
**Venue** Lexington
**Status** New
**End Date** 02/20/2016
**Event ID** EVT000000010004

**Plan Event**

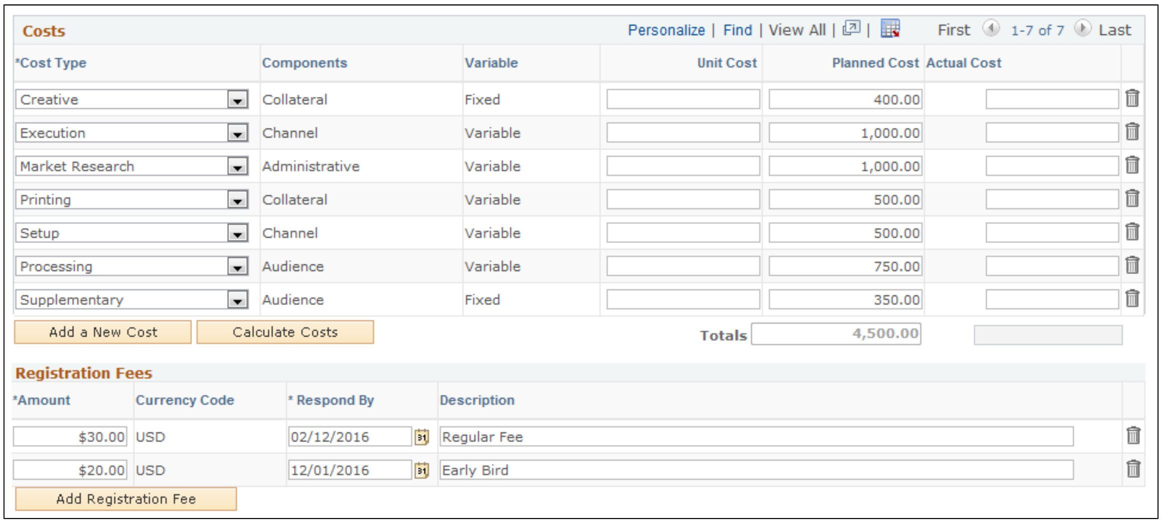
*Name Spring Recruiting Event 1
*Status New
Venue Lexington
Capacity 50
*Start Date 02/19/2016
Start Time 8:00AM
*End Date 02/20/2016
End Time 12:00AM
RSVP Date 02/12/2016
☐ Private Event
Description PeopleSoft University House Weekend
219 characters remaining

Event Type Seminar
*Currency US Dollar
Objective Awareness
Collateral
*Owner Nori Sakai
Approver Nori Sakai
Host Company
Host Employee
Rollup Spring Recruiting Roll Up Program
☐ Secure Event

**Sponsors and Budgets**

| Sponsor Name | External | Budget Source | Budget Amount |
|---|---|---|---|
| Fulton College | ☐ | Marketing Budget | 5,000.00 |

This is the second of two examples illustrating the fields and controls on the Event - Event page: Financial section.


Personalize | Find | View All
First
1-7 of 7
Last
Add a New Cost
Calculate Costs
Add Registration Fee

**Costs**

| *Cost Type | Components | Variable | Unit Cost | Planned Cost | Actual Cost |
|---|---|---|---|---|---|
| Creative | Collateral | Fixed | | 400.00 | |
| Execution | Channel | Variable | | 1,000.00 | |
| Market Research | Administrative | Variable | | 1,000.00 | |
| Printing | Collateral | Variable | | 500.00 | |
| Setup | Channel | Variable | | 500.00 | |
| Processing | Audience | Variable | | 750.00 | |
| Supplementary | Audience | Fixed | | 350.00 | |
| | | | Totals | 4,500.00 | |

**Registration Fees**

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Sponsors and Budgets | This section is a common sub page used by marketing campaigns, marketing roll ups, and the Dialog Designer if the dialog was created using the Marketing Programs page.<br>• *Sponsor Name*: Click the icon and select a sponsor from the list of available choices. Note that the sponsor name is required for all but one record in the list. In other words, you can include one budget record that does not include a sponsor name, but all others must include one.<br>• *External*: Select this check box to allow external viewing, or leave it cleared to specify internal viewing only.<br>• *Budget Source*: Click the icon and select a budget source from the available list.<br>• *Budget Amount*: Enter a budget amount. Note that the amount entered is included with and edited against any budgeted amount specified for an associated roll up. |
| Record Program Costs | This section is a common sub page used by marketing campaigns, marketing roll ups, and the Dialog Designer if the dialog was created using the Marketing Programs page.<br>• *Cost Type*: Select a cost type from the list of choices.<br>• *Component*: This value is based on the Cost Type, and is read-only.<br>• *Variable*: This value is based on the Cost Type, and is read-only.<br>• *Currency*: The currency code that was specified in the**Currency** field in the Detail section.<br>• *Unit Cost*: Enter a unit cost for the budget item.<br>• *Planned Cost*: Enter the anticipated cost of the budget item. This amount cannot be a negative value.<br>• *Actual Cost*: Enter the actual cost of the budget item. This amount cannot be a negative value.<br>• *Totals*: The totals of all the Actual Cost values and the Planned Cost values.<br>• *Calculate*: Click this button to calculate the Totals fields.<br>• *Add a New Cost*: Click this button to add a new cost to the list. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Registration Fees | This section contains an amount and a respond-by date. Typically, an event includes a promotional or Early Bird fee in order to encourage invitees to sign up early for an event. If payment is received on or before the respond-by date, then the special fee takes effect. If the event start is after the last respond-by date, the system uses the most recent fee as the walk in fee.<br>• *Amount*: Enter the amount of the fee. The currency is determined by what was specified in the Currency Code field on the Event Detail page.<br>• *Currency*: This value is read-only and is taken from the Currency Code field on the Event Detail page.<br>• *Respond By*: The final date to which the fee in the Amount field applies.<br>• *Description*: (*Optional*) Enter any explanation you want to include pertaining to the fee. |

## Event - Sessions Page

Use the Event - Sessions page (RAE_EVENT_SESSIONS) to define event sessions.

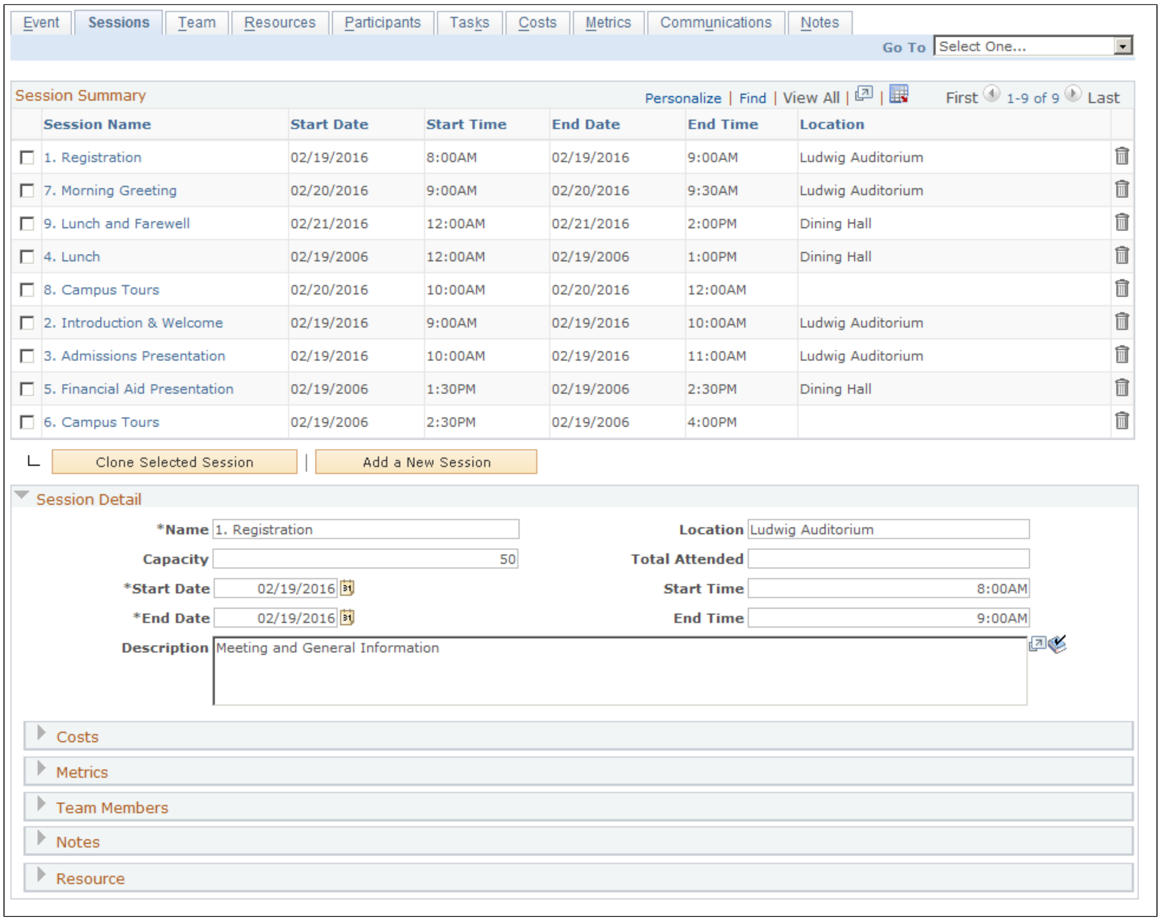
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Sessions tab.

This example illustrates the fields and controls on the Event - Sessions page.


Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Go To
Select One...
Personalize | Find | View All
First
1-9 of 9
Last
Clone Selected Session
Add a New Session
Costs
Metrics
Team Members
Notes
Resource

Session Summary

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

Session Detail

| | | | |
|---|---|---|---|
| *Name | 1. Registration | Location | Ludwig Auditorium |
| Capacity | 50 | Total Attended | |
| *Start Date | 02/19/2016 | Start Time | 8:00AM |
| *End Date | 02/19/2016 | End Time | 9:00AM |
| Description | Meeting and General Information | | |

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

---

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

---

## Session Summary

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Selection Check Box | Select one or more check boxes to include a selected session for cloning. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Clone Selected Session | Click this button to clone the selected sessions. Session information as well as Costs, Metrics, and Team Members will be cloned. |
| Add a New Session | Click this button to add a new empty session. |

## Session Detail

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

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

## Other Sections

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Costs | Use this section to associate costs with a specific session of the event. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Metrics | Use this section to associate metrics (such as session attendance rate or cost per attendee) with a specific session of the event. |
| Team Members | Use this section to associate team members with a specific session of the event. |
| Notes | Use this section to attach a note to a specific session of the event. |
| Resource | Use this section to associate other resources (such as collateral, external participants, or internal participants) with the session. |

## Event - Team Page

Use the Event - Team page (RAE_EVT_TEAM) to define team members for the event.

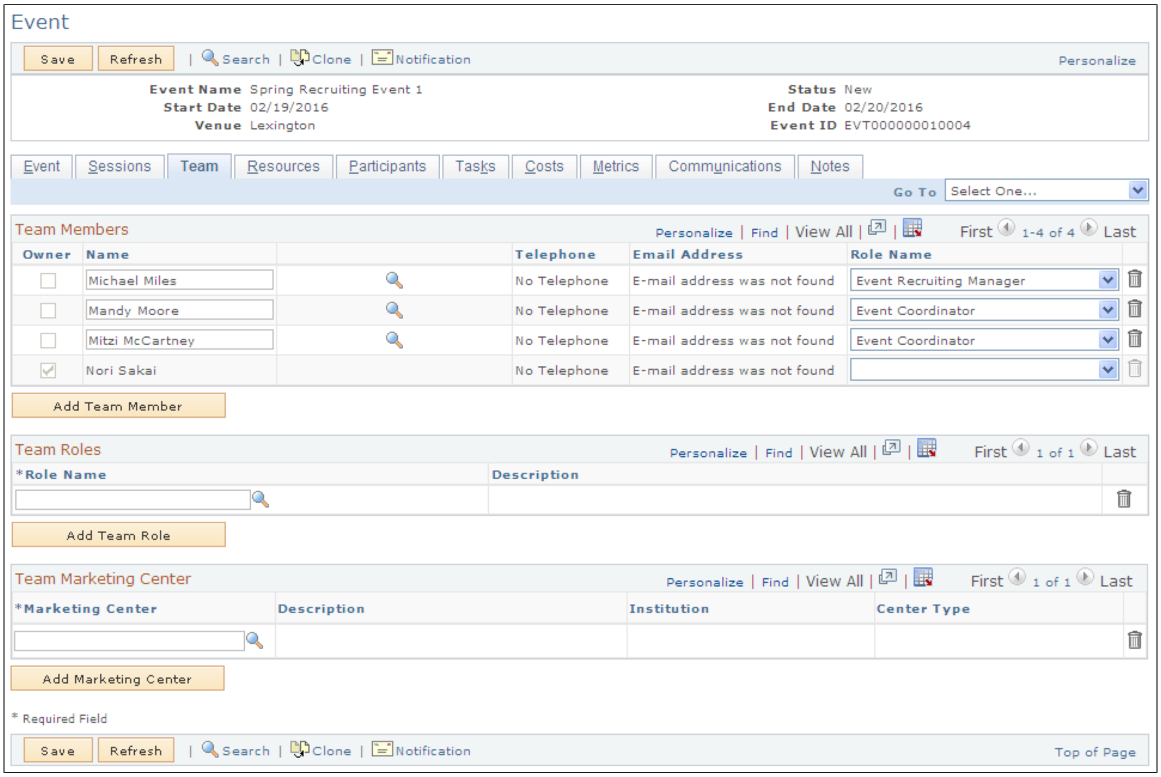
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Team tab.

This example illustrates the fields and controls on the Event - Team page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Go To
Select One...
Personalize | Find | View All
First 1-4 of 4 Last
Add Team Member
First 1 of 1 Last
Add Team Role
Add Marketing Center
Top of Page

**Event Name** Spring Recruiting Event 1
**Start Date** 02/19/2016
**Venue** Lexington
**Status** New
**End Date** 02/20/2016
**Event ID** EVT000000010004

Team Members

| Owner | Name | Telephone | Email Address | Role Name |
|---|---|---|---|---|
| ☐ | Michael Miles | No Telephone | E-mail address was not found | Event Recruiting Manager |
| ☐ | Mandy Moore | No Telephone | E-mail address was not found | Event Coordinator |
| ☐ | Mitzi McCartney | No Telephone | E-mail address was not found | Event Coordinator |
| ☑ | Nori Sakai | No Telephone | E-mail address was not found | |

Team Roles

| *Role Name | Description |
|---|---|
| | |

Team Marketing Center

| *Marketing Center | Description | Institution | Center Type |
|---|---|---|---|
| | | | |

* Required Field

| ***Field or Control*** | ***Description*** |
|---|---|
| Team Members section | This section shows the team members associated with the event. The Owner check box is selected for the event owner. You can add more team members by clicking the **Add Team Member** button.<br>If you add a team member on this page, that person will be immediately available for selection on the Sessions page. Likewise, if you delete a team member who was already associated with a session, that team member is automatically deleted from any sessions with which he or she was associated.<br>You can secure an event so that only team members and team roles that you have specified on this page can view or access the event. |
| Team Roles section | This section shows the roles associated with the event. You can select a role from the available list, and add another role by clicking the **Add Team Role** button. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Team Marketing Center section | The Team Marketing Center grid allows you to specify which events team members can access. Users can only select authorized Marketing Centers from the Marketing Center prompt.<br>The Marketing Program component search excludes any secured events that the user is not authorized to access. If the user has at least one of the allowed roles, or is a team member or is authorized to at least one of the Marketing Centers, then that user can access the secured event.<br>The Event Transfer icon on the Related Events section of the Event Detail page is secured. If user is not authorized to view the event, an error message is displayed. |

## Event - Resources Page

Use the Event - Resources page (RAE_EVENT_RESOURC) to define resources for the event.

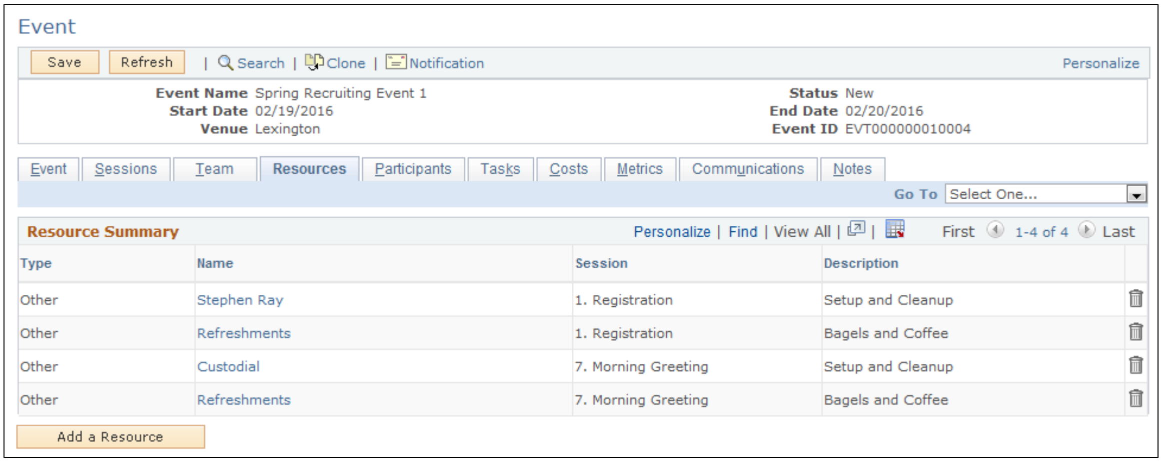
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Resources tab.

This example illustrates the fields and controls on the Event - Resources page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Go To
Select One...
Personalize | Find | View All
First
1-4 of 4
Last
Add a Resource

Event Name Spring Recruiting Event 1
Start Date 02/19/2016
Venue Lexington
Status New
End Date 02/20/2016
Event ID EVT000000010004

Resource Summary

| Type | Name | Session | Description |
|---|---|---|---|
| Other | Stephen Ray | 1. Registration | Setup and Cleanup |
| Other | Refreshments | 1. Registration | Bagels and Coffee |
| Other | Custodial | 7. Morning Greeting | Setup and Cleanup |
| Other | Refreshments | 7. Morning Greeting | Bagels and Coffee |

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Resource Summary | The Resource Summary section displays an overview of all the event's resources. Click a resource name to display more detail about the resource. The summary includes the following:<br>• *Type*: The type of resource. The available values are *Collateral* ,*External Participant*, *Internal Participant*, and *Other*.<br>• *Name*: The name of the resource. Click the name to display more detail about it.<br>• *Session*: If the resource is related to a session, then the session name appears here; otherwise, the field is empty.<br>• *Description*: A description of the resource. |
| Add a Resource | Click this button to insert another resource item in the list and display its Resource Detail information. |

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

## Event - Task Details Page

Use the Event - Task Details page (RB_TSK) to define tasks for the event.

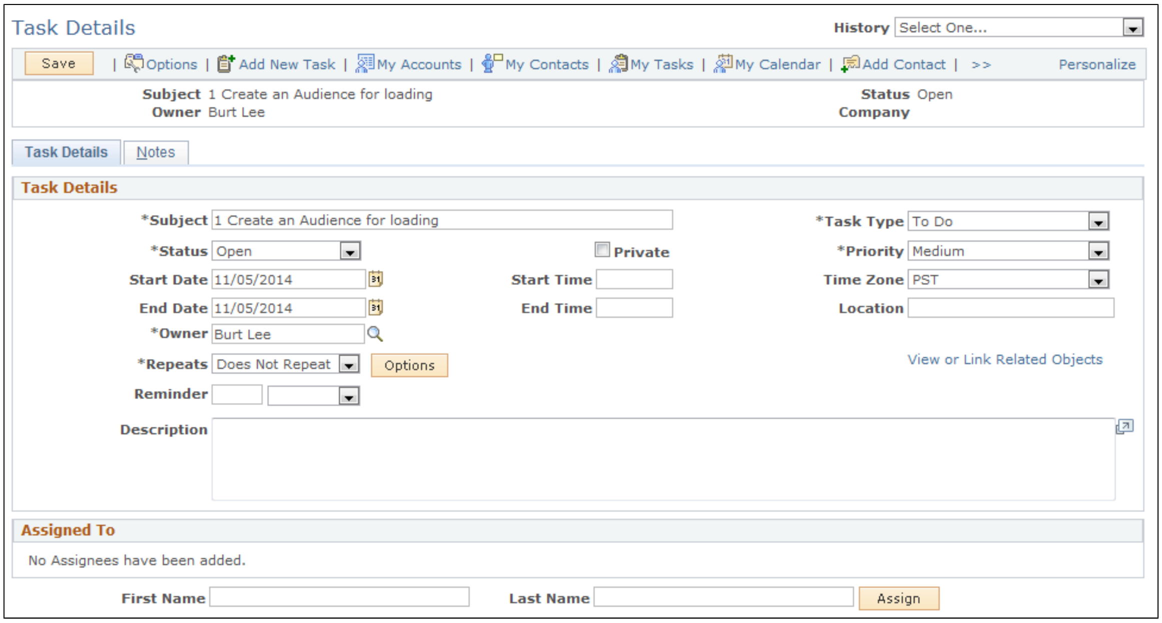
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Tasks tab, then click the name of a task or click the Add Task button.

This example illustrates the fields and controls on the Event - Task Details page.



Task Details

History: Select One...

Subject: 1 Create an Audience for loading

Owner: Burt Lee

Status: Open

Company

Task Details

*Subject: 1 Create an Audience for loading

*Task Type: To Do

*Status: Open

☐ Private

*Priority: Medium

Start Date: 11/05/2014

Start Time

Time Zone: PST

End Date: 11/05/2014

End Time

Location

*Owner: Burt Lee

*Repeats: Does Not Repeat

Reminder

Description

Assigned To

No Assignees have been added.

First Name

Last Name

Save
Options
Add New Task
My Accounts
My Contacts
My Tasks
My Calendar
Add Contact
>>
Personalize
Task Details
Notes
Options
View or Link Related Objects
Assign

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

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

See “Defining Task Tools” (PeopleSoft Marketing), “Marketing Programs - Tasks Page” (PeopleSoft Marketing).

## Event - Costs Page

Use the Event - Costs page (RAE_EVENT_COSTS) to define costs related to the event.

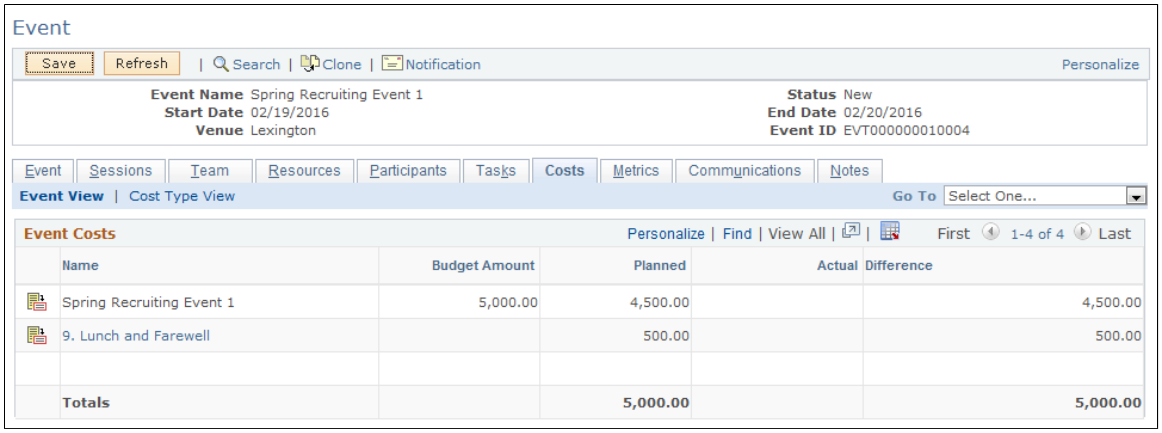
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Costs tab.

This example illustrates the fields and controls on the Event - Costs page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Event View
Cost Type View
Go To
Select One...
Personalize | Find | View All
First
1-4 of 4
Last

**Event Name** Spring Recruiting Event 1
**Start Date** 02/19/2016
**Venue** Lexington
**Status** New
**End Date** 02/20/2016
**Event ID** EVT000000010004

**Event Costs**

| Name | Budget Amount | Planned | Actual | Difference |
|---|---|---|---|---|
| Spring Recruiting Event 1 | 5,000.00 | 4,500.00 | | 4,500.00 |
| 9. Lunch and Farewell | | 500.00 | | 500.00 |
| | | | | |
| **Totals** | | **5,000.00** | | **5,000.00** |

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Event View tab | This tab displays information about the event costs:<br>• *Name*: The event or session name. Event names are not linked; session names are linked to their associated event and clicking them will display that event's information.<br>• *Budget Amount*: The budget amount from the event. This value is not used in calculations.<br>• *Planned*: The planned amount (totals) as entered as event or session costs, totaled by event or session.<br>• *Actual*: The actual amount (totals) as entered as event or session costs, totaled by event or session.<br>• *Difference*: The Planned value minus the Actual value. |
| Cost by Cost Types tab | This tab displays information about event cost types:<br>• *Description*: A description of the cost, entered during Cost Setup.<br>• *Cost Type*: The type of cost, entered during Cost Setup.<br>• *Planned*: The planned amount (totals) as entered as event or session costs, summarized by cost type.<br>• *Actual*: The actual amount (totals) as entered as event or session costs, summarized by cost type.<br>• *Difference*: The Planned value minus the Actual value. |

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

See "Defining Cost Elements" (PeopleSoft Marketing).

## Event - Notes Page

Use the Event - Notes page (RAE_EVENT_NOTES) to define notes related to the event.

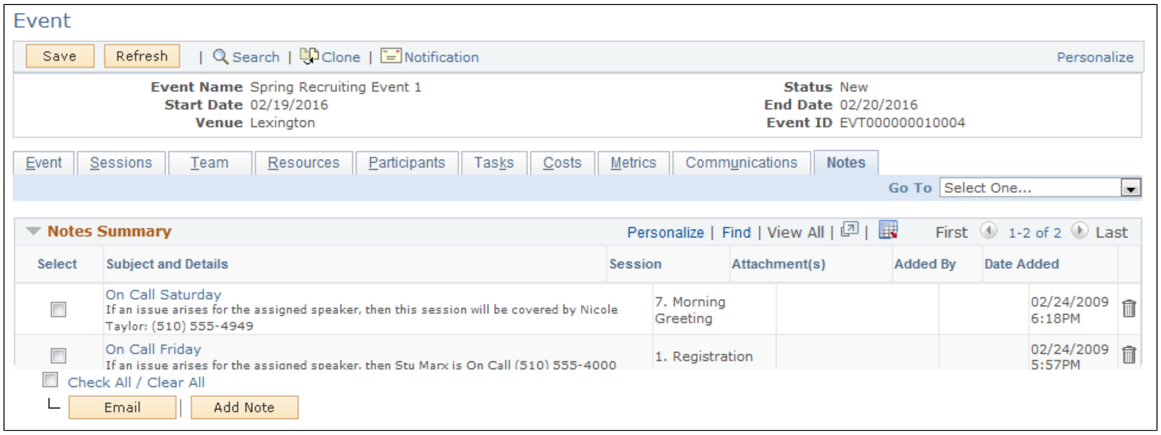
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Notes tab.

This example illustrates the fields and controls on the Event - Notes page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Notes Summary
Personalize | Find | View All |
First
1-2 of 2
Last
Check All / Clear All
Email
Add Note

**Event Name** Spring Recruiting Event 1
**Start Date** 02/19/2016
**Venue** Lexington
**Status** New
**End Date** 02/20/2016
**Event ID** EVT000000010004
**Go To** Select One...

| Select | Subject and Details | Session | Attachment(s) | Added By | Date Added |
|---|---|---|---|---|---|
| ☐ | On Call Saturday<br>If an issue arises for the assigned speaker, then this session will be covered by Nicole Taylor: (510) 555-4949 | 7. Morning Greeting | | | 02/24/2009 6:18PM |
| ☐ | On Call Friday<br>If an issue arises for the assigned speaker, then Stu Marx is On Call (510) 555-4000 | 1. Registration | | | 02/24/2009 5:57PM |

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Selection Check Box | Select the check box to select a note for emailing.<br>See "Sending Manual Notifications From CRM Transactions" (Automation and Configuration Tools). |
| Subject and Details | Click the Subject link to view the note detail. |
| Session Name | The event session to which the note is related. If the note is for an event, this field is empty. |
| Attachments | If there are any attachments associated with the note, a paperclip icon appears in this field. |
| Row Added By, Row Added Date | The name of the person who added the note and the date on which it was added. |
| Note Type | Select *Event* or *Session* from the list of choices. |

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

## Event - Participants Page

Use the Event - Participants page (RAE_EVENT_REGISTR) to define information about event participants.

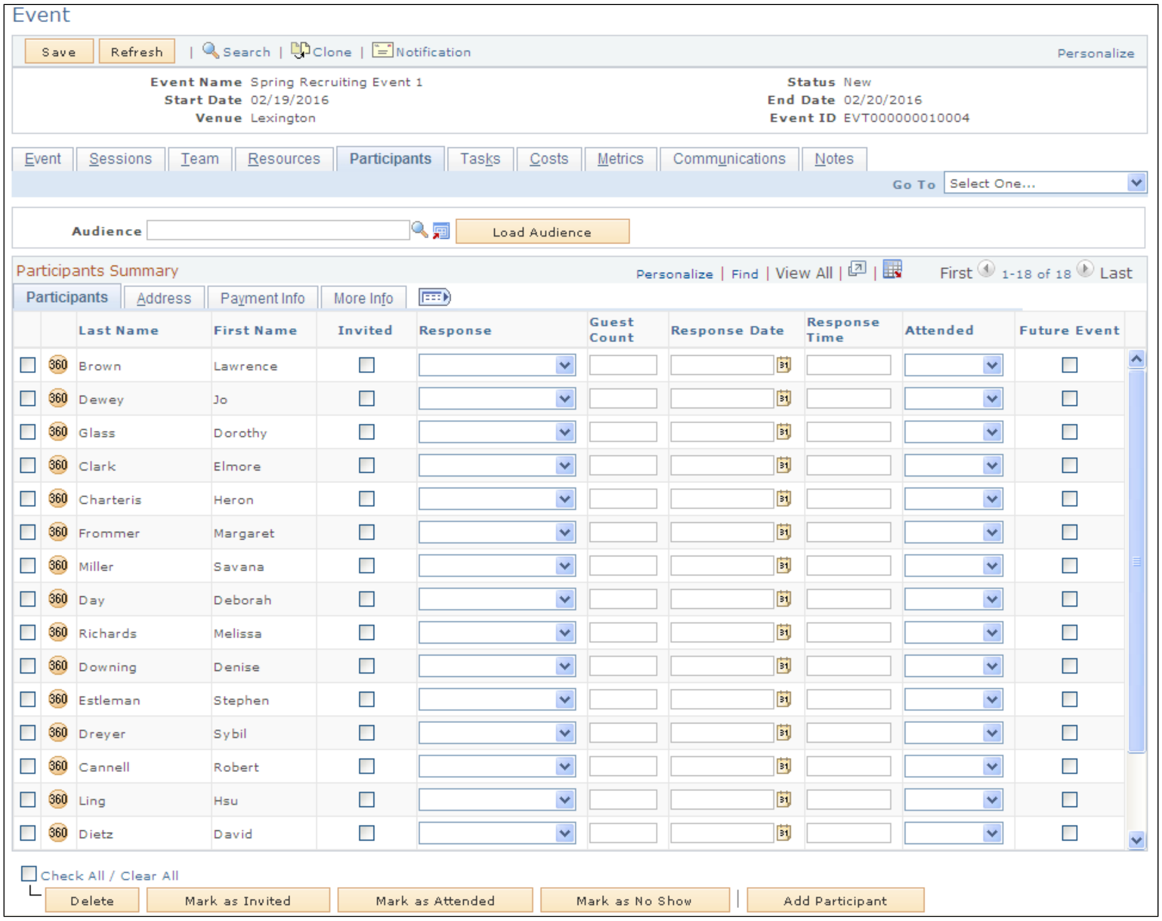
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Participants tab.

This example illustrates the fields and controls on the Event - Participants page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Go To
Select One...
Load Audience
Participants Summary
Personalize | Find | View All
First 1-18 of 18 Last
Participants
Address
Payment Info
More Info
Check All / Clear All
Delete
Mark as Invited
Mark as Attended
Mark as No Show
Add Participant

Event Name Spring Recruiting Event 1
Start Date 02/19/2016
Venue Lexington
Status New
End Date 02/20/2016
Event ID EVT000000010004

Audience

| | | Last Name | First Name | Invited | Response | Guest Count | Response Date | Response Time | Attended | Future Event |
|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 360 | Brown | Lawrence | ☐ | | | | | | ☐ |
| ☐ | 360 | Dewey | Jo | ☐ | | | | | | ☐ |
| ☐ | 360 | Glass | Dorothy | ☐ | | | | | | ☐ |
| ☐ | 360 | Clark | Elmore | ☐ | | | | | | ☐ |
| ☐ | 360 | Charteris | Heron | ☐ | | | | | | ☐ |
| ☐ | 360 | Frommer | Margaret | ☐ | | | | | | ☐ |
| ☐ | 360 | Miller | Savana | ☐ | | | | | | ☐ |
| ☐ | 360 | Day | Deborah | ☐ | | | | | | ☐ |
| ☐ | 360 | Richards | Melissa | ☐ | | | | | | ☐ |
| ☐ | 360 | Downing | Denise | ☐ | | | | | | ☐ |
| ☐ | 360 | Estleman | Stephen | ☐ | | | | | | ☐ |
| ☐ | 360 | Dreyer | Sybil | ☐ | | | | | | ☐ |
| ☐ | 360 | Cannell | Robert | ☐ | | | | | | ☐ |
| ☐ | 360 | Ling | Hsu | ☐ | | | | | | ☐ |
| ☐ | 360 | Dietz | David | ☐ | | | | | | ☐ |

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

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Audience | Select the name of the audience you want to load. |
| Load Audience | Click this button to load one or more seed audiences to create the initial participant list. You can add participants manually or by loading additional audiences, which are added cumulatively to the list. If the audience is dynamic, clicking this button will generate it.<br>**Note:** If you load multiple audiences, the Audience field will display the name of the last audience loaded. Members of all the loaded audiences are displayed in the participant list, but after they have been loaded the list does not display the name of the audience from which they were loaded. In the case of multiple audiences containing the same person, deduplication is performed so that the person's name appears only once in the participant list. |

## Participants Tab

The Participants tab shows detailed information about the invitees.

| ***Field or Control*** | ***Description*** |
|---|---|
| 360 icon | Click this icon to access the 360-degree view for the invitee. The type of 360-degree view displayed depends on which application is installed and enabled. |
| Last Name, First Name | The name of the invitee. |
| Guest Count | The number of guests to attend the event on behalf of the participant. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Add Participant | Click this button to add additional individuals to the participant list.<br>If the person already exists in the participant list with a different role, an error message displays informing you that you cannot add the same person with a different role. If you want to change the participant's role, you can delete the existing participant and add a new one.<br>If the search returns no results, you can quick create the person with the role of Consumer, or Contact for a Company. If the prospective participant has requested not to be contacted, an error message displays and that person is not added to the participant list. |

## Address Tab

This tab contains invitees' email and physical addresses.

## More Info Tab

| ***Field or Control*** | ***Description*** |
|---|---|
| Role | The invitee's role (for example, Consumer, Contact, or Worker). If the same person appears in the attendee list under multiple roles (for example, if the person belongs to more than one audience), then priority is given to the Consumer role followed by Contact for Company, and finally Worker.<br>Do Not Contact requests are not considered when loading audiences, since it is expected that any applications using the lists will be applying Do Not Contact rules. |
| Company | The company with which the invitee is associated. This field is optional. |
| Guest Of | The name of the event participant who registered for this guest attendee, if the guest is registered through an Online Marketing Dialog using the Register Event for Guest function.<br>**Note:** A guest attendee can be the guest of only one participant and not multiple participants. |

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

**Note:** On deleting an invitee from this page, the system displays a warning if there are guests associated with the invitee.

See Sending Invitations.

## Chapter 3

# Inviting and Registering for Events

---

## Sending Invitations

This section describes how to send invitations to an event.

### Pages Used to Send Invitations

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Event - Participants Page | RAE_EVENT_REGISTR | Send invitations to an event. |

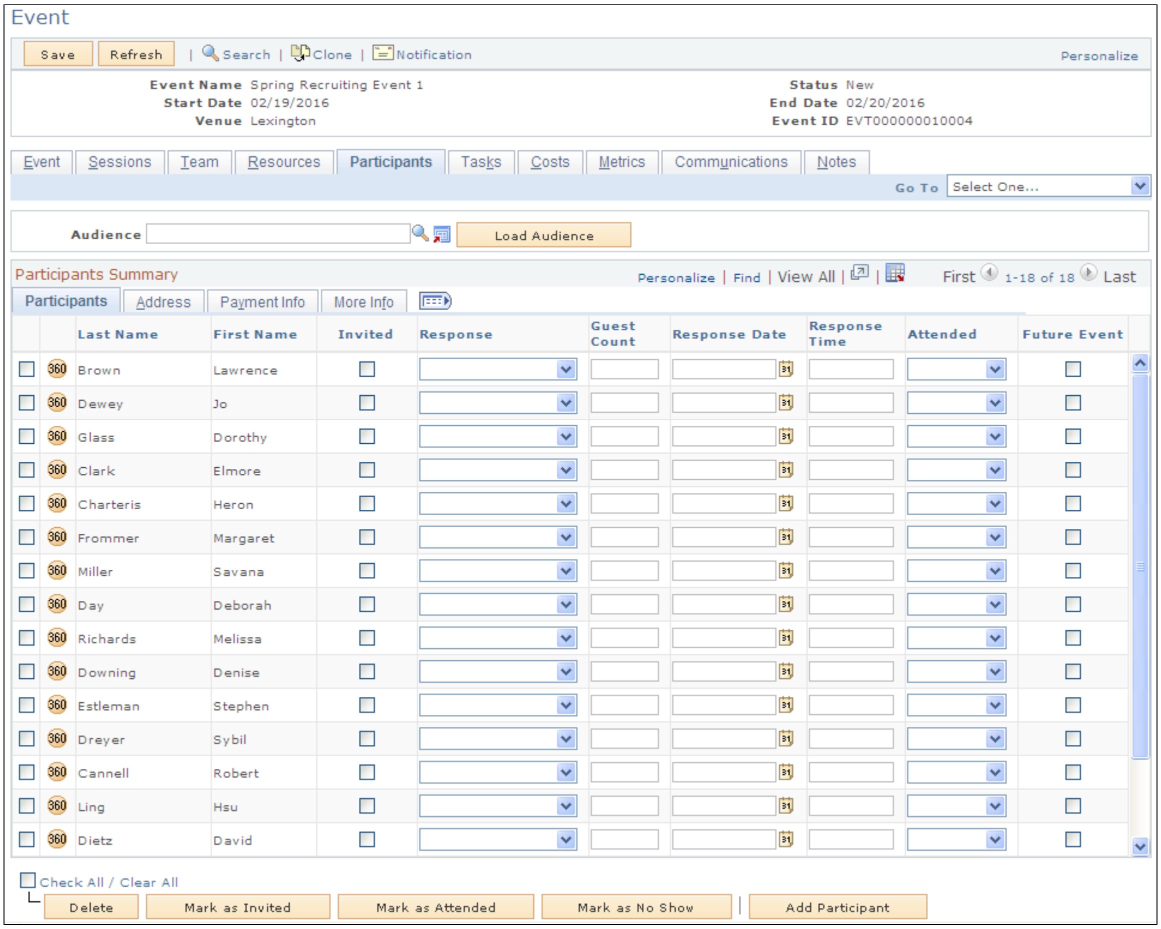
### Event - Participants Page

Use the Event - Participants page (RAE_EVENT_REGISTR) to send invitations to an event.

Navigation:

Click the Participants tab on the Event Detail page.

This example illustrates the fields and controls on the Event - Participants page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Go To
Select One...
Load Audience
Participants Summary
Personalize | Find | View All
First 1-18 of 18 Last
Participants
Address
Payment Info
More Info
Check All / Clear All
Delete
Mark as Invited
Mark as Attended
Mark as No Show
Add Participant

**Event Name** Spring Recruiting Event 1
**Start Date** 02/19/2016
**Venue** Lexington
**Status** New
**End Date** 02/20/2016
**Event ID** EVT000000010004

**Audience**

| | | Last Name | First Name | Invited | Response | Guest Count | Response Date | Response Time | Attended | Future Event |
|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 360 | Brown | Lawrence | ☐ | | | | | | ☐ |
| ☐ | 360 | Dewey | Jo | ☐ | | | | | | ☐ |
| ☐ | 360 | Glass | Dorothy | ☐ | | | | | | ☐ |
| ☐ | 360 | Clark | Elmore | ☐ | | | | | | ☐ |
| ☐ | 360 | Charteris | Heron | ☐ | | | | | | ☐ |
| ☐ | 360 | Frommer | Margaret | ☐ | | | | | | ☐ |
| ☐ | 360 | Miller | Savana | ☐ | | | | | | ☐ |
| ☐ | 360 | Day | Deborah | ☐ | | | | | | ☐ |
| ☐ | 360 | Richards | Melissa | ☐ | | | | | | ☐ |
| ☐ | 360 | Downing | Denise | ☐ | | | | | | ☐ |
| ☐ | 360 | Estleman | Stephen | ☐ | | | | | | ☐ |
| ☐ | 360 | Dreyer | Sybil | ☐ | | | | | | ☐ |
| ☐ | 360 | Cannell | Robert | ☐ | | | | | | ☐ |
| ☐ | 360 | Ling | Hsu | ☐ | | | | | | ☐ |
| ☐ | 360 | Dietz | David | ☐ | | | | | | ☐ |

---

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

---

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

## Participants Tab

The Participants tab shows detailed information about the invitees.

| ***Field or Control*** | ***Description*** |
|---|---|
| 360 icon | Click this icon to access the 360-degree view for the invitee. The type of 360-degree view displayed depends on which application is installed and enabled. |
| Last Name, First Name | The name of the invitee. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Invited | Select this check box to include the specified person in the event invitation. |
| Response | Select the invitee's response to the invitation from the list of choices. The default value is no response; other options include *Registered*, *Waitlisted*, and *Declined*.<br>Invitees are waitlisted if they accept the invitation after all available seats for the event have been filled.<br>If you select *Registered*, the system verifies whether the event has the required number of available seats. If seats are not available, the system displays a warning indicating that the event does not have available seats, but the invitee can be waitlisted for the event. |
| Guest Count | The number of guest participants to attend the event on behalf of the invitee. |
| Response Date, Response Time | The date and time on which the invitee responded to the invitation. |
| Attended | Specifies whether the invitee attended the event. By default this field is blank; select *Yes* or *No*. |
| Future Event | Select this check box if the invitee has indicated interest in receiving information about upcoming future events similar to this one. |
| Mark as Invited | Click this button to mark all selected invitees as Invited to the event. |
| Mark as Attended | Select this check box to mark all selected invitees has having Attended the event. |
| Mark as No Show | Click this button to set the value in the selected invitees' Attended field to No. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Add Participant | Click this button to add additional individuals to the participant list.<br>If the person already exists in the participant list with a different role, an error message displays informing you that you cannot add the same person with a different role. If you want to change the participant's role, you can delete the existing participant and add a new one.<br>If the search returns no results, you can quick create the person with the role of Consumer, or Contact for a Company. If the prospective participant has requested not to be contacted, an error message displays and that person is not added to the participant list. |

### Payment Info Tab

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Amount Paid | The amount that the invitee has paid to attend the event. This amount is captured automatically from the Online Marketing credit card payment. |
| Refund Amount | The amount refunded to the invitee (for example, if attendance was cancelled). The Amount Paid and Refund Amount are used when calculating the revenue generated from the event. |
| Currency Code | The currency type in which the payment was made. The Currency Code displayed is the same as the value specified on the Event Detail page. |
| 360 icon | Click this icon to access the 360-degree view for the invitee. The type of 360-degree view displayed depends on which application is installed and enabled. |

See Sending Invitations.

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## Registering Online for Events

This section describes:

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

---

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

---

## Setting Up Online Marketing to Access Marketing Events

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

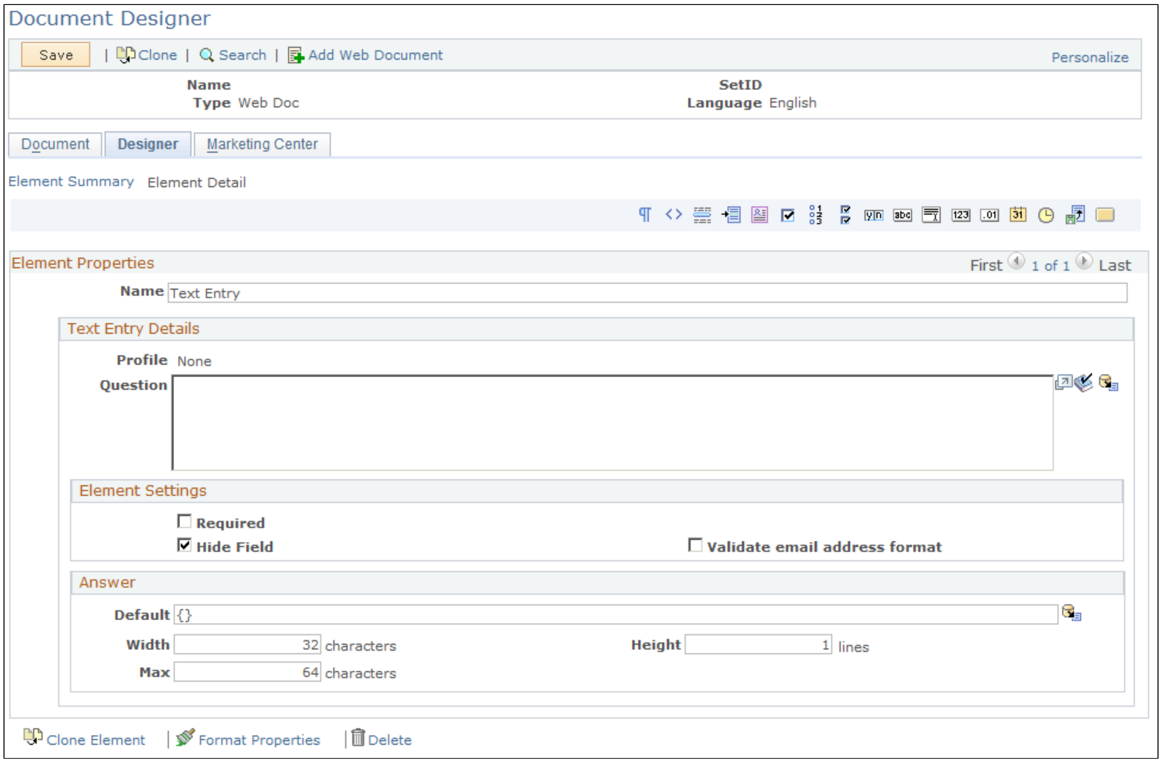
To allow you to access event information from an Online Marketing dialog, Online Marketing includes a custom content extension named Access Marketing Event. The extension itself is described in the Online Marketing documentation, as is the general process for including extensions in documents; this section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

See "Understanding Extensions" (PeopleSoft Online Marketing) and "Creating and Using Extensions" (PeopleSoft Online Marketing).

### Creating the Document Field

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

This example illustrates the fields and controls on the Document Designer page with Text Entry field.


Document Designer
Save
Clone
Search
Add Web Document
Personalize
Document
Designer
Marketing Center
Element Summary
Element Detail
Element Properties
First
1 of 1
Last
Text Entry Details
Element Settings
Answer
Clone Element
Format Properties
Delete

Name
Type Web Doc
SetID
Language English

Name Text Entry

Profile None

Question

☐ Required

☑ Hide Field

☐ Validate email address format

Default {}

Width 32 characters

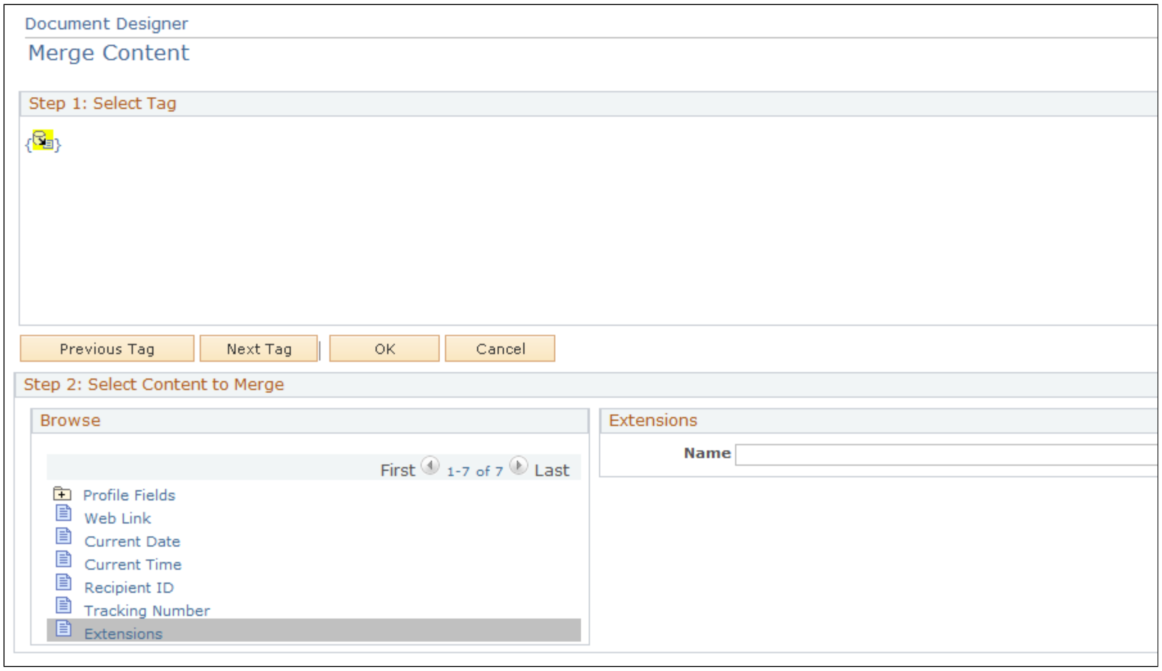
Height 1 lines

Max 64 characters

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

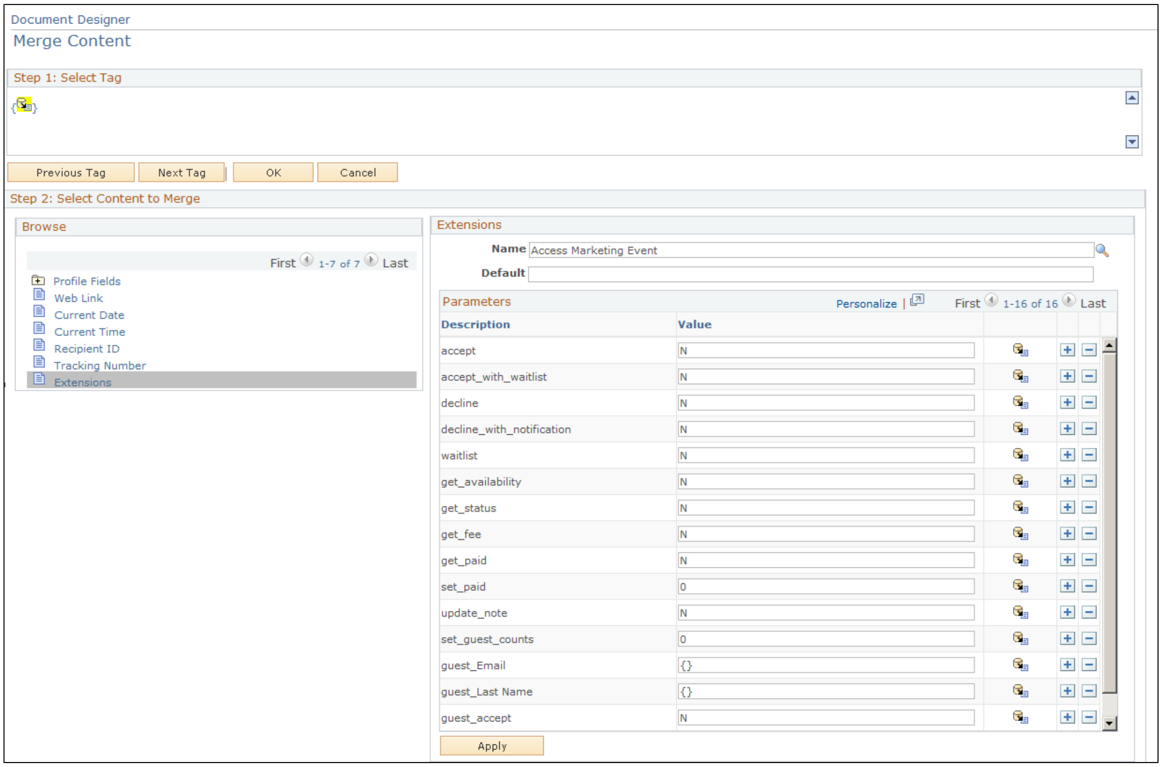
Next, click the Merge icon next to the Default field to display the Merge Content page, and select Extensions from the list.

This example illustrates the fields and controls on the Merge Content page.


Document Designer
Merge Content
Step 1: Select Tag
Previous Tag
Next Tag
OK
Cancel
Step 2: Select Content to Merge
Browse
First 1-7 of 7 Last
Profile Fields
Web Link
Current Date
Current Time
Recipient ID
Tracking Number
Extensions
Extensions
Name

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

This example illustrates the Merge Content page with parameters displayed.


Document Designer
Merge Content
Step 1: Select Tag
Previous Tag
Next Tag
OK
Cancel
Step 2: Select Content to Merge
Browse
First 1-7 of 7 Last
Profile Fields
Web Link
Current Date
Current Time
Recipient ID
Tracking Number
Extensions
Extensions
Parameters
Personalize
First 1-16 of 16 Last
Apply

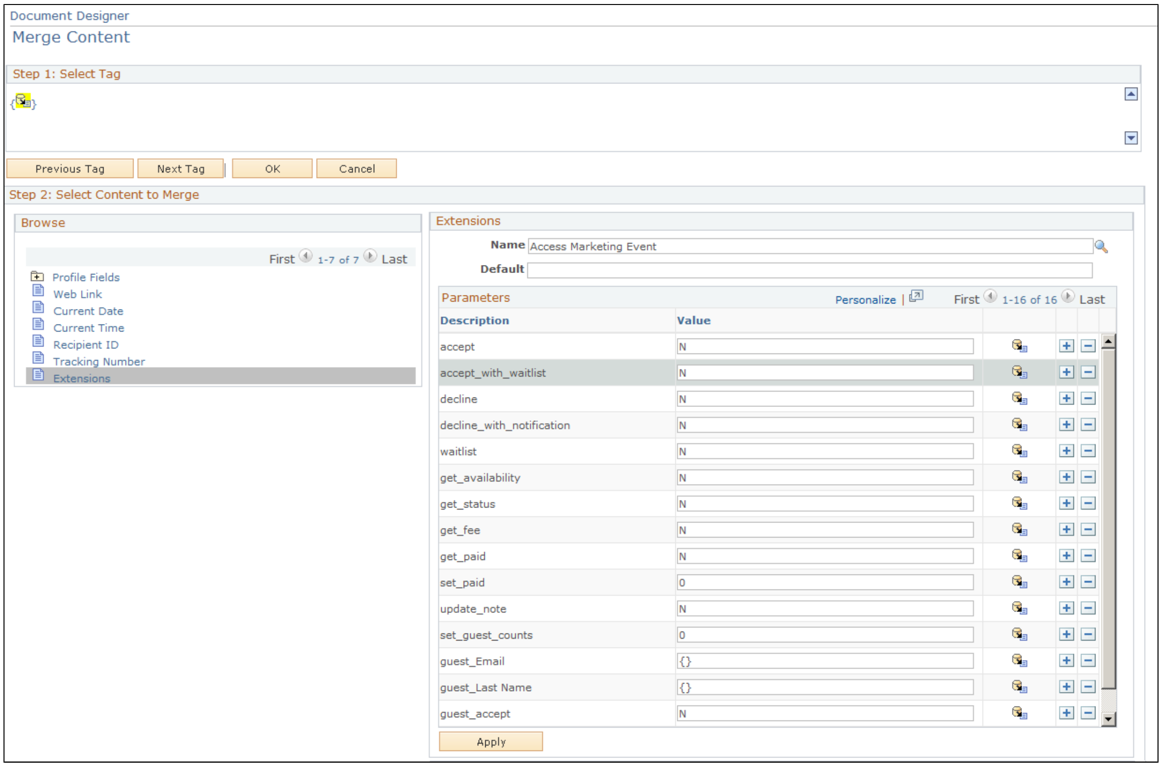
**Name** Access Marketing Event

**Default**

| Description | Value |
|---|---|
| accept | N |
| accept_with_waitlist | N |
| decline | N |
| decline_with_notification | N |
| waitlist | N |
| get_availability | N |
| get_status | N |
| get_fee | N |
| get_paid | N |
| set_paid | 0 |
| update_note | N |
| set_guest_counts | 0 |
| guest_Email | {} |
| guest_Last Name | {} |
| guest_accept | N |

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

This example illustrates the Merge Content page with parameter chosen.


Document Designer
Merge Content
Step 1: Select Tag
Previous Tag
Next Tag
OK
Cancel
Step 2: Select Content to Merge
Browse
First 1-7 of 7 Last
Profile Fields
Web Link
Current Date
Current Time
Recipient ID
Tracking Number
Extensions
Extensions
Parameters
Personalize
First 1-16 of 16 Last
Apply

Name: Access Marketing Event

Default:

| Description | Value |
|---|---|
| accept | N |
| accept_with_waitlist | N |
| decline | N |
| decline_with_notification | N |
| waitlist | N |
| get_availability | N |
| get_status | N |
| get_fee | N |
| get_paid | N |
| set_paid | 0 |
| update_note | N |
| set_guest_counts | 0 |
| guest_Email | {} |
| guest_Last Name | {} |
| guest_accept | N |

Click the **OK** or**Apply** button to save your settings.

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

See “System Delivered Extensions” (PeopleSoft Online Marketing).

## Using Access Marketing Event with Dynamic Content

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

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

See “Adding Dynamic Content to an Email Document” (PeopleSoft Online Marketing).

## Using Access Marketing Event with the Dialog Flow

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

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

## Setting Up an Online Marketing Document to Accept Credit Card Payments

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

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

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

See “System Delivered Extensions” (PeopleSoft Online Marketing).

See “Creating and Using Extensions” (PeopleSoft Online Marketing).

### Overview of Creating an Online Marketing Dialog to Accept Credit Cards

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

1. Create document fields or profile fields containing the values you want to include on your credit card page (first and last name, billing address, credit card number, expiration date, and so forth). These fields should correspond to the parameters on the Credit Card Service extension.
2. Create a document that includes fields requesting all of the information you want to gather (these fields should correspond to the profile or document fields you already created). Include a Submit button on the document.
3. Create a second document. It should contain the following:
    - Some sort of text, graphic, or other indication that the system is processing the credit card (for example, Please wait while we process your credit card.)
    - A hidden document field that includes merge content to call the Credit Card Service extension (refer to the section on creating the document field). For each parameter in the extension, include the appropriate profile or document field that you have previously created.
    - A hidden document field to accept the results of the Credit Card Service extension. The extension returns an authorization code if the credit card is accepted, *0* if it is declined, or *1* if a system error occurs.
    - A Submit button with the **Invisible Auto-submit Button** option selected. A button with this option selected does not appear on the page, but is automatically clicked when the page is displayed.

The typical document flow might include the following:

- An External Event Trigger.
- A Landing Page (the page where the user enters the credit card data and submits it).
- An Intermediate Page (the credit card submit page that contains the text, the hidden fields, and the hidden auto-submit button).
- A Decision Point: If the value returned is greater than 0 (indicating success), go to a Final Page informing the user that the transaction was successful. Otherwise, you can choose to either send the user back to the data collection page, or display another Final Page indicating that the transaction failed.

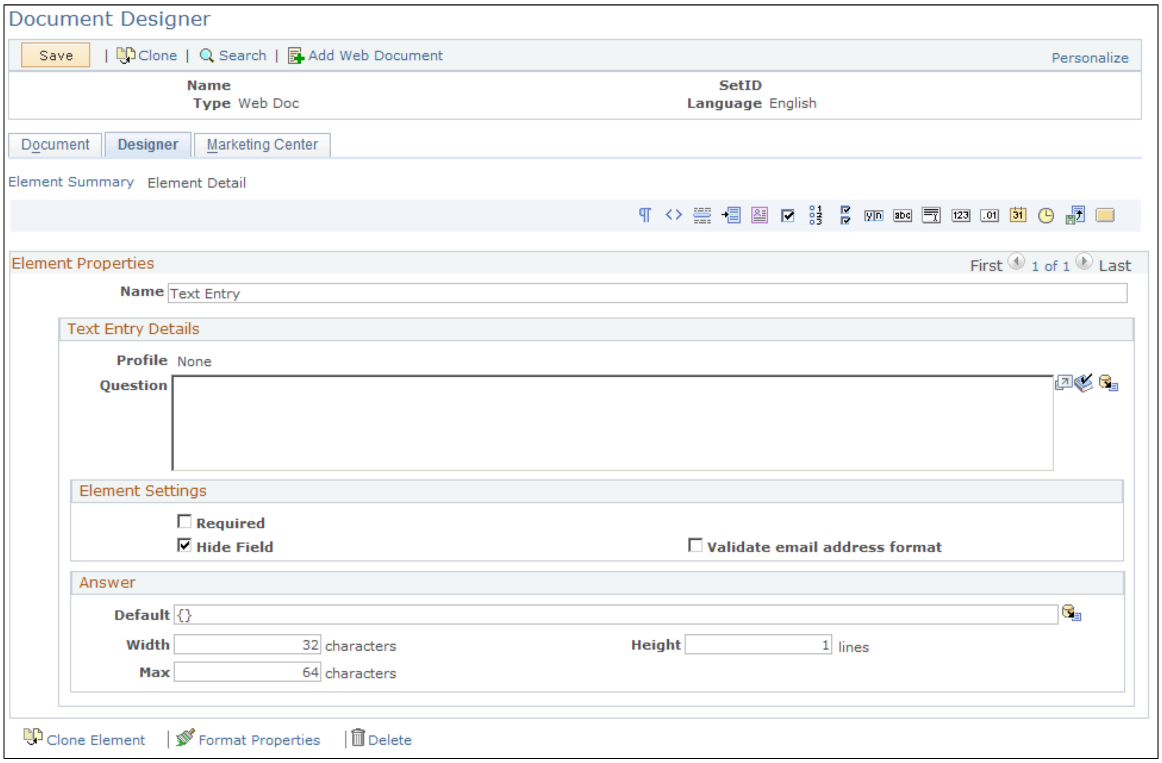
See “System Delivered Extensions” (PeopleSoft Online Marketing).

See  PeopleSoft Online Marketing.

## Creating the Document Field

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

This example illustrates the Document Designer page with Text Entry field.


Document Designer
Save
Clone
Search
Add Web Document
Personalize
Document
Designer
Marketing Center
Element Summary
Element Detail
Element Properties
First
1 of 1
Last
Text Entry Details
Element Settings
Answer
Clone Element
Format Properties
Delete

**Name**
**Type** Web Doc
**SetID**
**Language** English

**Name** Text Entry

**Profile** None
**Question**

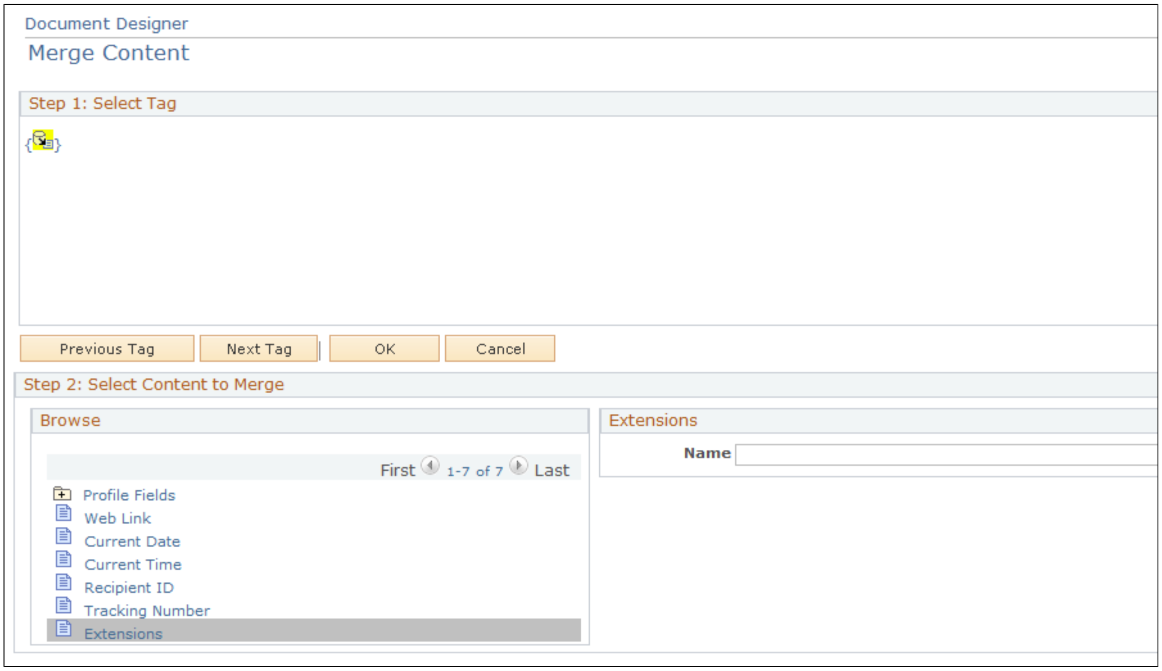
☐ **Required**
☑ **Hide Field**
☐ **Validate email address format**

**Default** {}
**Width** 32 characters
**Height** 1 lines
**Max** 64 characters

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

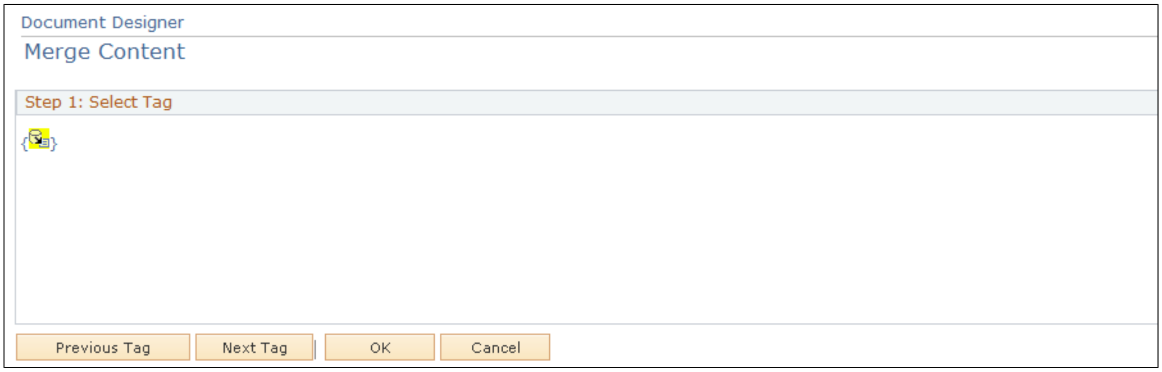
Next, click the Merge icon next to the Default field to display the Merge Content page, and select Extensions from the list.

This example illustrates the fields and controls on the Merge Content page.

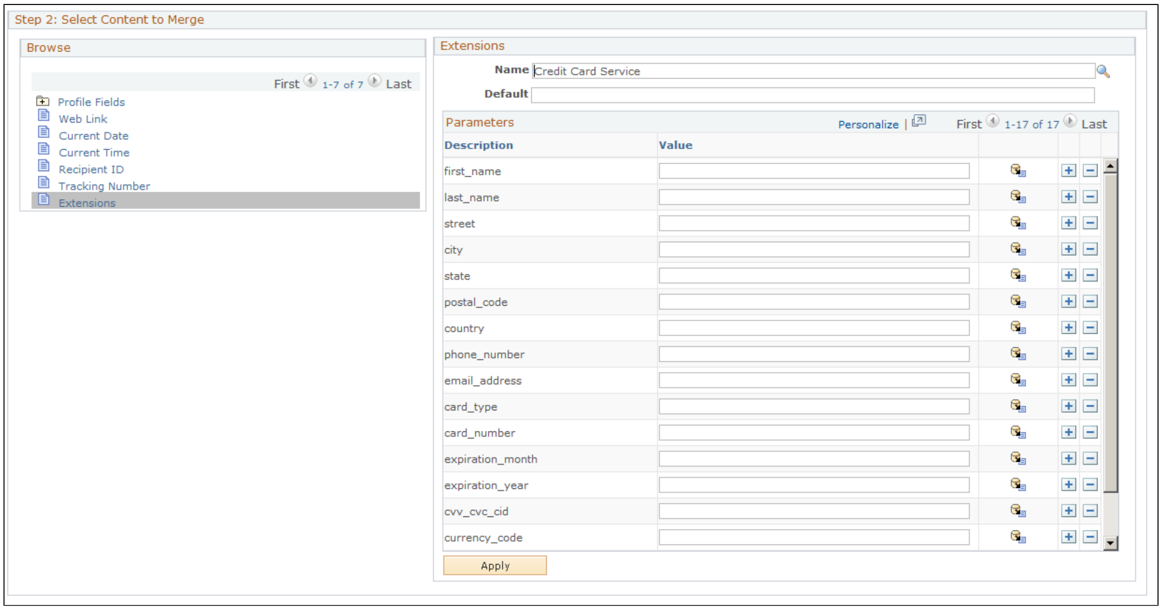

Document Designer
Merge Content
Step 1: Select Tag
Previous Tag
Next Tag
OK
Cancel
Step 2: Select Content to Merge
Browse
First 1-7 of 7 Last
Profile Fields
Web Link
Current Date
Current Time
Recipient ID
Tracking Number
Extensions
Extensions
Name

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

This is the first of two examples illustrating the Merge Content page with parameters displayed.


Document Designer
Merge Content
Step 1: Select Tag
Previous Tag
Next Tag
OK
Cancel

This is the second of two examples illustrating the Merge Content page with parameters displayed.



Step 2: Select Content to Merge

Browse

First 1-7 of 7 Last

- Profile Fields
- Web Link
- Current Date
- Current Time
- Recipient ID
- Tracking Number
- Extensions

Extensions

**Name** Credit Card Service

**Default**

Parameters

| Description | Value |
|---|---|
| first_name | |
| last_name | |
| street | |
| city | |
| state | |
| postal_code | |
| country | |
| phone_number | |
| email_address | |
| card_type | |
| card_number | |
| expiration_month | |
| expiration_year | |
| cvv_cvc_cid | |
| currency_code | |

Click the **OK** or**Apply** button to save your settings.

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

See “System Delivered Extensions” (PeopleSoft Online Marketing).

---

# Sending Event Reminders

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

The process for sending reminders is discussed in the topics on executing and converting events, and in the Online Marketing documentation in the topics on designing flows for online dialogs and on designing email documents.

## Related Links

“Understanding Flows” (PeopleSoft Online Marketing)

“Understanding Email Documents” (PeopleSoft Online Marketing)

## Chapter 4

# Executing and Converting Events

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## Setting Up Event Communications

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

### Pages Used to Set Up Event Communications

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Event - Communications Page | RAE_EVENT_ACTIONS | Set up email and print communications for an event. |

### Event - Communications Page

Use the Event - Communications page (RAE_EVENT_ACTIONS) to set up email and print communications for an event.

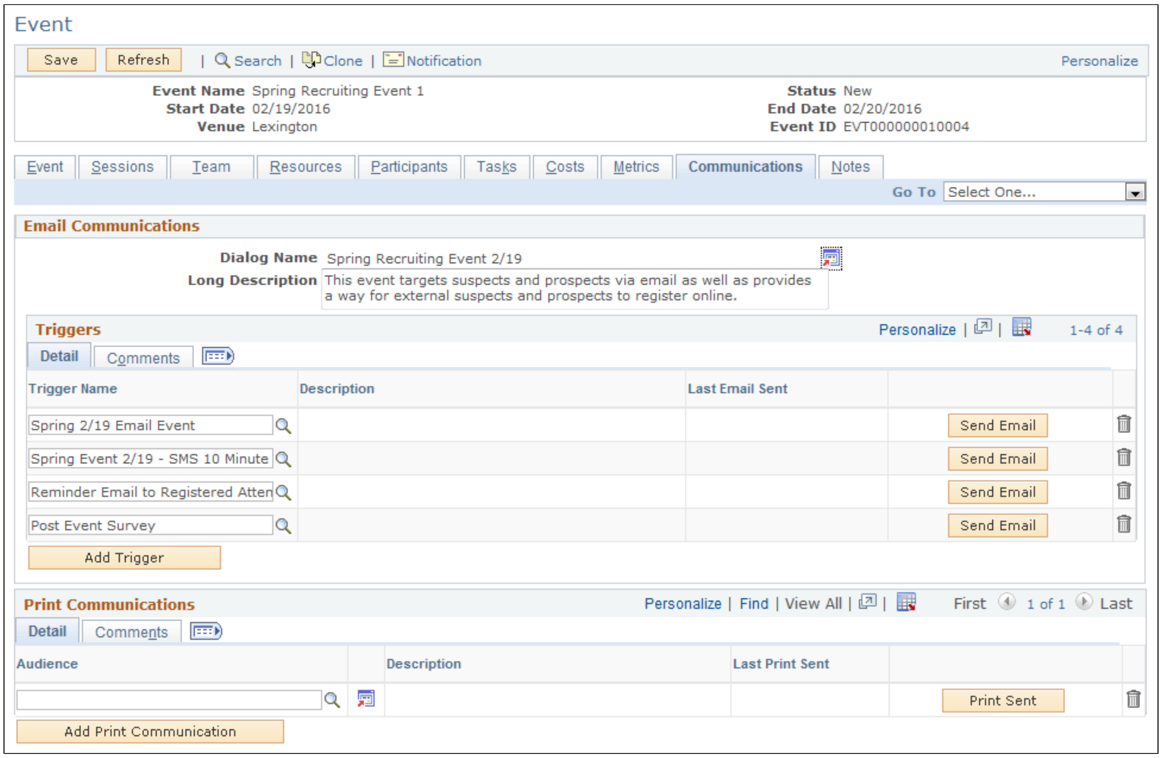
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Communications tab on the Event page.

This example illustrates the fields and controls on the Event - Communications page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Go To
Select One...
Email Communications
Triggers
Personalize
1-4 of 4
Detail
Comments
Trigger Name
Description
Last Email Sent
Send Email
Add Trigger
Print Communications
Personalize | Find | View All
First
1 of 1
Last
Detail
Comments
Audience
Description
Last Print Sent
Print Sent
Add Print Communication

Event Name Spring Recruiting Event 1
Start Date 02/19/2016
Venue Lexington
Status New
End Date 02/20/2016
Event ID EVT000000010004

Dialog Name Spring Recruiting Event 2/19
Long Description This event targets suspects and prospects via email as well as provides a way for external suspects and prospects to register online.

| Trigger Name | Description | Last Email Sent |
|---|---|---|
| Spring 2/19 Email Event | | |
| Spring Event 2/19 - SMS 10 Minute | | |
| Reminder Email to Registered Atten | | |
| Post Event Survey | | |

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

## Email Communications

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Dialog Name | Select an Online Marketing dialog from the list of choices. The list displays all dialogs that:<br>• Are not in the *Archived* or *Completed* status.<br>• Have the **Trigger On Demand** check box selected. |
| Description | A description of the selected Online Marketing dialog. |
| Trigger Name | The name of the trigger on the selected dialog. |
| Trigger Description | Description of the selected trigger. |

| ***Field or Control*** | ***Description*** |
|---|---|
| Last Email Sent | The last time the **Send Email** button was clicked to launch the action. |
| Send Email | Click this button to launch the selected processes on the selected dialog. |
| Add Trigger | Click this button to add another trigger to the list. |

The typical email communications flow is as follows:

1. Create a participant list using the Participant tab (by loading audiences, manually adding participants, and so forth).
2. Create an audience that consists of all the participants for whom the Invited check box has not been selected.
3. Associate the audience to a bulk email action and associate a trigger to one or more bulk mail actions.
4. When you click the Send button, the email is sent to all of the participants based on the audience that has been defined.
5. After the email process is complete, the Invited check boxes are updated with all of the participants who received an invitation through the email process.
6. The Last Email sent timestamp is updated and the event is set to *Executing*.

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

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

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

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

**Note:** Though you cannot add the same trigger twice, it is possible to temporarily do so if you add a trigger, do not click Save, and then add the same trigger again. If you temporarily add a trigger more than once, emails can be sent from each iteration of the trigger.

The dialog must be live in order to send email.

See “Understanding Flows” (PeopleSoft Online Marketing).

### Print Communications

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

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Audience | Select an audience from the available list. Note that audiences that are not in the Committed state might appear as empty. If this occurs, the system takes the information from the audience record itself rather than the list of Committed audiences. |
| Print Sent | Click to view a history of which print communications were sent, when they were sent, and the audience they were sent to. When you click this button, a message is displayed informing you that the system is setting the Last Print Set field, and that audience correspondence must be initiated in the Audience component. You can click the icon next to the Audience field to transfer to the Audience component. |

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# Creating Leads from Events

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

## Pages Used to Create Leads from Events

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Create Leads Page | RA_CREATE_LEADS | Create sales leads from audiences, marketing campaigns, and events. |
| Lead Qualify Page | RSF_LEAD_QUALIFY | Associate sales leads and opportunities with events. |

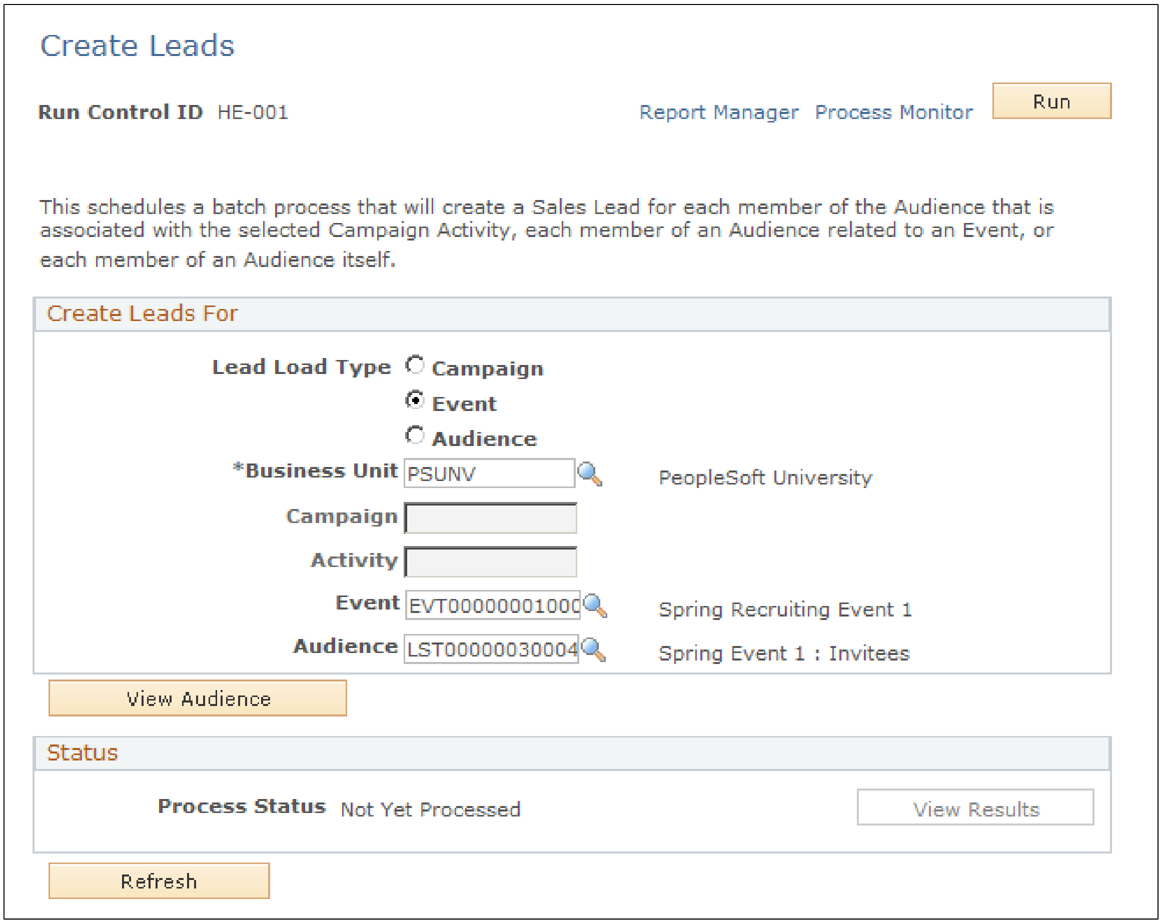
## Create Leads Page

Use the Create Leads page (RA_CREATE_LEADS) to create sales leads from audiences, marketing campaigns, and events.

Navigation:

**Marketing** > **Execution** > **Manual Leads Creation**

This example illustrates the fields and controls on the Create Leads page.



**Run Control ID** HE-001

This schedules a batch process that will create a Sales Lead for each member of the Audience that is associated with the selected Campaign Activity, each member of an Audience related to an Event, or each member of an Audience itself.

**Lead Load Type** ○ **Campaign** ● **Event** ○ **Audience**

***Business Unit** PSUNV PeopleSoft University

**Campaign**

**Activity**

**Event** EVT00000001000 Spring Recruiting Event 1

**Audience** LST00000030004 Spring Event 1 : Invitees

**Process Status** Not Yet Processed

| ***Field or Control*** | ***Description*** |
|---|---|
| Lead Load Type | Select *Audience*, *Campaign*, or *Event*. Depending on which option you select, different options on the page will become available. |
| Business Unit | Select a business unit from the list of choices. |
| Campaign | This option becomes available only if you select *Campaign* in the**Lead Load Type** field. |

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

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

## Manually Associating Leads and Opportunities with Events

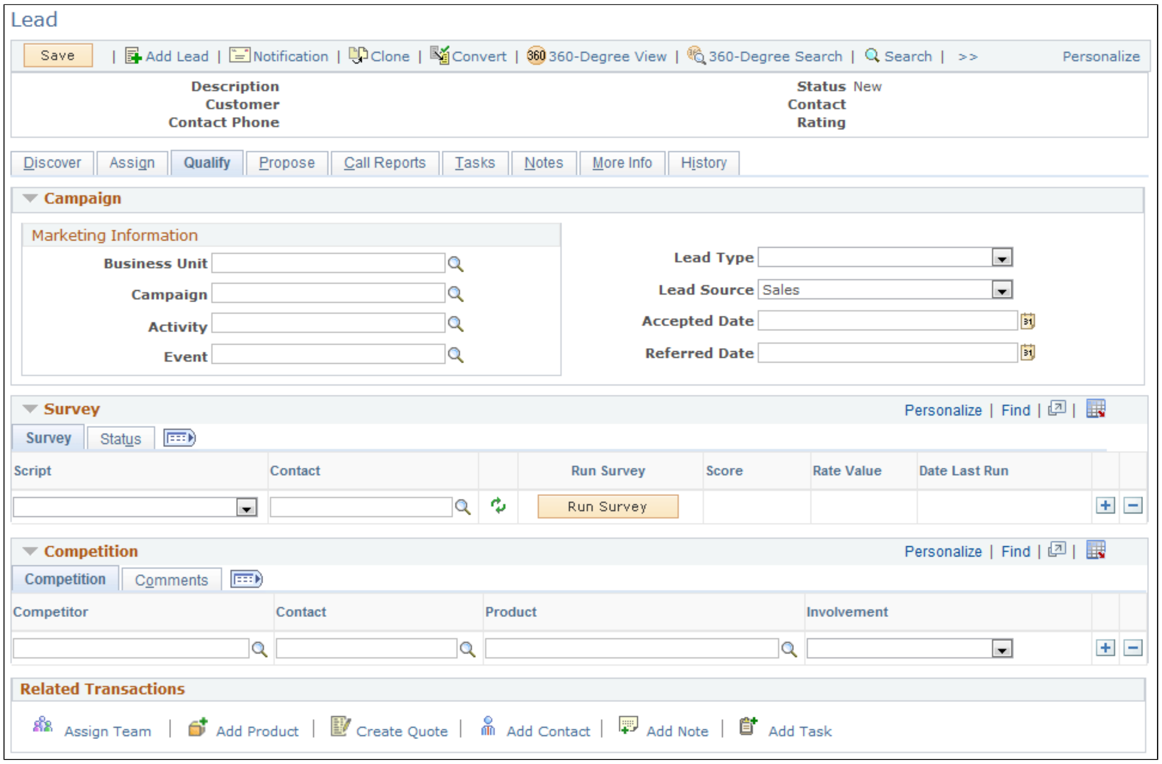
Use the Lead - Qualify page (RSF_LEAD_QUALIFY) to manually associate sales leads and opportunities with events.

Navigation:

**Sales** > **Search Leads**

Click the Qualify tab.

This example illustrates the fields and controls on the Lead - Qualify page.


Lead
Save
Add Lead
Notification
Clone
Convert
360-Degree View
360-Degree Search
Search
>>
Personalize
Description
Customer
Contact Phone
Contact
Rating
Discover
Assign
Qualify
Propose
Call Reports
Tasks
Notes
More Info
History
Campaign
Marketing Information
Business Unit
Campaign
Activity
Event
Lead Type
Accepted Date
Referred Date
Survey
Personalize | Find
Survey
Status
Script
Contact
Run Survey
Score
Rate Value
Date Last Run
Run Survey
Competition
Personalize | Find
Competition
Comments
Competitor
Contact
Product
Involvement
Related Transactions
Assign Team
Add Product
Create Quote
Add Contact
Add Note
Add Task

Status New

Lead Source Sales

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

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

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Event | Select an event from the available list to associate an event with this lead. |
| Lead Source | Select *Marketing Event* from the list of choices. |

See “Creating a Sales Lead” (PeopleSoft Sales) and “Creating a Sales Opportunity” (PeopleSoft Sales).

## Chapter 5

# Analyzing Events

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## Using Metrics

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

## Page Used to View Metrics

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Event - Metrics Page | RAE_EVENT_METRICS | View metrics associated with an event. |

## Event - Metrics Page

Use the Event - Metrics page (RAE_EVENT_METRICS) to view metrics associated with an event.

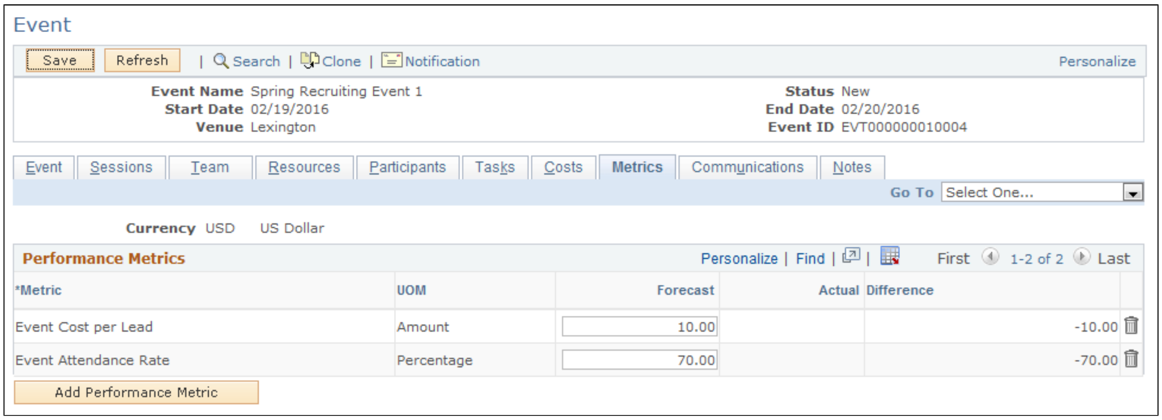
Navigation:

**Marketing** > **Marketing Programs**

Select an event from the list, or create a new event.

Click the Metrics tab on the Event page.

This example illustrates the fields and controls on the Event - Metrics page.


Event
Save
Refresh
Search
Clone
Notification
Personalize
Event
Sessions
Team
Resources
Participants
Tasks
Costs
Metrics
Communications
Notes
Go To
Select One...
Personalize | Find
First
1-2 of 2
Last
Add Performance Metric

**Event Name** Spring Recruiting Event 1
**Start Date** 02/19/2016
**Venue** Lexington
**Status** New
**End Date** 02/20/2016
**Event ID** EVT000000010004

**Currency** USD US Dollar

**Performance Metrics**

| *Metric | UOM | Forecast | Actual | Difference |
|---|---|---|---|---|
| Event Cost per Lead | Amount | 10.00 | | -10.00 |
| Event Attendance Rate | Percentage | 70.00 | | -70.00 |

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

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

| ***Field or Control*** | ***Description*** |
|---|---|
| Metrics | Select a metric from the list of choices. Metrics are calculated when the page is opened, so current values are displayed.<br>**Note:** You can define your own metrics using the Metrics - Detail page in PeopleSoft Marketing. Refer to the Marketing documentation for more information. |
| UOM (Unit of Measurement) | Determined based upon the metric selected. |
| Forecast Value | This value is entered manually. When the metric is calculated, the system subtracts the actual value from the forecasted value, resulting in the difference value. |
| Actual Value | The computed value from the metric. |
| Difference | The Actual Value minus the Forecast Value. |
| Currency | The Currency Code, as entered on the Events page. |

Supported metrics for events include:

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

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

## Related Links

“Defining and Creating Metrics” (PeopleSoft Marketing)