PeopleSoft CRM 9.2: PeopleSoft Marketing

August 2023

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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. 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

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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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Chapter 1

Getting Started with PeopleSoft Marketing

PeopleSoft CRM Marketing Overview

PeopleSoft Marketing enables users to manage all of the complex components of a marketing program. PeopleSoft Marketing functionality is based on the concept of marketing programs, which includes campaigns and activities, online marketing dialogs, and roll ups. A marketing campaign is an initiative by a campaign team to achieve a specific marketing objective, such as launching a new product, raising awareness of existing products, or cultivating customer loyalty. An activity represents action taken as part of a marketing campaign. An online dialog enables you to define an internet marketing channel (dialog) to run an internet campaign from start to finish. A roll up is a program created to serve as a parent to one or more child programs.

Essentially, the purpose of a marketing program is to communicate message to consumers about your product or services. Issues of who you contact (audience), how you reach them (channel), what collateral materials you use to support your message (content), and what you use to encourage them to buy (offer) are all part of what makes up the campaign activity.

Related Links

PeopleSoft Online Marketing

PeopleSoft CRM Marketing Business Processes

PeopleSoft CRM Marketing applications provide the following business processes:

- Manage campaign content.
- Define offers.
- Define and generate audiences.
- Contact prospects directly, using the PeopleSoft Online Marketing application.
- Measure campaign results.

We discuss these business processes in the business process topics in this documentation.

PeopleSoft CRM Marketing Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that 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, as well as links to the corresponding documentation.

Other Sources of Information

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

See also *PeopleTools: Setup Manager*

Chapter 2

Navigating in PeopleSoft Marketing

Navigating in PeopleSoft Marketing

PeopleSoft Marketing provides custom functional area navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note: In addition to PeopleSoft Marketing custom navigation pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

Related Links

Application Fundamentals

Pages Used to Navigate in PeopleSoft Marketing

This table lists the custom navigation pages that are used to navigate in PeopleSoft Marketing.

Marketing Center

The Marketing Center custom navigation pages are geared to the person in your organization who is focused on developing and maintaining various marketing programs and audiences, as well as on running analyses.

Page Name	***Navigation***	***Usage***
Marketing Center	Select Marketing Center under the main menu.	Access primary Marketing Center menu options and activities.
Marketing Programs	Click Marketing Programs on the Marketing Center page.	Access Marketing Programs to create or edit marketing programs, such as campaigns, dialogs, or roll ups.
Dialog Designer	Click Dialog Designer on the Marketing Center page.	Access the dialog designer to create or edit marketing dialogs.
Marketing Programs	Click Marketing Programs on the Marketing Center page.	View program summary information, and sort or filter by program attributes.
Outbound Calls	Click Outbound Calls on the Marketing Center page.	Conduct outbound campaigns, contact prospects, and record call outcomes.

Page Name	***Navigation***	***Usage***
Audiences	Click Audiences on the Marketing Center page.	Define and manage target audiences and segments.
Audience Lists	Click Audience Lists on the Marketing Center page.	Access the Audience Search page.
Audience Segments	Click Audience Segments on the Marketing Center page.	Access the Audience Search page.
Profile Definitions	Click Profile Definitions on the Marketing Center page.	Manage marketing profile definitions.
Data Import	Click Data Import on the Marketing Center page.	Import data.
Data Import Global Settings	Click Data Import Global Settings on the Data Import page.	Specify data import global settings.
Data Import Templates	Click Data Import Templates on the Data Import page.	Access data import templates.
Run Data Import	Click Run Data Import on the Data Import page.	Run the data import.
View Import Status	Click View Import Status on the Data Import page.	View import status.
Edit Matching SQL	Click Edit Matching SQL on the Data Import page.	Allow editing of Matching SQL Statements
Enterprise Content and Offers	Click Enterprise Content and Offers on the Marketing Center page.	Manage marketing collateral and setup offers.
Manage Offers	Click Manage Offers on the Marketing Center page.	Create offers based on product, base price, and discount information.
Marketing Collaterals	Click Marketing Collaterals on the Marketing Center page.	Manage marketing content for targeted audiences.

Page Name	***Navigation***	***Usage***
Analysis	Click Analysis on the Marketing Center page.	Discover and gain insights into customers, programs, and products.
Interactive Reports	Click Interactive Reports on the Analysis page.	View the Marketing Performance and Forecast Analysis.
Campaign Performance Forecast	Click Campaign Performance Forecast on the Analysis page.	View the Campaign Performance/ Forecast Analysis.
Dialog Performance Forecast	Click Dialog Performance Forecast on the Analysis page.	View the Dialog Performance/Forecast Analysis.
Operational Reports	Click Operational Reports on the Analysis page.	View quality reports.
Document Responses	Click Document Responses on the Operational Reports page.	Search for document responses.
Individual Responses	Click Individual Responses on the Document Responses page.	Search for individual responses.
Overall Responses	Click Overall Responses on the Document Responses page.	Search for overall responses.
Campaign Management	Click Campaign Management on the Operational Reports page.	Request a campaign management report.
Content Management	Click Content Management on the Operational Reports page.	Request a content management report.
Campaign-Content Management	Click Campaign-Content Management on the Operational Reports page.	Request a campaign-content management report.
Campaign Effectiveness	Click Campaign Effectiveness on the Operational Reports page.	Request an effectiveness report based on business unit, status, and date range.
Campaign Expense	Click Campaign Expense on the Operational Reports page.	Request a campaign expense report.

Page Name	***Navigation***	***Usage***
Activity Effectiveness	Click Activity Effectiveness on the Operational Reports page.	Request an activity effectiveness report based on business unit, status, and date.
Campaign Activity Effective	Click Campaign Activity Effective on the Operational Reports page.	Request a campaign and activity report based on business unit and date range.
Task Management	Click Task Management on the Operational Reports page.	Request a task management report.
Campaign ROI (Return On Investment)	Click Campaign ROI on the Operational Reports page.	Request a return-on-investment report.
Campaign Count by Score	Click Campaign Count by Score on the Operational Reports page.	Request a report of campaign counts by score.

Marketing Analysis Center

The Marketing Analysis Center custom navigation pages that follow are geared toward the person in your organization who focuses on performing marketing analysis tasks:

Page Name	***Navigation***	***Usage***
Marketing Analysis Center	Select Marketing Analysis Center under the main menu.	Access primary Marketing Analysis Center menu options and activities.
Marketing Programs	Click Marketing Programs on the Marketing Analysis Center page.	Manage marketing programs and activities.
Marketing Programs	Click Marketing Programs on the Marketing Programs page.	View program summary information, and sort or filter by program attributes.
Dialog Designer	Click Dialog Designer on the Marketing Programs page.	Access the dialog designer to create or edit marketing dialogs.
Outbound Calls	Click Outbound Calls on the Marketing Programs page.	Conduct outbound campaigns, contact prospects, and record call outcomes.
Audiences	Click Audiences on the Marketing Analysis Center page.	Define and manage target audiences and segments.

Page Name	***Navigation***	***Usage***
Audience Lists	Click Audience Lists on the Audiences page.	Access the Audience Search page.
Audience Segments	Click Audience Segments on the Audiences page.	Access the Audience Search page.
Profile Definitions	Click Profile Definitions on the Marketing Center page.	Manage marketing profile definitions.
Data Import	Click Data Import on the Audiences page.	Import data.
Data Import Global Settings	Click Data Import Global Settings on the Data Import page.	Specify data import global settings.
Data Import Templates	Click Data Import Templates on the Data Import page.	Access data import templates.
Run Data Import	Click Run Data Import on the Data Import page.	Run the data import.
View Import Status	Click View Import Status on the Data Import page.	View import status.
Edit Matching SQL	Click Edit Matching SQL on the Data Import page.	Allow editing of Matching SQL Statements
Customer Behavior Modeling	Click Customer Behavior Modeling on the Marketing Analysis Center page.	Consolidate customer data across the enterprise. Build and use predictive models and scores.
Marketing Analysis	Click Marketing Analysis on the Marketing Analysis Center page.	Discover and gain insight into customers, programs, and products.
Operation Reports	Click Operation Reports on the Marketing Analysis page.	View quality reports.
Document Responses	Click Document Responses on the Operation Reports page	View individual and overall responses.

Page Name	***Navigation***	***Usage***
Individual Responses	Click Individual Responses on the Document Responses page.	Search for individual responses.
Overall Responses	Click Overall Responses on the Document Responses page.	Search for overall responses.
Campaign Management	Click Campaign Management on the Operation Reports page.	Request a campaign management report.
Content Management	Click Content Management on the Operation Reports page.	Request a content management report.
Campaign-Content Management	Click Campaign-Content Management on the Operation Reports page.	Request a campaign-content management report.
Campaign Effectiveness	Click Campaign Effectiveness on the Operation Reports page.	Request an effectiveness report based on business unit, status, and date range.
Campaign Expense	Click Campaign Expense on the Operation Reports page.	Request a campaign expense report.
Activity Effectiveness	Click Activity Effectiveness on the Operation Reports page.	Request an activity effectiveness report based on business unit, status, and date.
Campaign Activity Effective	Click Campaign Activity Effective on the Operation Reports page.	Request a campaign and activity report based on business unit and date range.
Task Management	Click Task Management on the Operation Reports page.	Request a task management report.
Campaign ROI	Click Campaign ROI on the Operation Reports page.	Request a return-on-investment report.
Campaign Count by Score	Click Campaign Count by Score on the Operation Reports page.	Request a report of campaign counts by score.
Interactive Reports	Click Interactive Reports on the Marketing Analysis page.	View the Marketing Performance and Forecast Analysis.

Page Name	***Navigation***	***Usage***
Campaign Performance Forecast	Click Campaign Performance Forecast on the Analysis page.	View the Campaign Performance/ Forecast Analysis.
Dialog Performance Forecast	Click Dialog Performance Forecast on the Analysis page.	View the Dialog Performance/Forecast Analysis.

Chapter 3

Defining PeopleSoft Marketing Business Units

Understanding PeopleSoft Marketing Business Units

PeopleSoft Marketing business units enable you to associate campaigns with specific offices for organizational and reporting purposes.

A business unit represents an operational entity—generally a branch office within your organization. Every marketing campaign that you create is associated with a business unit that represents a branch office within your organization.

This organizational structure helps you to locate the campaigns that you need because you can limit searches by business unit. Define a default business unit so that you do not need to specify your home business unit every time that you access the system. Specify a business unit only when you need to access another business unit.

You also filter results in PeopleSoft Marketing by business unit.

Defining PeopleSoft Marketing Business Units

To set up PeopleSoft Marketing business units, use the Marketing Definition (RA_BUS_UNIT_GBL) component.

This topic discusses how to define PeopleSoft Marketing business units.

Page Used to Define PeopleSoft Marketing Business Units

Page Name	***Definition Name***	***Usage***
Marketing Definition Page	RA_BUS_UNIT_TBL	Define PeopleSoft Marketing business units.

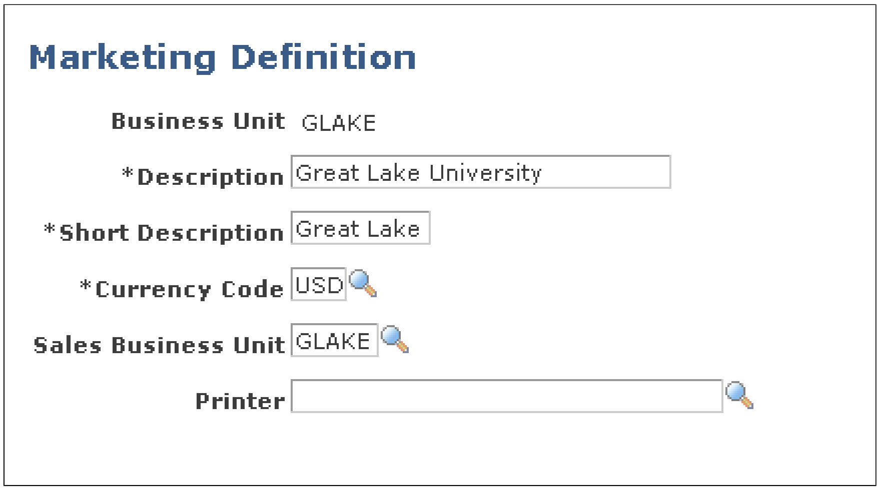
Marketing Definition Page

Use the Marketing Definition page (RA_BUS_UNIT_TBL) to define PeopleSoft Marketing business units.

Navigation:

Set Up CRM > **Business Unit Related** > **Marketing Definition**

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



Field or Control	Description
Default SetID	Select the default setID to associate with the business unit. **Note:** The system displays this field only when you define a new business unit that has not already been defined elsewhere within PeopleSoft Customer Relationship Management (PeopleSoft CRM).
Currency Code	Select the default monetary unit in which you conduct transactions in this business unit.
Sales Business Unit	Select the PeopleSoft Sales business unit that you want to associate with this marketing business unit.
Printer	Select a printer name for correspondence management.
Create Business Unit	Click to save and create the new business unit. This is the same as clicking the **Save** button. **Note:** The system displays this button only when you define a new business unit that has not already been defined elsewhere within PeopleSoft CRM.

Chapter 4

Setting Up PeopleSoft Marketing

Setting Up CRM Application Security for PeopleSoft Marketing

This topic describes how to set up CRM application security for Marketing.

Related Links

Application Fundamentals

Pages Used to Set Up CRM Application Security for PeopleSoft Marketing

Page Name	***Definition Name***	***Usage***
Membership List Page	RSEC_MEMBER_SMRY	Set up a membership list.
Add Membership List Page	RSEC_ML_ROLE	Add a new membership list.
"Functional Option Page" (Application Fundamentals)	RSEC_FUNC_DEFN	Use these system-delivered items as display templates.
Functional Option Group Page	RSEC_FUNC_GROUP	Set up a functional option group for PeopleSoft Marketing users.
Security Profile Page	RSEC_PROFILE	Create a new security profile to contain the membership list and functional option group.

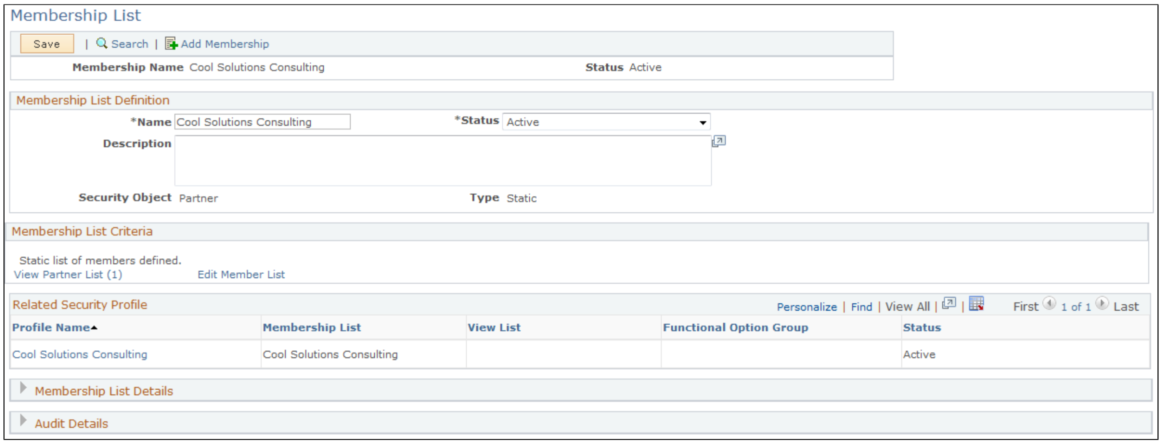
Membership List Page

Use the Membership List page (RSEC_MEMBER_SMRY) to set up a membership list.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Search Membership List**

This example illustrates the fields and controls on the Membership List page.



This page includes all the roles to which PeopleSoft Marketing users will be assigned. If needed, you can use multiple membership lists.

Add Membership List Page

Use the Add Membership List page (RSEC_ML_ROLE) to manage a membership list.

Navigation:

Click the **Edit Member List** link on the Membership List page to edit the list, or click the **View Role List** link to view it.

The Add Membership List page displays the security objects (role, person, and so forth) included in this membership list. You can edit the objects.

Field or Control	***Description***
Name	Enter the name of the security object.
Add Role	Click to add a new role to the list.

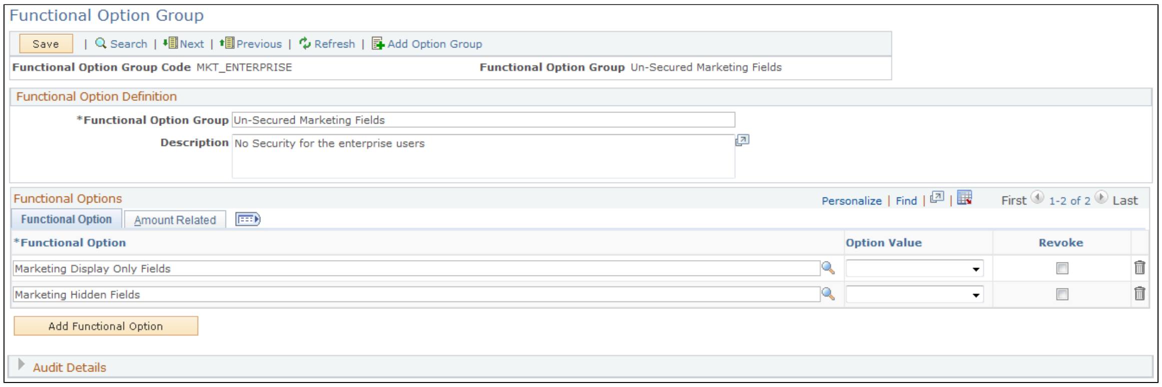
Functional Option Group Page

Use the Functional Option Group page (RSEC_FUNC_GROUP) to set up a functional option group for PeopleSoft Marketing users.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Functional Option Group**

This example illustrates the fields and controls on the Functional Option Group page.



The **Option Value** field should be blank for both functional options.

Related Links

Application Fundamentals

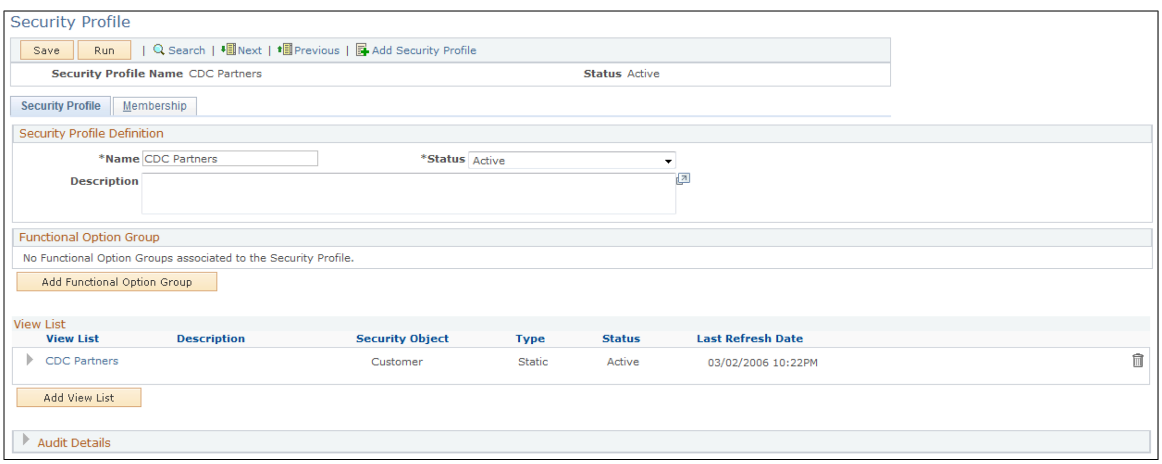
Security Profile Page

Use the Security Profile page (RSEC_PROFILE) to create a new security profile to contain the membership list and functional option group.

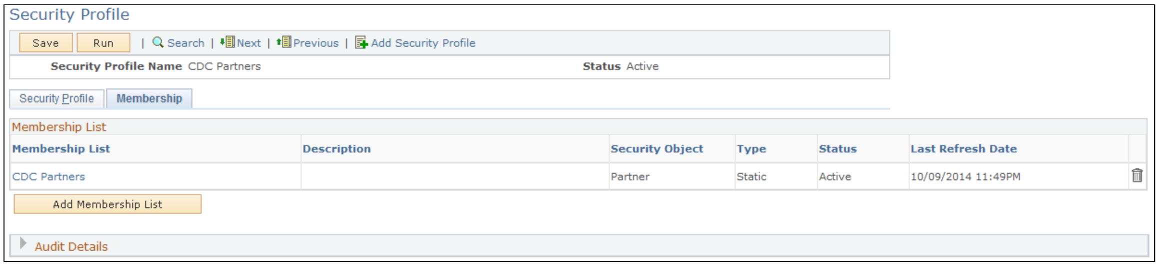
Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Search Security Profile**

This is the first of two examples illustrating the fields and controls on the Security Profile page.



This is the second of two examples illustrating the fields and controls on the Security Profile page.



All membership lists that you create must be attached to a security profile. This step links the membership roles to the functional option groups that control the security on the Marketing Programs pages using display templates.

Related Links

Application Fundamentals

Setting Dataset Security for PeopleSoft Marketing

This topic describes how to set dataset security for Marketing programs.

Page Used to Set Dataset Security for PeopleSoft Marketing

Page Name	***Definition Name***	***Usage***
Dataset Rules Page	EOEC_DATASET	Set dataset security for marketing programs.

Related Links

Application Fundamentals

Dataset Rules Page

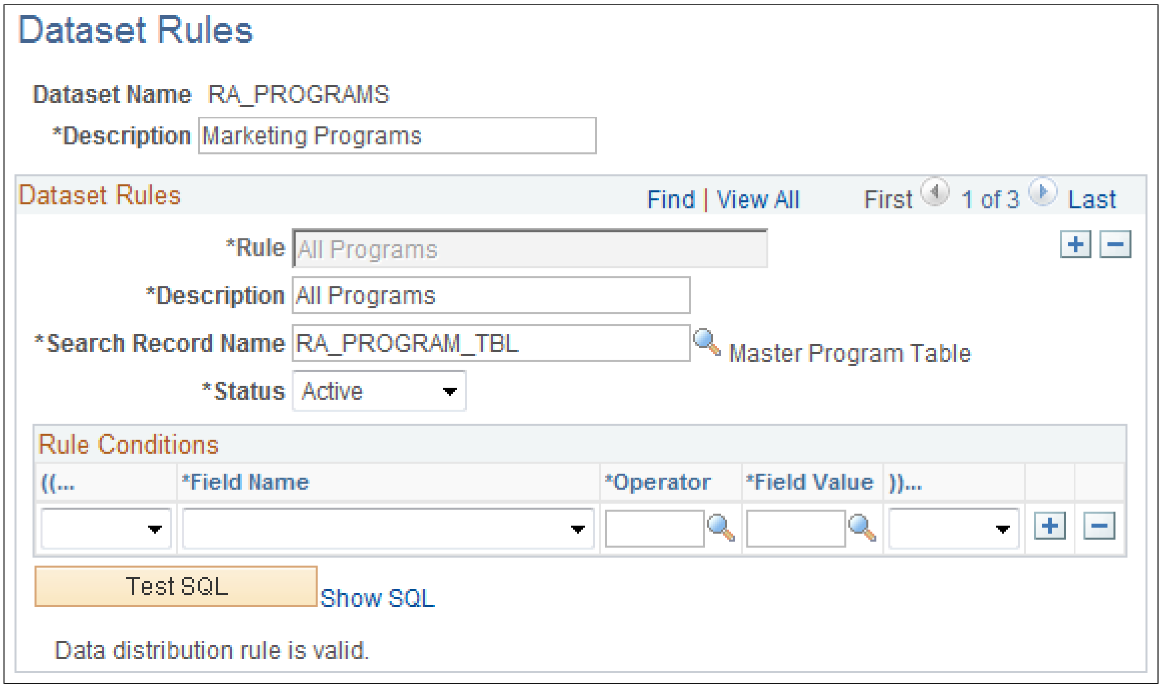
Use the Dataset Rules page (EOEC_DATASET) to set dataset security for marketing programs.

Navigation:

Enterprise Components > **Component Configurations** > **Datasets** > **Dataset Rules**

Select the RA_PROGRAMS dataset.

This example illustrates the fields and controls on the Dataset Rules page.



These rules are attached to the standard delivered marketing rules. If you set up your own rules, you must also set up the corresponding rules. If you use existing roles, you must verify that the delivered rules attached to these roles are correct for your roles.

Setting Display Templates for PeopleSoft Marketing

This topic describes how to set display templates for PeopleSoft Marketing. To set display templates for PeopleSoft Marketing, use the Component Configuration (RA_COMP_CFG) component.

Related Links

Automation and Configuration Tools

Pages Used to Set Display Templates for PeopleSoft Marketing

Page Name	***Definition Name***	***Usage***
Display Template Page	RDT_TMPL_PAGE	Set display template for marketing.
Component Configuration Page for Marketing	RA_COMP_CFG	Define the display templates to use when displaying the marketing components that use display templates.
System Data Option Page	RA_COMP_CFG	Modify display template data.

Display Template Page

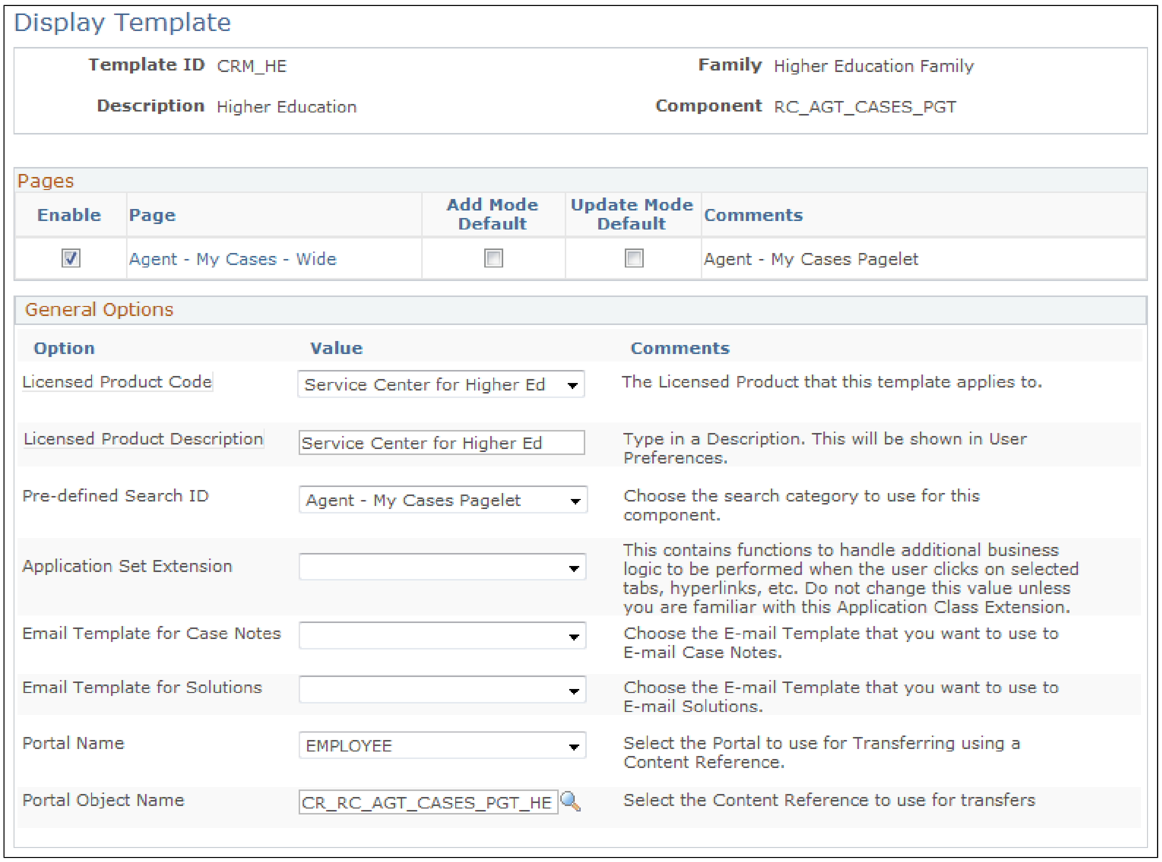
Use the Display Template page (RDT_TMPL_PAGE) to set up display templates for marketing.

Navigation:

Set Up CRM > **Common Definitions** > **Component Configuration** > **Display Templates** > **Display Template Details**

Select *Marketing* as the display template ID.

This example illustrates the fields and controls on the Display Template page.



Field level security is set by default for several fields. Refer to the display template documentation for further information.

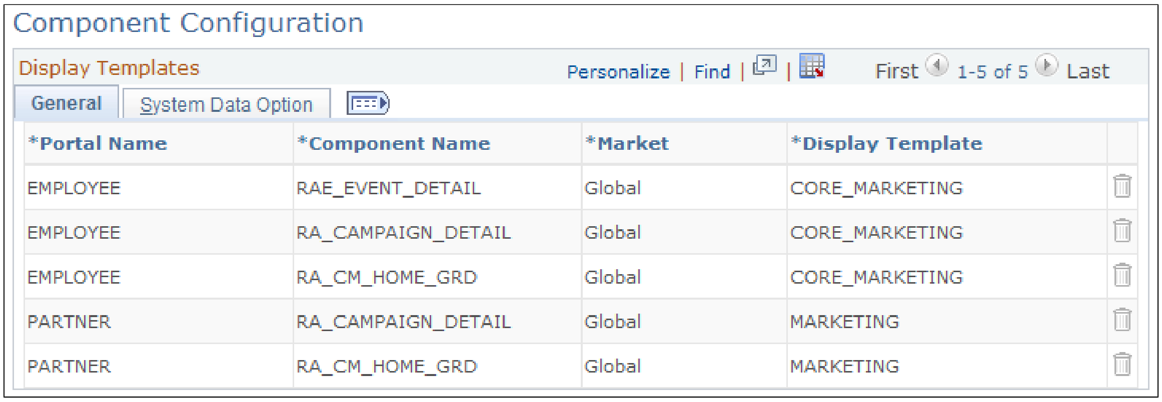
Component Configuration Page for Marketing

Use the Component Configuration page (RA_COMP_CFG) to define the display templates to use when displaying the marketing components that use display templates.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Component Configuration**

This example illustrates the fields and controls on the Component Configuration page (Marketing).



This page defines which display template to use when displaying the marketing components that use display templates. The page's information is based on the display templates that are defined by default, and the data is set up to use the default display template definitions.

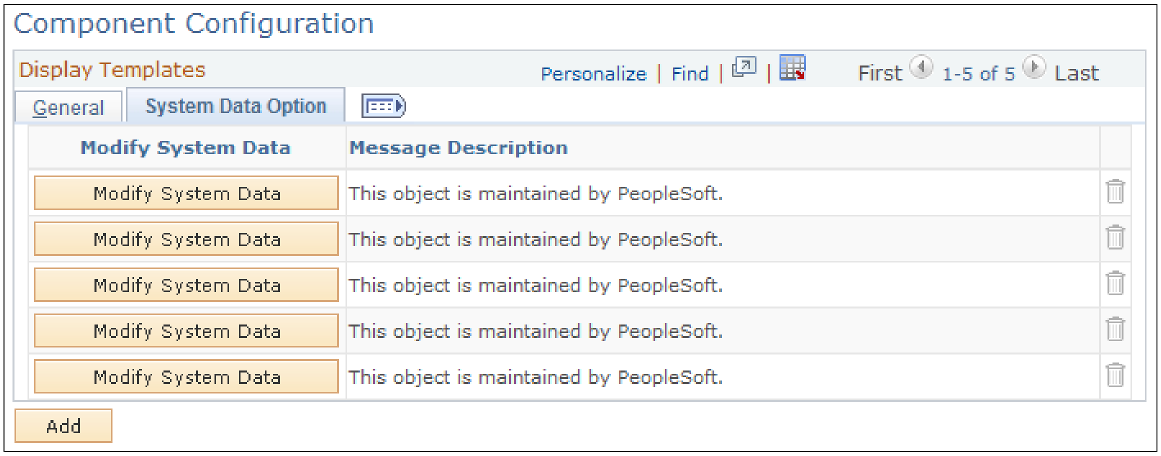
Field or Control	***Description***
Add	To add additional templates, click this button and then complete the necessary fields. Fields that you can added are: • **Portal Name** • **Component Name** • **Market** • **Display Template**

See “Understanding Display Templates” (Automation and Configuration Tools).

Modifying Data

Access the System Data Option page (select the System Data Option tab on the Component Configuration page).

This example illustrates the fields and controls on the System Data Option page.



Field or Control	***Description***
Modify System Data	Click to modify system data for the selected row. Select the General tab and modify the necessary fields. Fields that you can modify are: • **Portal Name** • **Component Name** • **Market** • **Display Template**

Setting Component Audit Information

This section describes how to set component audit information for PeopleSoft Marketing.

Page Used to Set Component Audit Information

Page Name	***Definition Name***	***Usage***
Component Audit Page	RA_UD_REQ_AUDIT	Set component audit information.

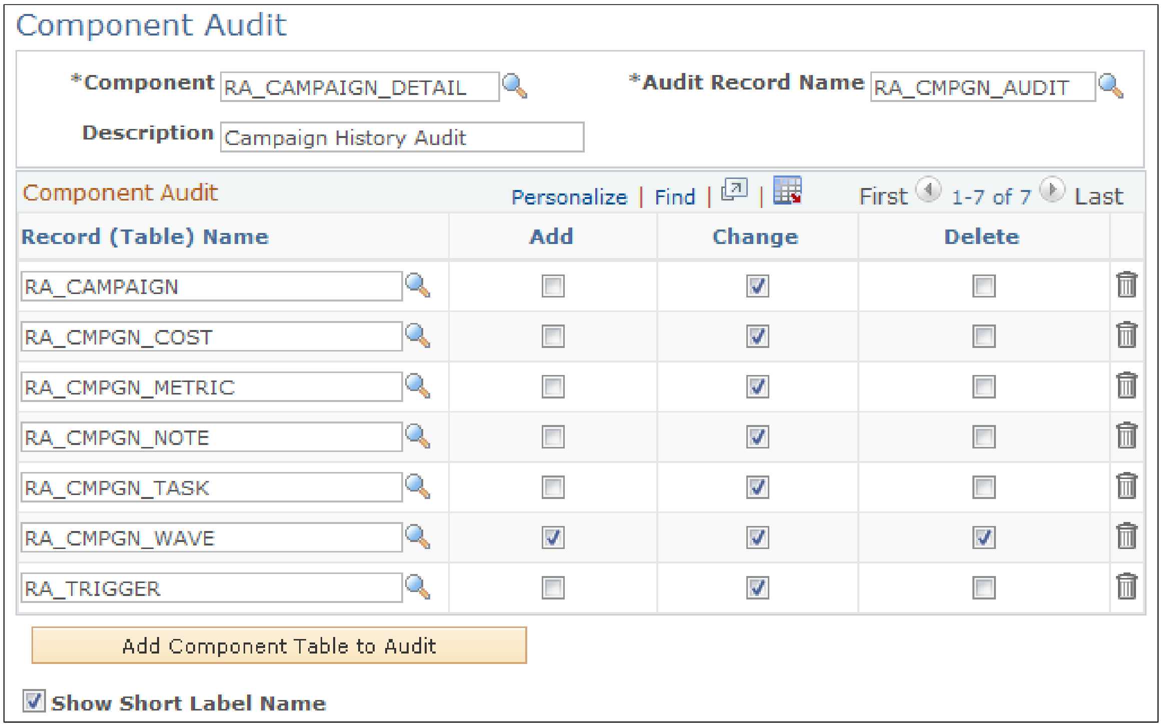
Component Audit Page

Use the Component Audit page (RA_UD_REQ_AUDIT) to set component audit information.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Marketing Campaign Audit**

This example illustrates the fields and controls on the Component Audit page.



This page controls what appears on the History page of the Marketing Program - Campaign Component page, under the Audit tab.

Field or Control	***Description***
Component	Select a component from the available list.
Audit Record Name	Select an audit record from the available list.
Record (Table) Name	Select a record from the available list.
Add	Select this check box to display history information on the Audit History page if a new record is added.
Change	Select this check box to display history information on the Audit History page if the record is changed.
Delete	Select this check box to display history information on the Audit History page if the record is deleted.

If you do not want to display any audit history for a record, clear all three check boxes for that record.

Defining Campaign Elements

This topic provides an overview of campaign elements and details how to define the campaign elements.

Pages Used to Define Campaign Elements

Page Name	***Definition Name***	***Usage***
Marketing Objectives Page	RA_UD_CMPGN_OBJ	Define campaign, dialog, and activity objectives.
Campaign and Activity Statuses Page	RA_UD_CMPGN_STAT	Define campaign and activity statuses.
Status Rules Page	RA_UD_STAT_CMB1	Define status rules by establishing valid status changes for campaign objects.
Budget Sources Page	RA_UD_BUDGT_SRC	Define budget sources.
Program Control Page	RA_PROGRAM_CONTROL	Define information about PeopleSoft Marketing programs.
Trigger Schedules Page	RA_SCHEDULE	Define trigger schedules by setting up system schedules to check when to run campaign triggers.

Understanding Campaign Elements

The following objective codes are delivered with the system under the SHARE setID. You can modify or delete the delivered codes, or add additional codes as needed:

Code	***Objective***	***Description***
ACQU	Acquisition	Acquire new customers.
AWAR	Awareness	Increase awareness of your products or services within your target audiences.
CSEL	Cross Sell	Encourage members of your target audience to purchase products or services that complement those that they have already bought or intend to buy.
EVNT	Events	Host an event, such as a meeting, party, seminar, or class.

Code	***Objective***	***Description***
INTR	Internal	Promote interest in your products or services among members of your own organization.
LOYA	Loyalty	Encourage your target audience to make an emotional commitment to using your products or services.
PRES	Press and Analyst Relations	Communicate with journalists and others who might report on your products or services.
LAUN	Product Launch	Introduce new products or services.
USEL	Up Sell	Encourage your target audience members to purchase products or services that are of higher value or more expensive than those that they already intend to buy.

The following status codes are delivered:

Status Code	***Status***	***Description***
APPR	Approved	Approved by reviewer.
ARCH	Archived	Hidden from standard view. You can find archived campaigns and activities only by entering *Archived* in your search parameters.
CMPL	Completed	Ended on the established campaign end date.
DCLN	Decline	Declined by reviewer.

Status Code	***Status***	***Description***
EXEC	Executing	Being carried out. Before you can change a campaign or activity status to *Executing,* these three associated elements must have the following statuses: Collateral must have the status *Completed.* Offers must have the status *Completed.* Audiences must have the status of either *Approved* or *Committed.* The EXEC (executing) status drives a number of actions within PeopleSoft Marketing. For example, setting the status of a campaign to *Executing* enables you to set associated activities to *Executing* also. Setting an activity to *Executing* causes the system to validate any associated audiences, collateral, offers, and scripts. Associated audiences are also set to a status of *Committed.* Also, if the activity channel execution method is *SFA,* associated audiences' leads are pushed to the PeopleSoft Sales application.
IREV	In Review	In review.
NEW	New	Initial design phase.
STOP	Stopped	Canceled before the established campaign end date.
TRIG	Trigger Approved	Approved by the reviewer and ready to switch to *Execution* status by means of a trigger (not manually).

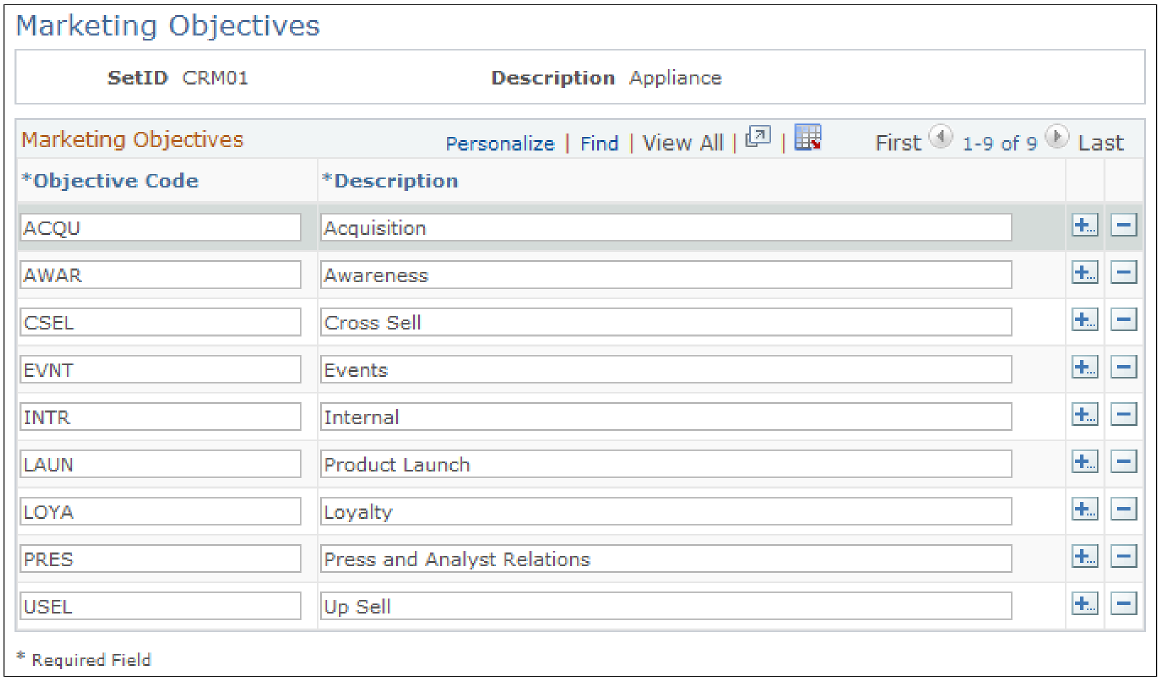
Marketing Objectives Page

Use the Marketing Objectives page (RA_UD_CMPGN_OBJ) to define campaign, dialog, and activity objectives.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Objectives** > **Marketing Objectives**

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



Objective codes describe the goals of a campaign, a campaign activity, an offer and, if you have purchased PeopleSoft Online Marketing, an online dialog. Objectives are associated with campaigns on the Program Detail page and with activities on the Activity Details page.

Field or Control	*Description*
Objective Code	Enter a code that identifies the objective.
Description	Enter a description of the objective code.

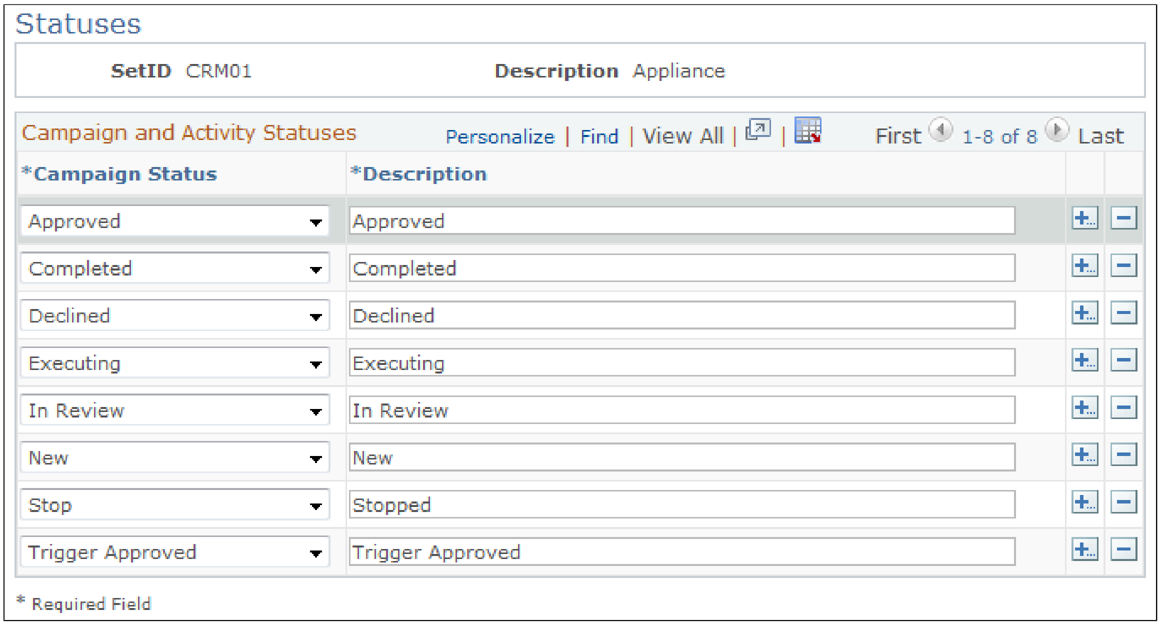
Campaign and Activity Statuses Page

Use the Campaign and Activity Statuses page (RA_UD_CMPGN_STAT) to define campaign and activity statuses.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Campaigns** > **Statuses** > **Campaign and Activity Statuses**

This example illustrates the fields and controls on the Campaign and Activity Statuses page.



Campaigns and activities pass through structured life cycles. You create a campaign or activity, define its attributes, associate objects with it (collateral, audiences, channels, and so on), send it for review, carry it out (if approved), complete it (unless you stop it prematurely), and archive it. At each stage in its life cycle, a campaign or activity has a status. You can also use status changes to drive workflow processes.

Field or Control	***Description***
Campaign Status	Enter the code that identifies the campaign and activities status. Oracle delivers a set of status codes under the SHARE setID. Do not modify the delivered values. You can add new values.
Description	Enter a description of the status code.

Note: Campaign and activity statuses are identical objects, although you use them separately.
Do not change or remove campaign object statuses that Oracle delivers predefined with your system. If you define new statuses, then you must also define new status rules.

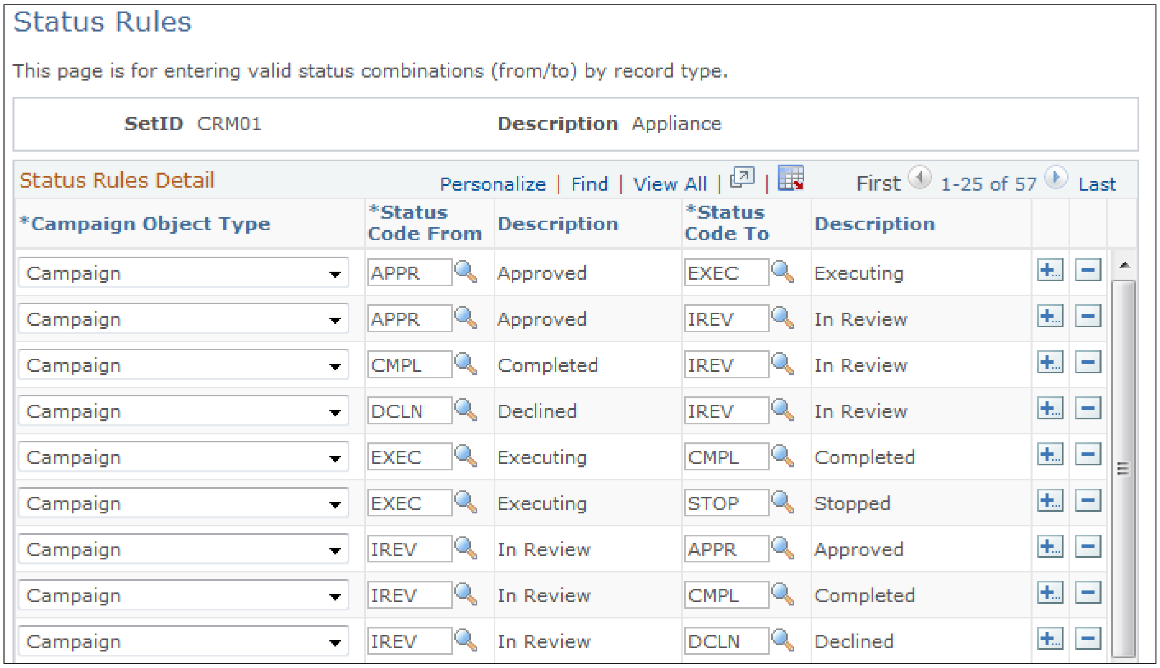
Status Rules Page

Use the Status Rules page (RA_UD_STAT_CMB1) to define status rules by establishing valid status changes for campaign objects.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Campaigns** > **Status Rules** > **Status Rules**

This is the first of two examples illustrating the fields and controls on the Status Rules page.



Status Rules

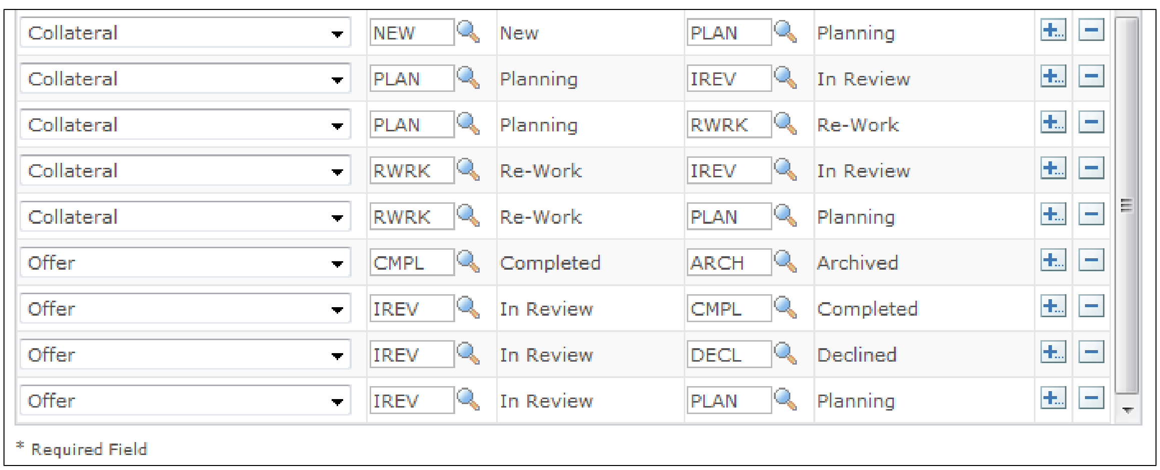
This page is for entering valid status combinations (from/to) by record type.

SetID CRM01 **Description** Appliance

Status Rules Detail — Personalize | Find | View All | First 1-25 of 57 Last

*Campaign Object Type	*Status Code From	Description	*Status Code To	Description
Campaign	APPR	Approved	EXEC	Executing
Campaign	APPR	Approved	IREV	In Review
Campaign	CMPL	Completed	IREV	In Review
Campaign	DCLN	Declined	IREV	In Review
Campaign	EXEC	Executing	CMPL	Completed
Campaign	EXEC	Executing	STOP	Stopped
Campaign	IREV	In Review	APPR	Approved
Campaign	IREV	In Review	CMPL	Completed
Campaign	IREV	In Review	DCLN	Declined

This is the second of two examples illustrating the fields and controls on the Status Rules page.



Collateral	NEW	New	PLAN	Planning
Collateral	PLAN	Planning	IREV	In Review
Collateral	PLAN	Planning	RWRK	Re-Work
Collateral	RWRK	Re-Work	IREV	In Review
Collateral	RWRK	Re-Work	PLAN	Planning
Offer	CMPL	Completed	ARCH	Archived
Offer	IREV	In Review	CMPL	Completed
Offer	IREV	In Review	DECL	Declined
Offer	IREV	In Review	PLAN	Planning

* Required Field

Status rules apply to virtually all PeopleSoft Marketing objects and determine which statuses your campaign objects cycle through and in what order. If you attempt to change an object's status contrary to the defined rules, you receive an error message and the system rejects the change. For example, the system rejects an attempt to change the status of a campaign from *New* to *Executing* without passing through the statuses of *In Review* and *Approved.*

Oracle delivers common status rules with your Marketing system. You can add new rules as needed.

Field or Control	*Description*
Campaign Object Type	Select the campaign object type that the status rule governs. Values are *Campaign, Campaign Task, Campaign Activity, Collateral, Collateral Task, Event,* and *Offer.*
Status Code From and **Status Code To**	Select status values for before and after the change. The values that are available depend on the object type selected.

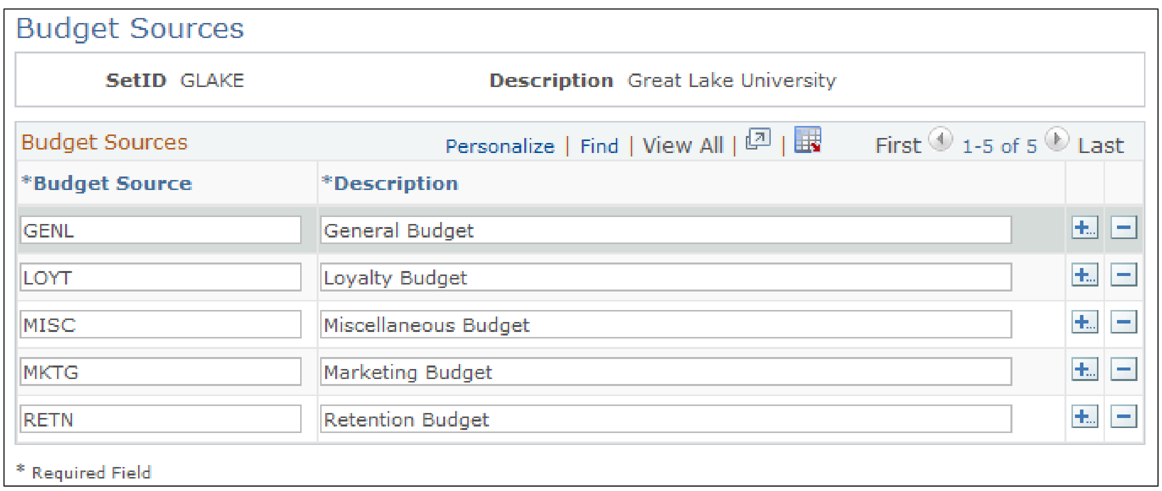
Budget Sources Page

Use the Budget Sources page (RA_UD_BUDGT_SRC) to define budget sources.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Campaigns** > **Budget Sources** > **Budget Sources**

This example illustrates the fields and controls on the Budget Sources page.



Budget source codes identify the source of funds used to cover the costs of a campaign. You associate budget source codes with campaigns using the Plan Campaign page.

Field or Control	*Description*
Budget Source	Enter a code that identifies the budget source.
Description	Enter a description of the budget source code.

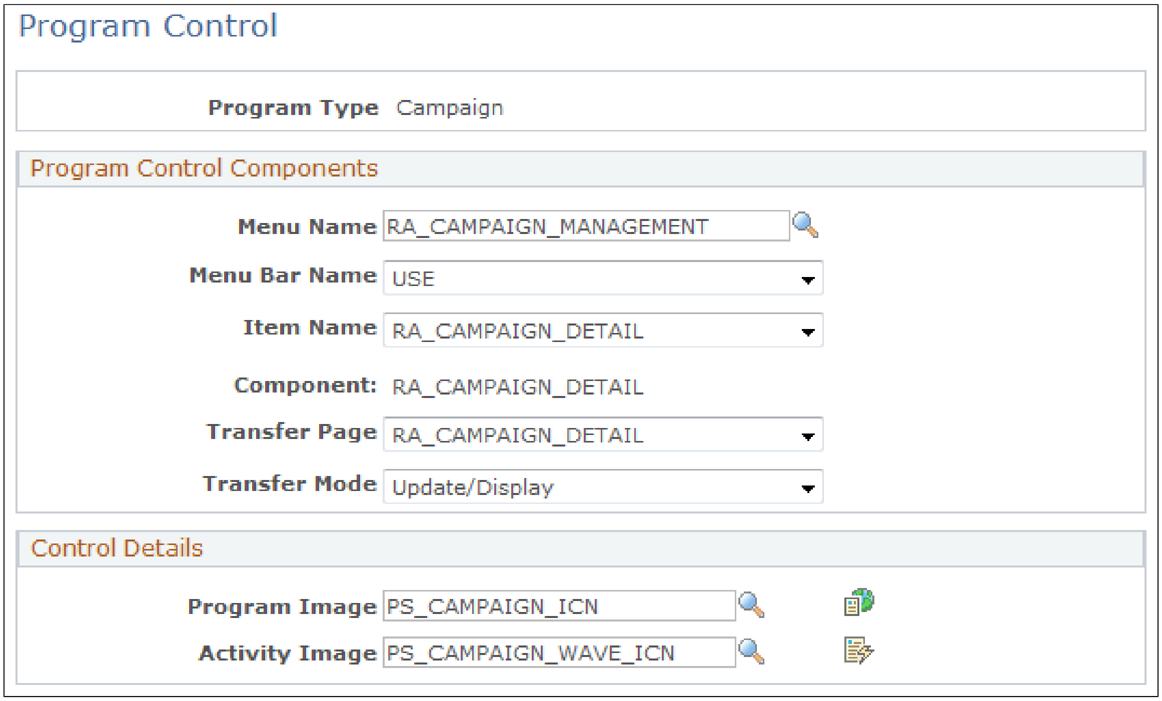
Program Control Page

Use the Program Control page (RA_PROGRAM_CONTROL) to define information about PeopleSoft Marketing programs.

Navigation:

Set Up CRM > Product Related > Marketing > Campaigns > Program Control > Program Control

This example illustrates the fields and controls on the Program Control page.



Field or Control	***Description***
Program Type	Select *Campaign, Roll Up,* or *Dialog.*
Menu Name	Do not modify this field; the menu name item is delivered as part of your system data.
Menu Bar Item	Do not modify this field; the menu bar item is delivered as part of your system data.
Item Name	Do not modify this field; the item name item is delivered as part of your system data.
Transfer Page	Do not modify this field; the transfer page item is delivered as part of your system data.
Transfer Mode	Do not modify this field; the transfer mode item is delivered as part of your system data.
Program Image	Use this button in conjunction with marketing programs. You can replace it with a different image.

Field or Control	Description
Activity Image	Use this button in conjunction with activities. You can replace it with a different image.

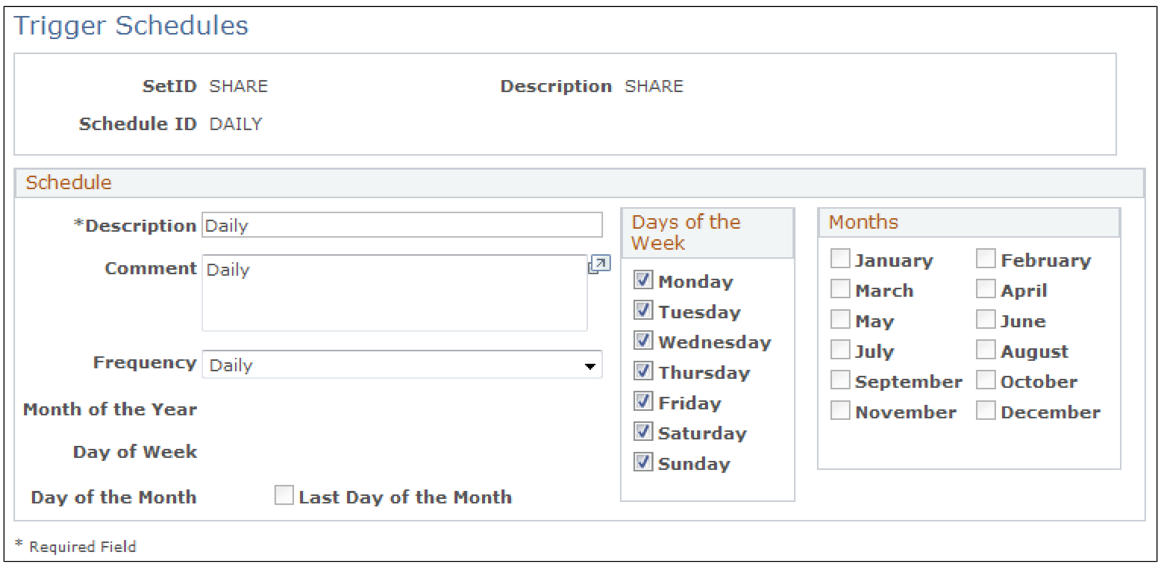
Trigger Schedules Page

Use the Trigger Schedules page (RA_SCHEDULE) to define trigger schedules by setting up system schedules to check when to run campaign triggers.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Campaigns** > **Trigger Schedules** > **Trigger Schedules**

This example illustrates the fields and controls on the Trigger Schedules page.



Using campaign triggers, your system can initiate campaign events at specified times or when specified conditions are met. For example, you might define a campaign with two activities: the first activity is a small test to determine how well the campaign is received and the second activity rolls the campaign out to the full audience. To launch the full roll out, use a metric to evaluate the response to the test activity. When the response reaches an established point, a trigger launches the second activity.

The campaign trigger schedule controls how frequently the campaign triggers that you establish are checked.

Field or Control	Description
Description	Enter a full description of the campaign trigger schedule.

Field or Control	***Description***
Frequency	Select the frequency with which the system checks campaign conditions pursuant to launching campaign triggers. Values are: *Annually:* The system checks campaign conditions annually. When you select this value, the **Month** and **Day of the Month** fields become available so that you can specify the date when the system checks campaign conditions every year. For example, you can set up your system to check campaign conditions every year on June 30. *Daily:* The system checks campaign conditions every week on specified days. When you select this value, the **Day of Week** field becomes available so that you can specify the days each week when the system checks campaign conditions. For example, you can set up your system to check campaign conditions every Monday, Wednesday, and Friday. **Note:** Select *Daily* to check campaign conditions multiple times each week. *Monthly:* The system checks campaign conditions every year on specified months. When you select this value, the **Month, Day of the Month,** and **Last Day of the Month** fields become available so that you can specify the day of the specified month when the system checks campaign conditions. For example, you can set up your system to check campaign conditions on the first day of January, April, July, and October. *User-Defined:* This value is reserved for future use. *Weekly:* The system checks campaign conditions every week on a specified day. When you select this value, the **Day of Week** field becomes available so that you can specify the day when the system checks campaign conditions every week. For example, you can set up your system to check campaign conditions every Tuesday. **Note:** Select *Weekly* to check campaign conditions only once a week. The schedule ID is free-form: you can use any name, but you should use something descriptive. For example, you might give the name W-FRI to a schedule that is to be run weekly every Friday.
Month of the Year	Select the month when the system is to check campaign conditions every year. This field is editable only when you select *Annually* in the **Frequency** field.
Day of Week	Select the day of the week when the system is to check campaign conditions. This field is available only when you select *Weekly* in the **Frequency** field.

Field or Control	***Description***
Day of the Month	Select the day of the month when the system is to check campaign conditions. This field is editable only when you select either *Monthly* or *Annually* in the **Frequency** field.
Last Day of the Month	Select when the system is to check campaign conditions on the last day of the month (February 28, April 30, July 31, and so forth). This field is available only when you select *Monthly* in the **Frequency** field.
Days of the Week	Select the days of the week on which the system is to check campaign conditions. This field is available only when you select *Daily* in the **Frequency** field.
Months	Select the months in which the system is to check campaign conditions each year. This field is available only when you select *Monthly* in the **Frequency** field.

Defining Channel Elements

This topic provides an overview of channel elements and discusses how to define channel activities. To define channel activities, use the Channel Activities (RA_UD_ACTIVITY) component. To define marketing channels, use the Marketing Channels (RA_UD_CHNL_TYPE) component. To define channel details, use the Channels (RA_UD_CHANNEL) component.

Pages Used to Define Channel Elements

Page Name	***Definition Name***	***Usage***
Channels - Activities Page	RA_UD_ACTIVITY	Define channel activities.
Marketing Channels Page	RA_UD_CHNL_TYPE	Define marketing channels.
Channels Page	RA_UD_CHANNEL	Define channel details.

Understanding Channel Elements

Oracle delivers the following activity codes with the system. You can add additional values:

Activity Code	***Short Description***	***Long Description***
BCST	Broadcast	Broadcast media, such as radio and television.

Activity Code	***Short Description***	***Long Description***
DRCT	Direct	Contacting potential customers individually, as with direct mail.
EVNT	Event	Events attended by potential customers.
INBD	Inbound	Communication initiated by potential customers, such as telephone calls, website visits, and email.
INTR	Internal	Communication within your organization.
PRNT	Print	Print media, such as newspapers and magazines.

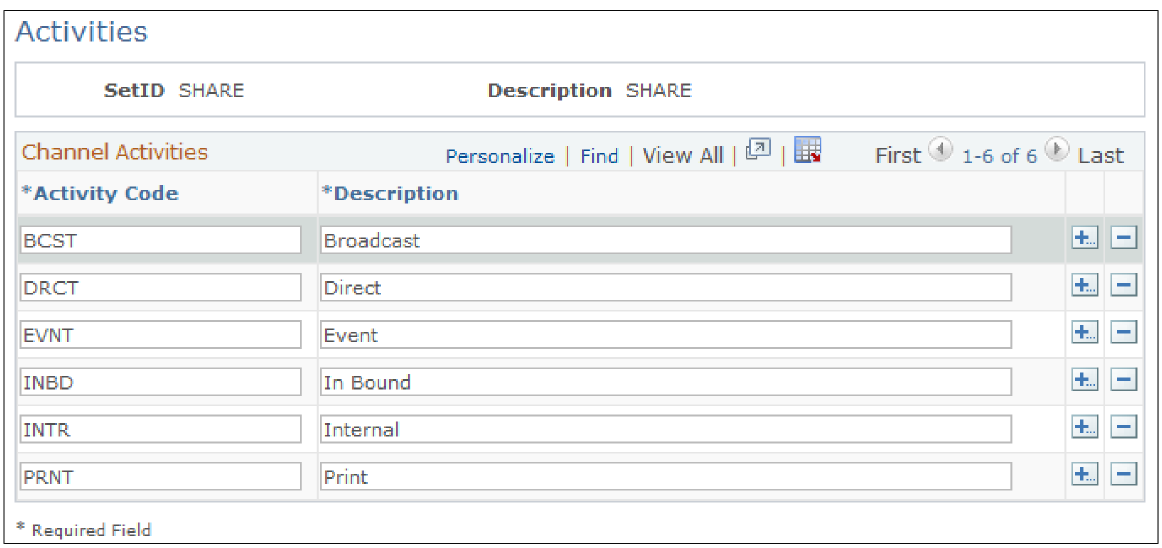
Channels - Activities Page

Use the Channels - Activities page (RA_UD_ACTIVITY) to define channel activities.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Channels** > **Activities**

This example illustrates the fields and controls on the Channels - Activities page.



Channel activity codes are associated with activities to indicate the broad category of tactics used to influence your target audience. For example, a broadcast activity includes all forms of broadcast communication, such as television, radio, and billboards. You associate channel activities with the campaign activity using the Activity Details page.

Field or Control	*Description*
Activity Code	Enter a code that identifies the channel activity.
Description	Enter a description of the channel activity.

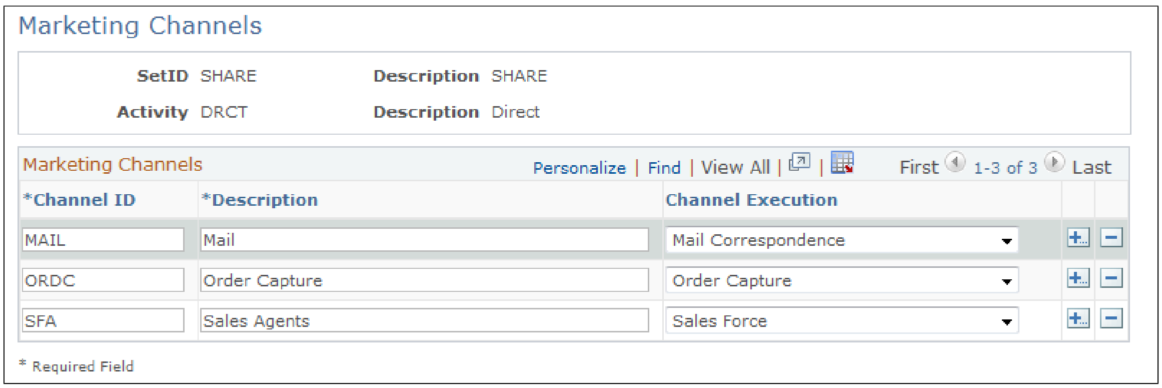
Marketing Channels Page

Use the Marketing Channels page (RA_UD_CHNL_TYPE) to define marketing channels.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Channels** > **Marketing Channel**

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



Warning! Marketing channel codes that Oracle delivers with the system are tied to PeopleCode processes. The delivered values appear under the SHARE SetID. You can add new codes, but do not modify the delivered codes.

Field or Control	*Description*
Channel ID	Enter a code that identifies the marketing channel.
Marketing Channel	Enter a description of the marketing channel. This description appears when the marketing channel is selected on the Campaign - Activities detail page.

Field or Control	***Description***
Channel Execution	Channel execution indicators drive the behavior of an activity when it is set to *Executing* (EXEC) status: Select a channel execution method. Values are: *Mail Correspondence:* Select to perform the marketing activity through direct mail. This method enables you to use Correspondence Management to generate document merges. *Order Capture:* Select to indicate that campaign activity is intended for internal use by the PeopleSoft Order Capture application. The result of this is that customers defined in the audience associated with this campaign activity are potentially eligible for upsell or cross-sell promotions. *Sales Force:* Select to indicate that the execution channel for the campaign activity is sales. When the campaign activity is set to *Executing,* the audience associated with the campaign activity is pushed to the PeopleSoft Sales application as a group of sales leads. **Note:** The value that you select in the **Channel Execution** field provides the sole control over which channel is used. The value that appears in the **Marketing Channel** field is merely a description.

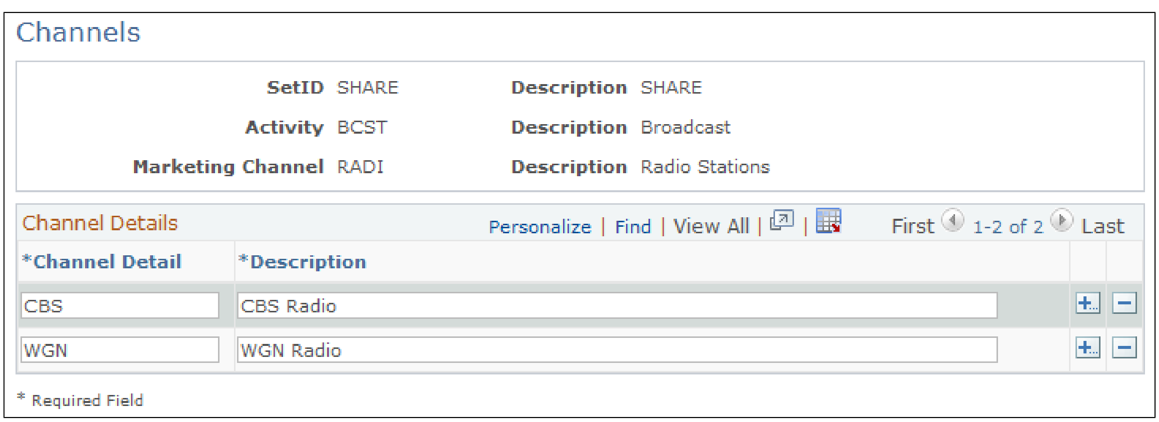
Channels Page

Use the Channels page (RA_UD_CHANNEL) to define channel details.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Channels** > **Channels** > **Channel**

This example illustrates the fields and controls on the Channels page.



Channel codes represent the specific media outlets that you use to deliver your message. You associate channel codes with an activity using the Activity Detail page.

Field or Control	***Description***
Channel Detail	Enter a code that identifies the channel.
Description	Enter a description of the specific media outlet.

Related Links

Marketing Programs - Activities Page

Defining Collateral Elements

Collateral refers to any materials used to deliver your campaign message. Collateral can be printed material, such as a flyer or magazine insert, a radio or television ad, or a script used by a marketing agent.

This topic discusses how to define collateral types and subtypes.

Note: Collateral type and collateral subtype are included for reporting organizational purposes and are fully modifiable: no system requirements exist for the codes, so you can define them as you want.

To define collateral types, use the Content Types (RA_UD_CONT_TYPE) component. To define collateral subtypes, use the Content Subtypes (RA_UD_CNT_STYPE) component.

Pages Used to Define Collateral Elements

Page Name	***Definition Name***	***Usage***
Collateral - Types Page	RA_UD_CONT_TYPE	Define collateral types.
Collateral - Sub Types Page	RA_UD_CNT_STYPE	Define collateral subtypes.

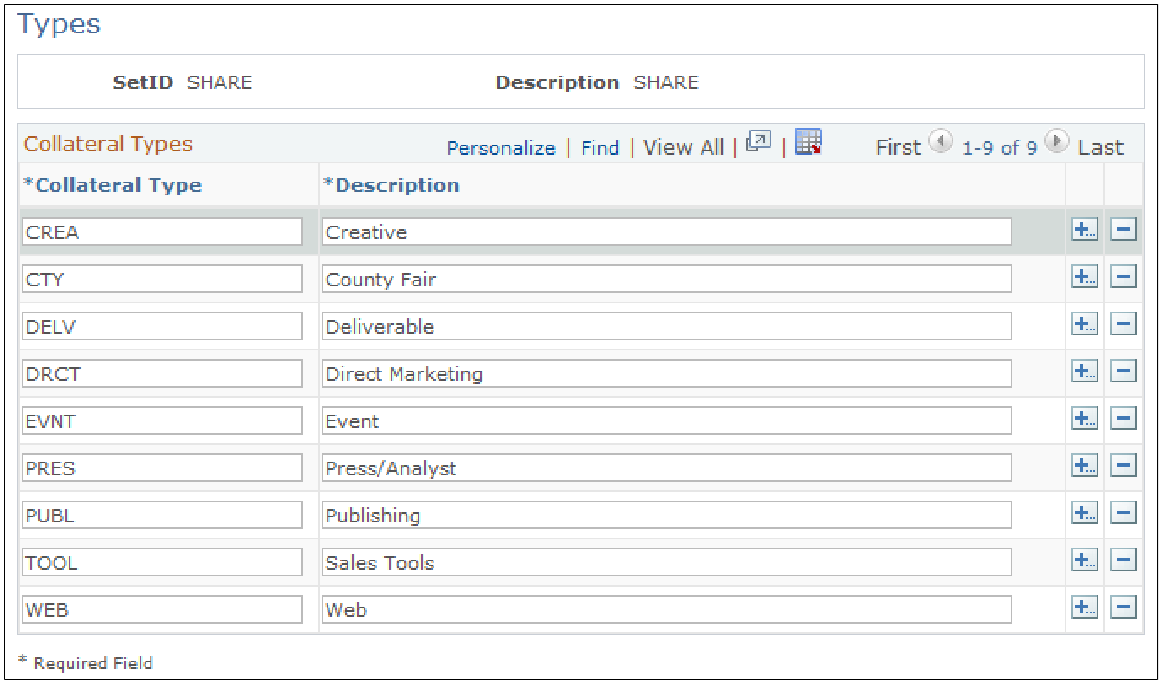
Collateral - Types Page

Use the Collateral - Types page (RA_UD_CONT_TYPE) to define collateral types.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Collateral** > **Identify Collateral Types**

This example illustrates the fields and controls on the Collateral - Types page.



Use collateral types to define broad categories of collateral.

Field or Control	***Description***
Collateral Type	Enter a code that identifies the collateral type.
Description	Enter a description of the collateral type.

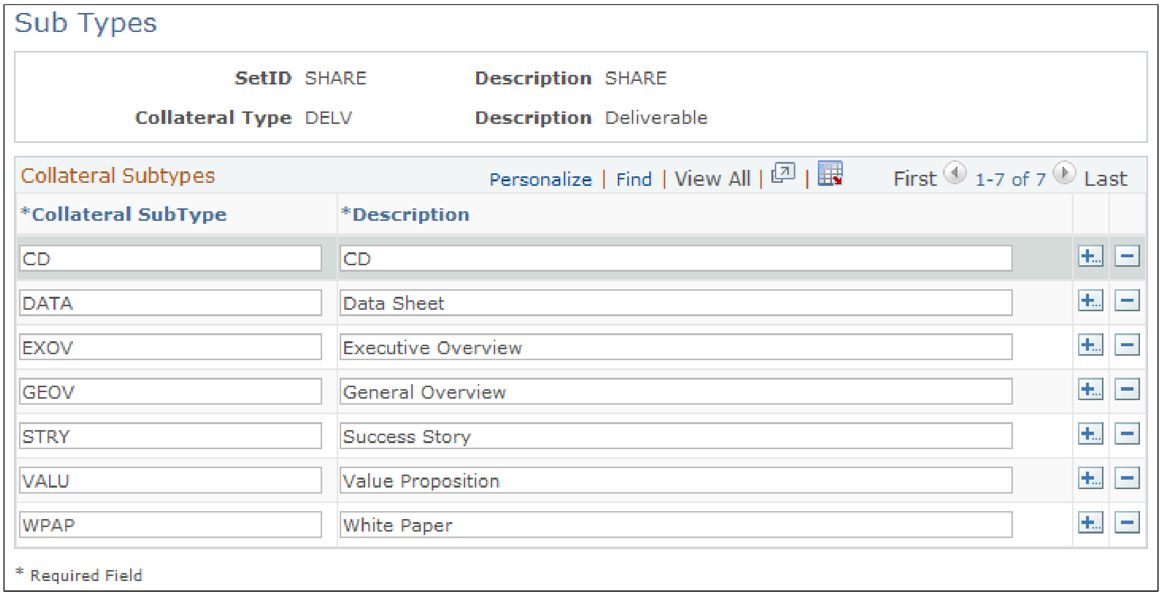
Collateral - Sub Types Page

Use the Collateral - Sub Types page (RA_UD_CNT_STYPE) to define collateral subtypes.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Collateral** > **Collateral Subtype**

This example illustrates the fields and controls on the Collateral - Sub Types page.



Use collateral subtypes in conjunction with collateral types to more narrowly define a particular type of collateral. A collateral type of print, for example, may include many subtypes, such as flyers, letters, brochures, and other forms of printed material.

Field or Control	***Description***
Collateral SubType	Enter a code that identifies the collateral subtype.
Description	Enter a description of the specific collateral subtype.

Defining Offer Options

This topic discusses how to define offer context and options. To define offer options, use the Offer Options (RA_OFFER_OPTIONS) component.

Pages Used to Define Offer Options

Page Name	***Definition Name***	***Usage***
Offer Context Page	RA_CONTEXT_SETUP	Use to enter allowable context for offer presentation.
Offer Options Page	RA_OFFER_OPTION	Use to select whether to use third-party optimization with offers.

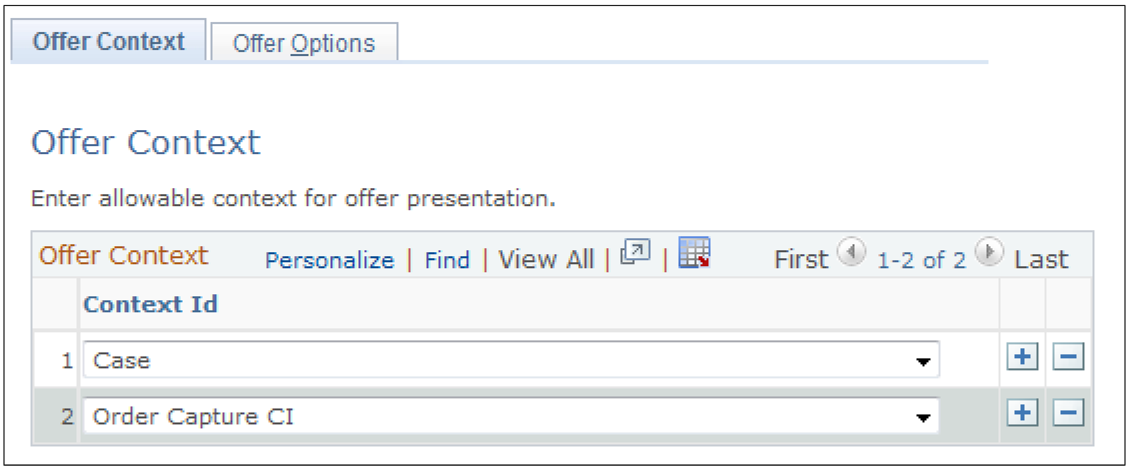
Offer Context Page

Use the Offer Context page (RA_CONTEXT_SETUP) to use to enter allowable context for offer presentation.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Offers** > **Offer Context**

This example illustrates the fields and controls on the Offer Context page.



Field or Control	*Description*
Context Id	The identifier for the allowable context for offer presentation.

Offer Options Page

Use the Offer Options page (RA_OFFER_OPTION) to use to select whether to use third-party optimization with offers.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Offers** > **Offer Options** > **Offer Options**

This example illustrates the fields and controls on the Offer Options page.

Field or Control	Description
Third Party Optimization	Select if you will use a third-party optimization engine for offer presentation.

Defining and Creating Metrics

This topic provides an overview of metrics and discusses how to define and create metrics.

Pages Used to Define and Create Metrics

Page Name	Definition Name	Usage
Metric Types Page	RA_UD_MET_TYPE	Define metric types.
Metric Subtypes Page	RA_UD_MET_STYPE	Define metric subtypes.
Metrics – Detail Page	RA_METRICS_SUMM	View summary information about all existing metrics under a setID.
Performance Metric Detail Page	RA_METRICS	Define and review metrics.

Understanding Metrics

Metrics are mechanisms for measuring. Some metrics are used to count, others to compare and calculate. You use metrics to evaluate the effectiveness of campaigns and activities and to trigger events.

Oracle delivers the most commonly used metrics with your PeopleSoft Marketing system. You can, however, create additional metrics when needed.

PeopleSoft Marketing is delivered with the following predefined metrics:

Metric Name	Description	Unit of Measure
Cost	Campaign activity level	Currency amount
Cost	Campaign level	Currency amount
Cost	Roll up level	Currency amount
Cost per Lead	Campaign activity level	Currency amount

Metric Name	***Description***	***Unit of Measure***
Cost per Lead	Campaign level	Currency amount
Cost per Lead	Roll up level	Currency amount
Cost per Quote	Campaign activity level	Currency amount
Cost per Quote	Campaign level	Currency amount
Cost per Quote	Roll up level	Currency amount
"Do Not Contact" Responses	Roll up level	Count
Lead to Quote ratio	Campaign activity level	Percentage
Lead to Quote ratio	Campaign level	Percentage
Lead to Quote ratio	Roll up level	Percentage
Number of Leads	Campaign activity level	Count
Number of Leads	Campaign level	Count
Number of Leads	Roll up level	Count
Number of Opportunities	Campaign activity level	Count
Number of Opportunities	Campaign level	Count
Number of Opportunities	Roll up level	Count
Number of Quotes	Campaign activity level	Count
Number of Quotes	Campaign level	Count
Number of Quotes	Roll up level	Count
Number of Responses	Campaign activity level	Count
Number of Responses	Campaign level	Count

Metric Name	***Description***	***Unit of Measure***
Number of Responses	Roll up level	Count
Opportunity to Quote ratio	Campaign activity level	Percentage
Opportunity to Quote ratio	Campaign level	Percentage
Opportunity to Quote ratio	Roll up level	Percentage
Order Revenue	Campaign activity level	Currency amount
Order Revenue	Campaign level	Currency amount
Order Revenue	Roll up level	Currency amount
Response Rate	Campaign activity level	Percentage
Response Rate	Campaign level	Percentage
Response Rate	Roll up level	Percentage
Response Rate-Outbound Mktng (response rate-outbound marketing)	Campaign activity level	Percentage
Revenue per Lead	Campaign activity level	Currency amount
Revenue per Lead	Campaign level	Currency amount
Revenue per Lead	Rollup level	Currency amount
Revenue per Quote	Campaign activity level	Currency amount
Revenue per Quote	Campaign level	Currency amount
Revenue per Quote	Roll up level	Currency amount
Revenue Variance	Roll up level	Currency amount
ROI (return on investment)	Campaign activity level	Currency amount
ROI (return on investment)	Campaign level	Currency amount

Metric Name	***Description***	***Unit of Measure***
ROI (return on investment)	Roll up level	Currency amount

The system links metrics to your campaigns through the following pages:

- Campaigns - Define Activities: Detail page.
- Campaigns - Triggers page.
- Campaigns - Performance page.
- Audiences - Costs page.
- Collateral - Costs page.

See Marketing Programs - Trigger Page, Marketing Programs - Performance Page, Audience - Costs Page, Marketing Programs - Activities Page, Manage Collateral - Costs Page.

Metrics that PeopleSoft delivers with your system fall within one of two metric subtypes. Each subtype falls within one of two metric types.

Metric Types Page

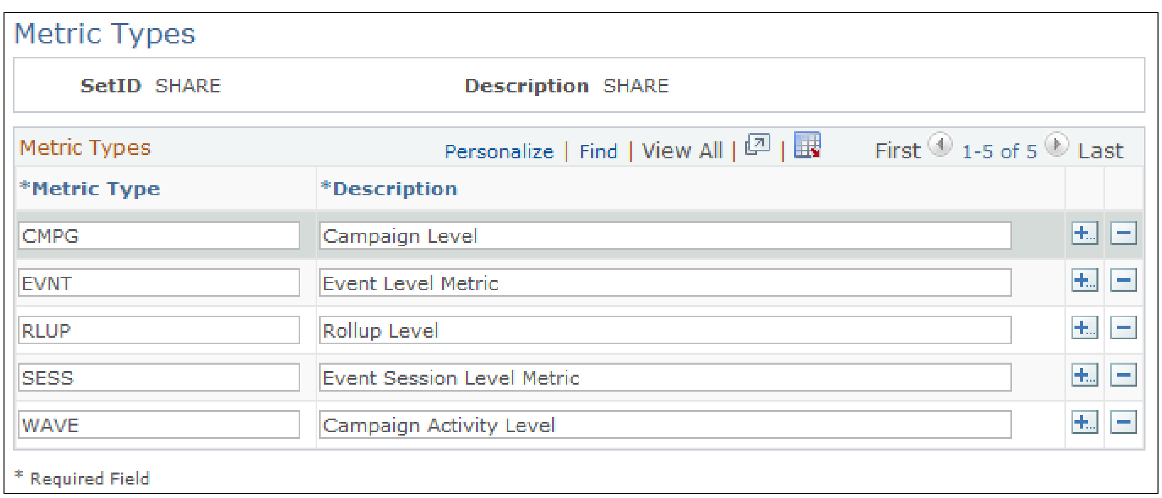
To define metric types, use the Metric Types (RA_UD_MET_TYPE) component.

Use the Metric Types page (RA_UD_MET_TYPE) to define metric types.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Metrics** > **Identify Metric Types** > **Metric Types**

This example illustrates the fields and controls on the Metric Types page.



Metric types classify the types of metrics that you create.

Field or Control	***Description***
Metric Type	Enter a code that identifies the metric type. Delivered values are *CMPG* (Campaign level), *RLUP* (Rollup level), and *WAVE* (Campaign Activity level).
Description	Enter a description of the general metric type.

Metric Subtypes Page

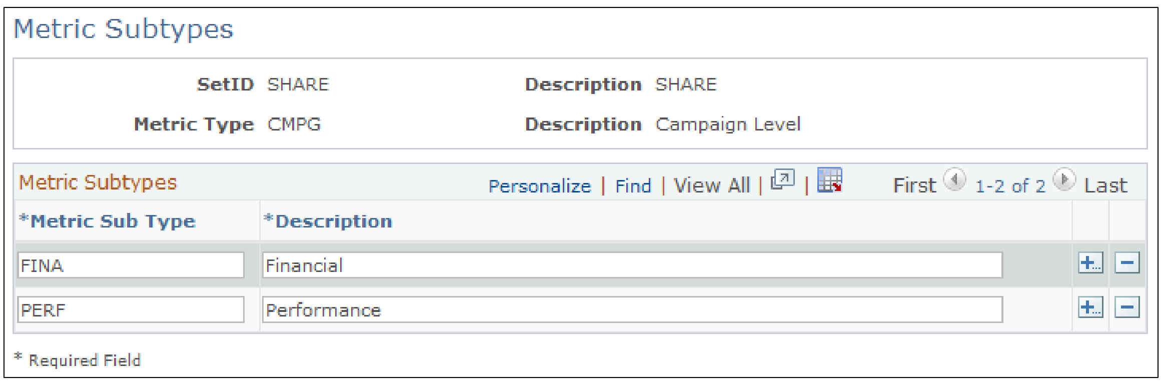
To define metric subtypes, use the Metric Subtypes (RA_UD_MET_STYPE) component.

Use the Metric Subtypes page (RA_UD_MET_STYPE) to define metric subtypes.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Metrics** > **Metric Subtype** > **Metric Subtypes**

This example illustrates the fields and controls on the Metric Subtypes page.



Metric subtypes are paired with a metric type to define a metric more specifically. For example, you might define a metric type for campaigns. Within that broad metric type, you might define separate metric subtypes for financial analysis and performance analysis.

Field or Control	***Description***
Metric Sub Type	Enter a code that identifies the metric subtype.
Description	Enter a description of the metric subtype.

Metrics – Detail Page

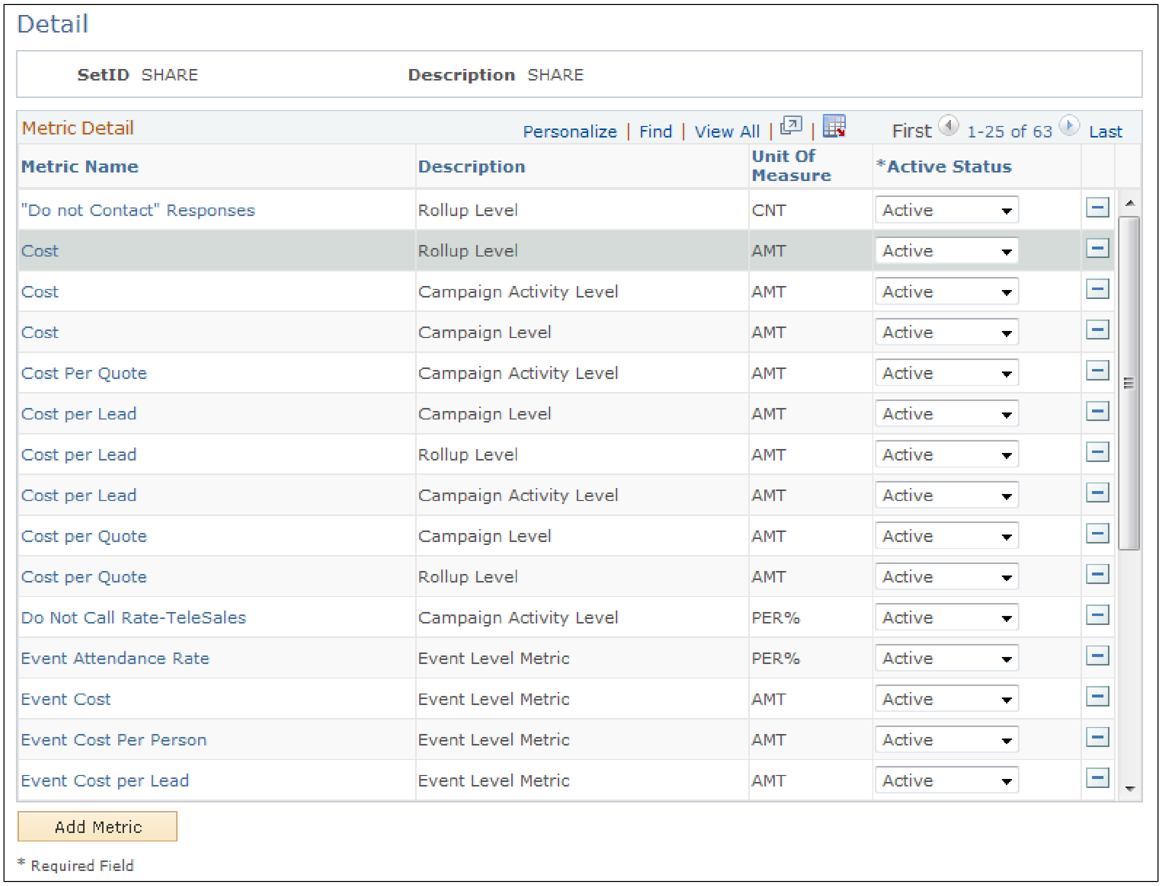
To view a summary of existing metrics, use the Metrics (RA_METRICS) component.

Use the Metrics - Detail page (RA_METRICS_SUMM) to view summary information about all existing metrics under a setID.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Metrics** > **Detail**

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



Metrics are grouped under a setID. Enter a setID on the Maintain Metrics page and click **Search** to access the Metrics - Detail page. A list of existing metrics appears.

Field or Control	***Description***
Metric Name	Displays a descriptive name of the metric. Click to access the Performance Metric Details page, where you can edit an existing metric.
Unit Of Measure	Displays the unit of measure used in the metric. Values are: • *%* (percent): Percentage of total. • *Count:* Number of the item being measured, for example, the number of leads, responses, or quotes. • *Amount:* Currency amount. • *Units:* Number of units.

Field or Control	Description
Active Status	Determines whether a metric is available for use. Select *Inactive* to remove a metric from use. Inactive metrics are unavailable and invisible outside of the Maintain Metrics - Performance Metric Details page. When you change a metric's status back to *Active* (the default setting), it functions normally again.
Add Metric	Add and define additional metrics.

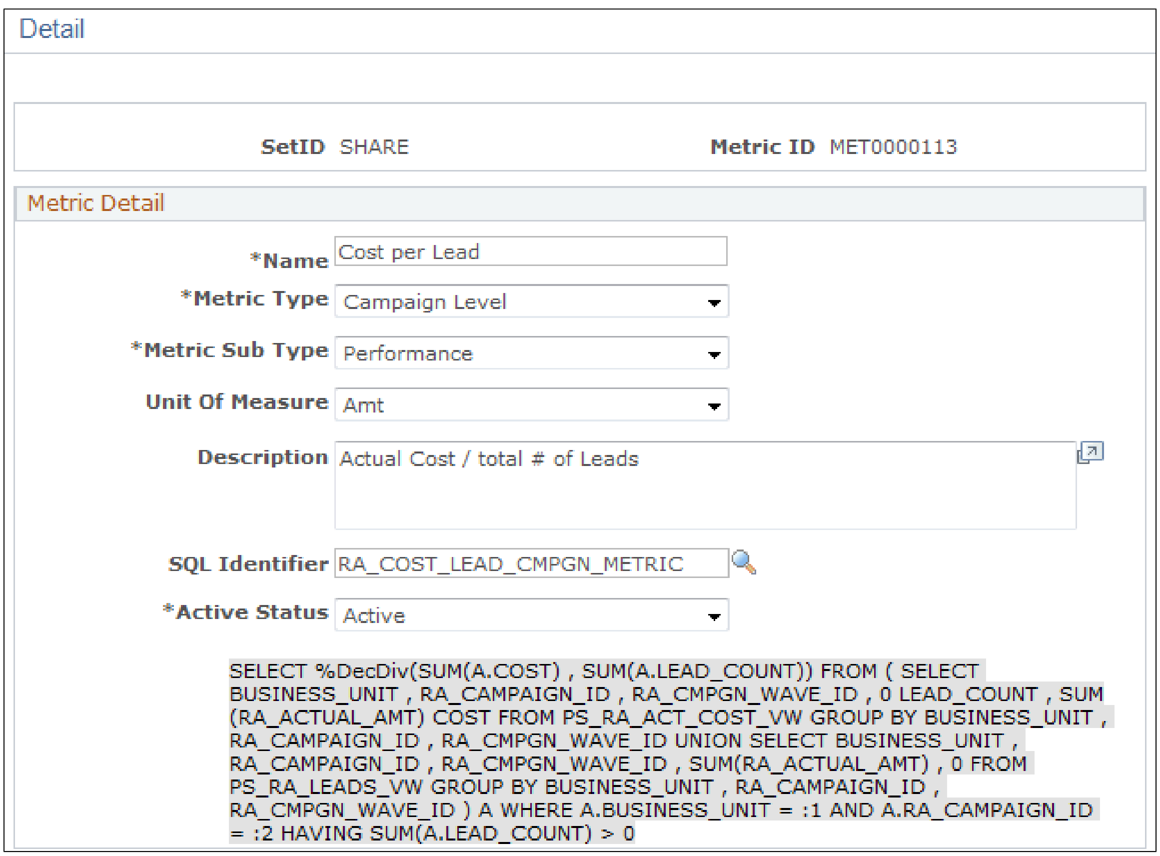
Performance Metric Detail Page

Use the Performance Metric Details page (RA_METRICS) to define and review metrics.

Navigation:

- To edit an existing metric, click the **Metric Name** link on the Metrics - Detail page.
- To create a new metric, click the **Add Metric** button on the Metric - Detail page.

This example illustrates the fields and controls on the Performance Metric Detail page.



Warning! Every metric has an associated SQL object that contains a SQL statement. The SQL statement governs the metric's calculations. SQL objects (and statements) are predefined for the metrics that Oracle delivers with your system.
To create custom metrics, you must first define the accompanying SQL objects and statements using PeopleSoft Application Designer. SQL objects designed to govern PeopleSoft Marketing metrics must have names that begin with the prefix RA_. Save such SQL objects in the PeopleTools dictionary of your PeopleSoft Customer Relationship Management database.

Field or Control	***Description***
SetID	Displays the setID within which the metric resides.
Metric ID	Displays the system-generated code that identifies the metric.
Name	Enter a descriptive name for the metric.
Metric Type	Select the type of object to be analyzed. Values are: • *Campaign Activity Level* • *Campaign Level* • *Event Level* • *Event Session Level* • *Rollup Level*
Metric Sub Type	Define the nature of the analysis. Values are: • *Performance* • *Financial*
SQL Identifier (Structured Query Language identifier)	Select the unique identifier of the SQL object that contains the SQL statement that governs the metric's calculations.
Active Status	Select the metric's status: *Active* or *Inactive.*
SQL Stmt Text (Structured Query Language statement text)	Displays the SQL statement that governs the metric's calculations.

Defining Cost Elements

This topic discusses how to define cost elements.

Pages Used to Define Cost Elements

Page Name	***Definition Name***	***Usage***
Costs - Types Page	RA_UD_COST_TYPE	Define cost types associated with campaigns.
Costs Page	RA_COST_METRICS	Define the costs that you associate with various campaign objects, including audiences and collateral.
Channel Cost Page	RA_CHANNEL_COST	Define default costs associated with a specific campaign channel.

Costs - Types Page

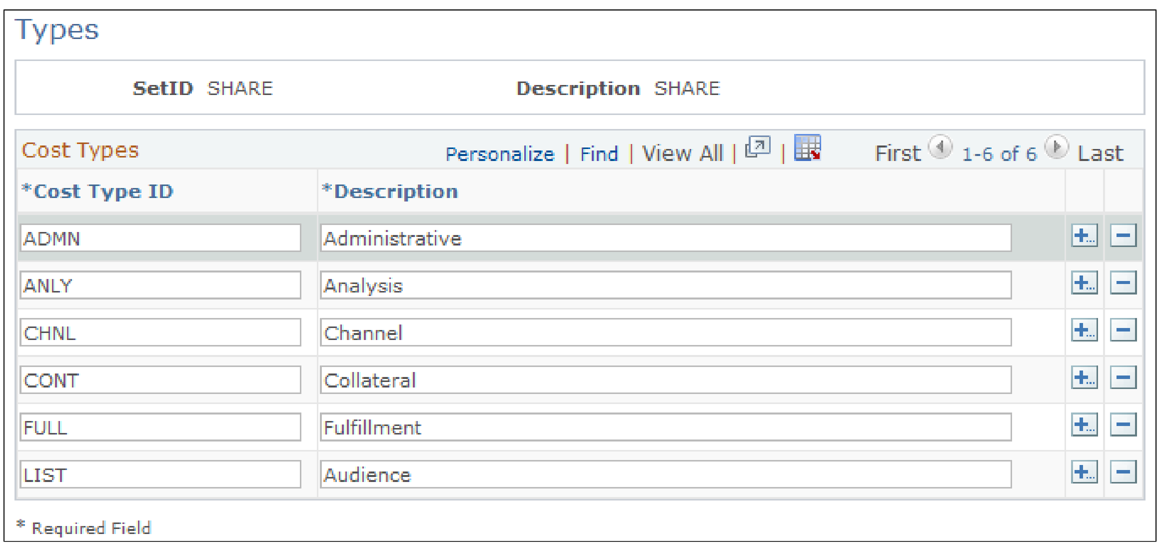
To define cost types, use the Costs - Types (RA_UD_COST_TYPE) component.

Use the Costs - Types page (RA_UD_COST_TYPE) to define cost types associated with campaigns.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Costs** > **Identify Cost Types**

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



Use cost type codes to categorize campaign costs.

Field or Control	***Description***
Cost Type ID	Enter a code that identifies the cost type.

Field or Control	*Description*
Description	Enter a description of the cost type.

Costs Page

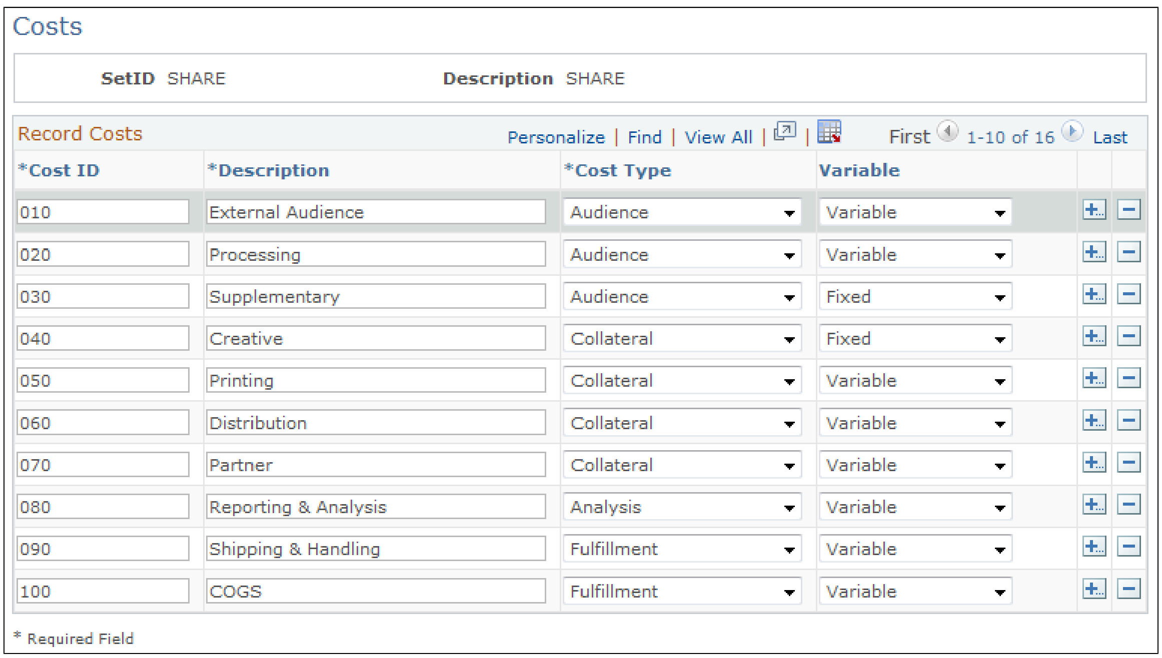
To define costs, use the Costs (RA_COST_METRICS) component.

Use the Costs page (RA_COST_METRICS) to define the costs that you associate with various campaign objects, including audiences and collateral.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Costs** > **Costs**

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



Cost ID codes associate a specific cost with a campaign, activity, collateral, or audience. Cost type codes describe a general category of expense, while cost ID codes more narrowly define it.

Field or Control	*Description*
Cost ID	Enter a code that identifies the cost. **Note:** Develop a cost ID scheme before you begin setting up your cost ID codes. A good scheme enables you to categorize costs and leaves room for additions when necessary.
Description	Enter a description of the cost.

Field or Control	***Description***
Cost Type	Select a cost type that reflects the broad category into which the cost falls.
Variable	Select whether the cost is variable or fixed. Select *Variable* to enable users to edit the **Unit Cost** field on either the Campaign Detail - Metrics page or the Campaign Detail - Activity Detail page. Select *Fixed* to prevent users from altering the **Unit Cost** field when you enter a value in the **Cost** field on either the Campaign Detail - Metrics page or the Campaign Detail - Activity Detail page.

Channel Cost Page

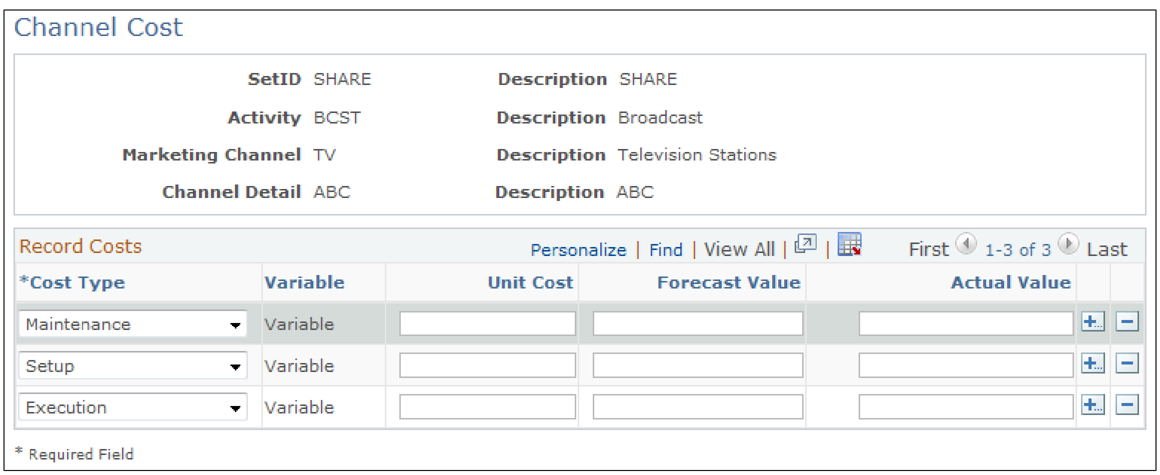
To define channel costs, use the Channel Cost (RA_CHANNEL_COST) component.

Use the Channel Cost page (RA_CHANNEL_COST) to define default costs associated with a specific campaign channel.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Costs** > **Channel Cost**

This example illustrates the fields and controls on the Channel Cost page.



Define channel costs (default cost values) for campaign channels that are used frequently. When the specific channel is associated with a campaign activity, you can eliminate or modify the default values. To evaluate activity costs, you must record actual expenses on the Campaign Detail - Activities page.

Field or Control	***Description***
Cost Type	Enter the code that identifies the category of expense to be measured.
Variable	When a cost ID is set up as a variable expense, an indicator appears in this check box.
Unit Cost	Displays the cost of a single unit of product (for example, a brochure has a unit cost of 1 USD). The total cost of purchasing brochures is determined by the quantity purchased multiplied by the unit cost.
Planned Cost	Enter the amount that you expect to pay for all units of the product or service to be measured (quantity multiplied by unit cost).
Actual Cost	Enter the amount that you actually pay for all units of the product or service. **Note:** Under most circumstances, you should leave this field blank because the information is entered on the Campaign Detail - Activities page.

Defining Audience Information

This topic discusses how to define audience information.

Pages Used to Define Audience Information

Page Name	***Definition Name***	***Usage***
Audience Setup Page	RA_LIST_CONFIG	Limit audience row count by configuring the maximum number of rows to appear per audience and to include in correspondence requests.
Saved Search Audience Setup Page	RA_CFGSRCH_DEFN	Set up saved search audiences.
Segment Group Page	RA_SEGMENT_GROUP	Set up segment groups.

Audience Setup Page

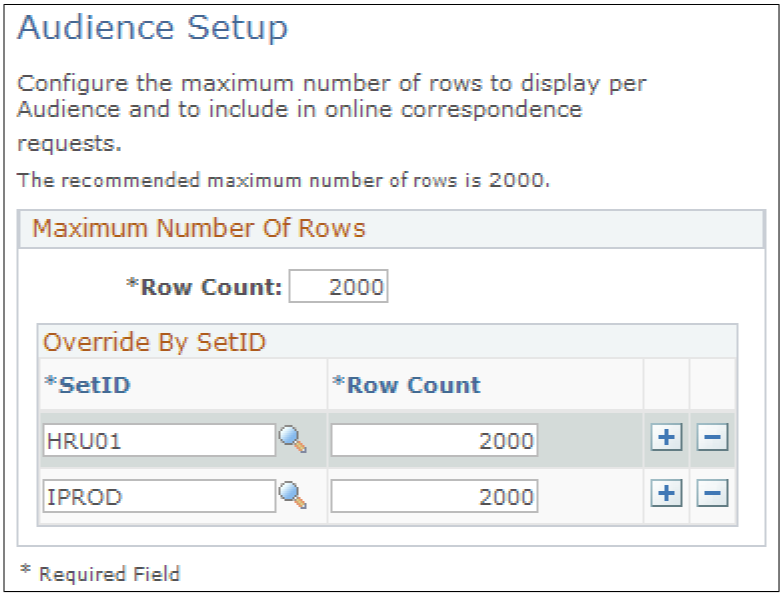
To limit audience row count, use the Audience Setup (RA_LIST_CONFIG) component.

Use the Audience Setup page (RA_LIST_CONFIG) to limit audience row count by configuring the maximum number of rows to appear per audience and to include in correspondence requests.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Audiences** > **Audience Setup**

This example illustrates the fields and controls on the Audience Setup page.



Enter a maximum number of rows to appear per audience. This setting also limits the number of messages generated to audience members through a correspondence request.

Row count does not limit the actual size of an audience, only the number of rows that appear on the screen. The recommended maximum row count is 2,000.

Saved Search Audience Setup Page

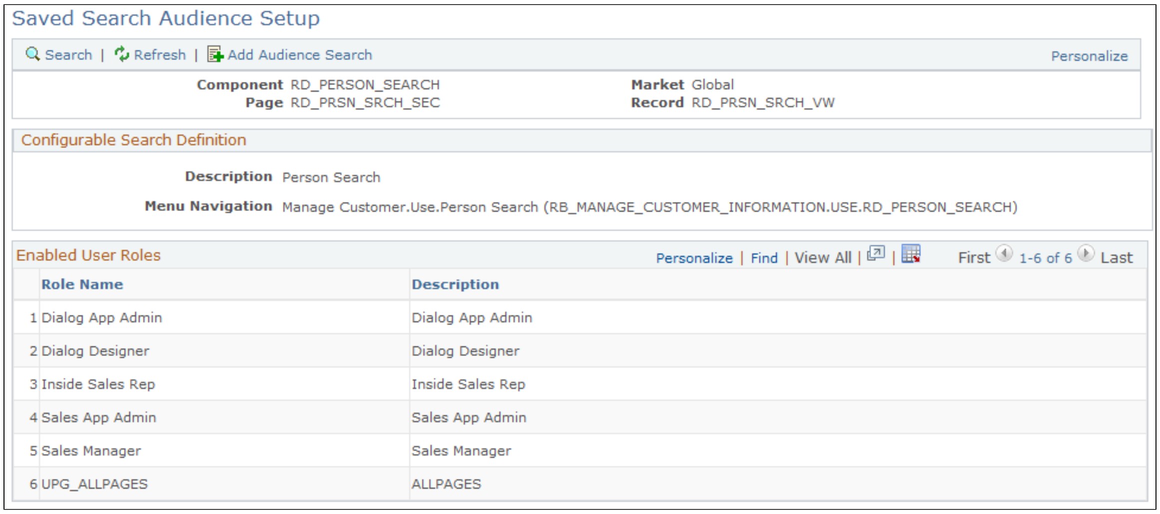
To set up saved search audiences, use the Saved Search Audience Setup (RA_CFGSRCH_DEFN) component.

Use the Saved Search Audience Setup page (RA_CFGSRCH_DEFN) to set up saved search audiences.

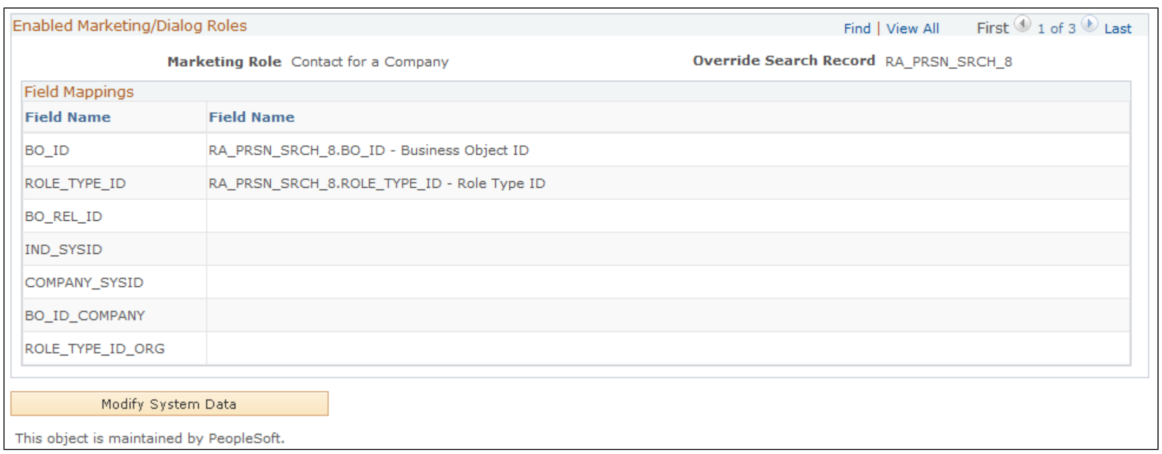
Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Audiences** > **Saved Search Audience Setup**

This is the first of two examples illustrating the fields and controls on the Saved Search Audience Setup.



This is the second of two examples illustrating the fields and controls on the Saved Search Audience Setup page.



Field or Control	***Description***
Component	Displays the configurable search definition component.
Market	Displays the configurable search definition market.
Page	Displays the configurable search definition page.
Record	Displays the configurable search definition search record.
Description	Enter a brief description of the search.
Menu Navigation	Enter the Menu.Bar.Item name to use for transfers to the configurable search page.

Field or Control	***Description***
Enabled User Roles	Displays the user roles that are allowed to create audiences from this configurable search page.
Enabled Marketing/Dialog Roles	Displays the Marketing/Dialog target individual roles (role/relationship) that can be extracted from the configurable search results to make up an audience list.
Override Search Record	(Optional) Select an alternate search record containing fields that are identical to the primary search record, plus any additional fields for mapping to a target type. This search record could be a view that provides additional constraints or joins to affect the search results for the audience.
Field Mappings	Displays mapping of configurable search results to audience results.

Segment Group Page

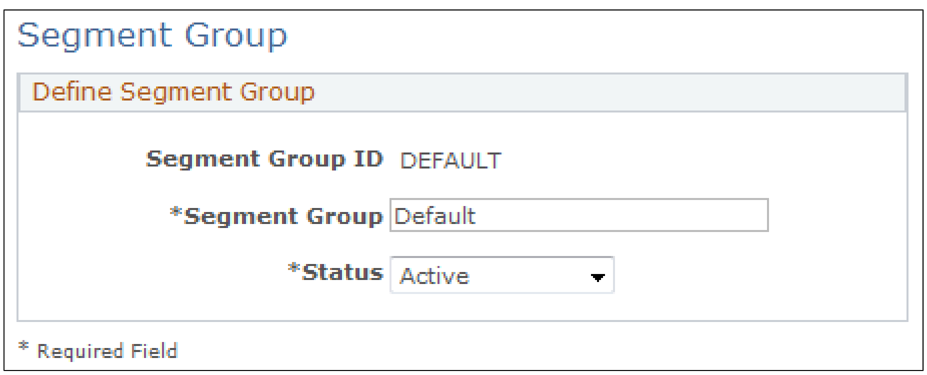
To set up segment groups, use the Segment Group (RA_SEGMENT_GROUP) component.

Use the Segment Group page (RA_SEGMENT_GROUP) to set up segment groups.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Audiences** > **Segment Group**

This example illustrates the fields and controls on the Segment Group page.



Field or Control	***Description***
Segment Group ID	Enter the unique identifier for the segment group. If you do not enter an identifier (leaving the default value of *NEXT*) then a group ID will be generated automatically.
Segment Group	Enter a name for the segment group.

Field or Control	***Description***
Status	Select the current status of the segment group: *Active* or *Inactive.*

Defining Task Tools

This topic provides an overview of tasks and discusses how to define task shells and task sets.

Pages Used to Define Task Tools

Page Name	***Definition Name***	***Usage***
Task Shell Page	RA_TASK_SHELL	Define task shells.
Task Sets Page	RA_TASK_GROUP	Define task sets.

Understanding Tasks

Tasks represent actions that must be performed. Within PeopleSoft Marketing, tasks are associated with campaigns, collateral, and offers, and are assigned to appropriate team members as a reminder to do a certain thing at a certain time. When a task is assigned to a campaign team member, a notification is added to the team's worklist when it is time for the team to perform the task.

Task shells enable you to define common tasks one time and reuse them whenever needed. Task sets enable you to combine several commonly used tasks into a group that you can reuse.

Task Shell Page

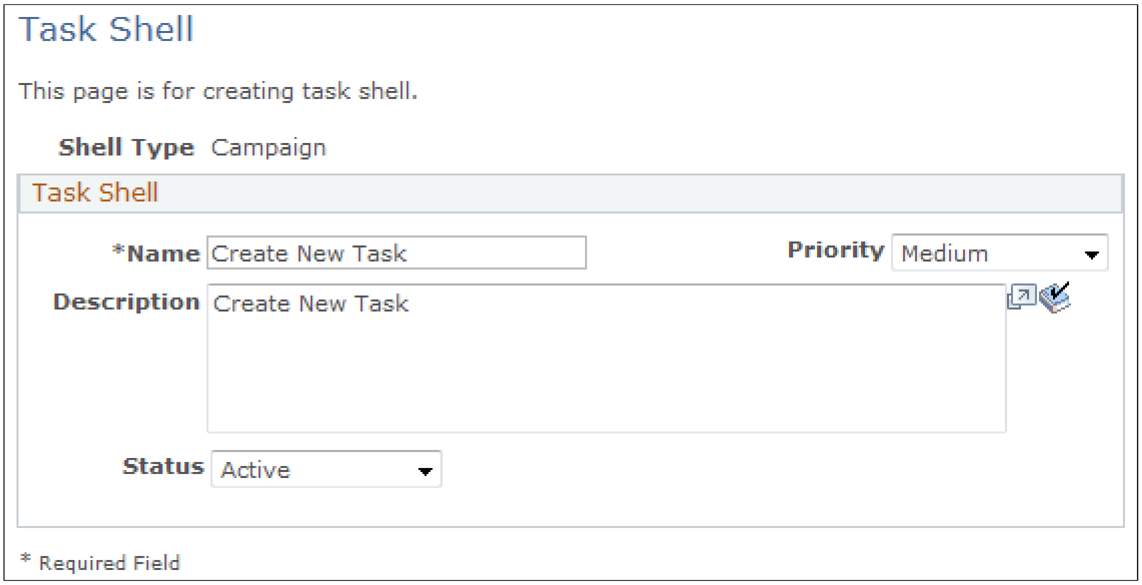
To define task shells, use the Task Shell (RA_TASK_SHELL) component.

Use the Task Shell page (RA_TASK_SHELL) to define task shells.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Task Shell** > **Task Shell**

This example illustrates the fields and controls on the Task Shell page.



On the Task Shell page, search for an existing task shell or add a new value. To add a new task shell, select a task shell type. Select *Campaign* to define a task shell associated with campaigns. Select *Content* to create a task shell associated with collateral. Click **Add** to access the Task Shell page, where you can define the task.

Field or Control	***Description***
Name	Enter a name for the task shell.
Description	Enter a description for the task shell.
Priority	Select a priority value for the task shell. The priority value indicates the urgency of the task shell for information purposes only. Options are *High, Medium,* and *Low.*
Status	Select a status for the task. Options are *Active* and *Inactive.*

Task Sets Page

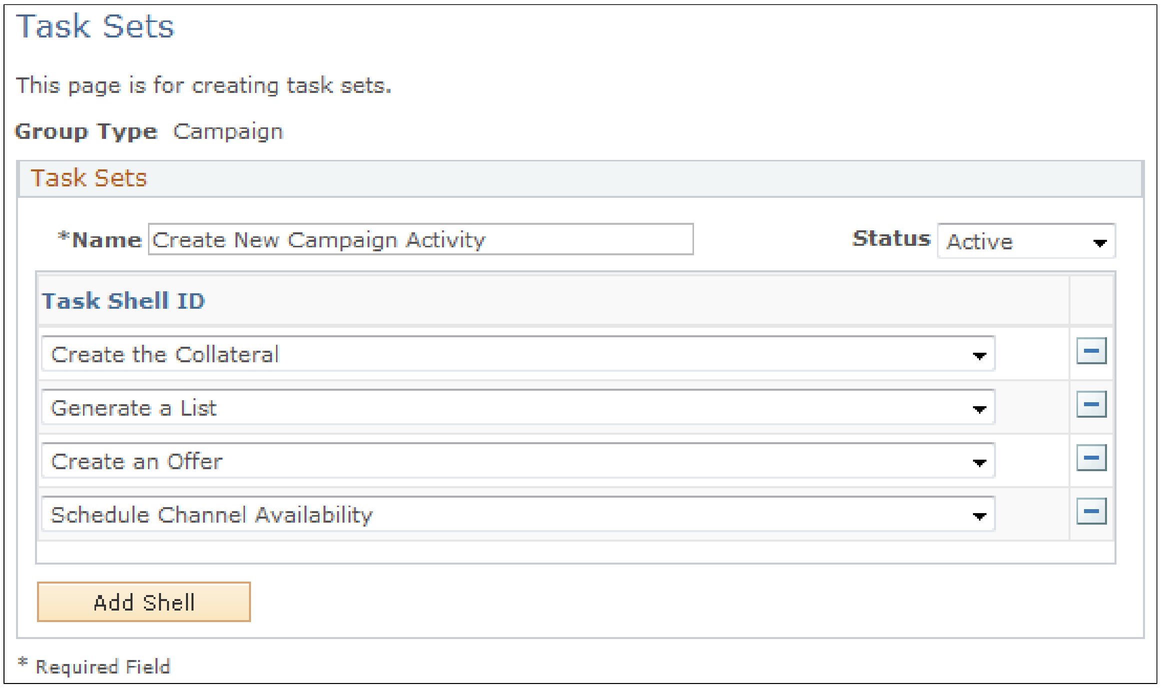
To define task sets, use the Task Sets (RA_TASK_GROUP) component.

Use the Task Sets page (RA_TASK_GROUP) to define task sets.

Navigation:

Set Up CRM > **Product Related** > **Marketing** > **Task Sets**

This example illustrates the fields and controls on the Task Sets page.



On the Task Sets search page, search for an existing task, set or add a new value. To add a new task set, select a task shell type. Select *Campaign* to define a task set associated with campaigns. Select *Content* to create a task set associated with collateral. Click **Add** to access the Task Sets page, where you can define the set.

Field or Control	***Description***
Name	Enter a name for the task set.
Task Shell ID	Select the name of a task shell that you want to include in the task set. Add and delete additional task shells as needed.

Chapter 5

Creating Campaign Collateral

Understanding Campaign Collateral

This section discusses:

- Collateral types and subtypes.
- Collateral statuses.

Campaign collateral (also sometimes called *content*) is all the material that you produce to support a campaign. It includes material destined for your target audience and others outside your organization, as well as material for internal use. Campaign collateral can take any form: radio commercials on audio cassette, glossy direct mail packets, text files, and so on.

Associate collateral with campaign activities to manage the production and dispersion of that collateral as part of your overall campaign. You can access actual collateral through PeopleSoft Marketing if that collateral is stored on your computer (for example, text and graphic files).

Examples of campaign collateral include:

- Press kits.
- Television commercials.
- Giveaway items.
- Event banners.
- Scripts for promotional presentations.
- Market research summaries.
- Web pages.

Collateral Types and Subtypes

Types and subtypes help to categorize your collateral. For organizational purposes, collateral types identify the types of collateral that you create. Collateral subtypes modify collateral types, making them more precise. Every collateral subtype belongs to a collateral type. For example, *Email* and *Letter* are subtypes of the type *Direct Marketing.* PeopleSoft Marketing is delivered with various collateral types and subtypes. You can define additional collateral types and subtypes on the Types and Subtypes setup pages.

The following collateral types and subtypes are delivered with your system:

Collateral Type	***Collateral Subtype***
Creative	Ad Creative
Creative	Image Suite
Creative	Poster
Deliverable	CD
Deliverable	Data Sheet
Deliverable	Executive Overview
Deliverable	General Overview
Deliverable	Success Story
Deliverable	Value Proposition
Deliverable	White Paper
Direct Marketing	Call Script
Direct Marketing	Direct Mail Piece
Direct Marketing	Email
Direct Marketing	Letter
Direct Marketing	Magazine Insert
Event	Demo
Event	Event Handouts
Event	Giveaways
Event	Scripted Presentation
Event	Signage

Collateral Type	***Collateral Subtype***
Event	Staging
Event	Video
Press/Analyst	Bullet
Press/Analyst	Press Release
Press/Analyst	Press/Analyst Kit
Publishing	Article
Publishing	Magazine
Publishing	Newsletter
Sales Tools	Competitive Sales Guide
Sales Tools	Discussion Guide
Sales Tools	Market Research
Sales Tools	Sales Tools
Sales Tools	Send Mail
Sales Tools	Training Presentation
Web	Landing Pad and Offer
Web	Web Page

Collateral Statuses

Collateral passes through a structured life cycle. At each stage in its life cycle, collateral has a *status.* Status changes must follow predefined *status rules.* You can use the status rules that are delivered with your system, or you can redefine status rules on the Status Rules page.

The following table shows collateral statuses:

Status	***Description***
New	Collateral has just been created or imported.
In Review	Collateral is being reviewed for approval.
Re-Work	Collateral was not approved for use in this campaign activity.
Planning	Collateral was approved for use in this campaign activity and is now in development.
Completed	Collateral is defined and ready for use.
Expired	Collateral is no longer used.

Managing Collateral

This topic lists common elements and discusses how to manage collateral.

Pages Used to Manage Collateral

Page Name	***Definition Name***	***Usage***
Manage Collateral Page	RA_CONTENT_GRD_PG	Add or edit collateral definition.
Manage Collateral - Collateral Details Page	RA_CONTENT_DETAIL	Define collateral.
Manage Collateral - Files Page	RA_CONTENT_ATCH	Associate files with collateral.
Manage Collateral - Task Page	RA_CONTENT_TASK	Associate tasks with collateral.
Manage Collateral - Costs Page	RA_CONTENT_COST	Enter the costs of creating collateral.
Manage Collateral - Notes Page	RA_CONTENT_NOTE	Write notes and attach them to collateral, view brief descriptions of your collateral notes, and access those notes.

Common Elements Used to Manage Collateral

Field or Control	***Description***
Collateral ID	The code that uniquely identifies the collateral.
SetID	The setID in which the collateral resides.

Manage Collateral Page

Use the Manage Collateral page (RA_CONTENT_GRD_PG) to add or edit collateral definition.

Navigation:

Marketing > **Manage Collateral**

The Manage Collateral page enables you to search for an existing collateral definition or add one. When you select an existing definition or add one, you are taken to the Manage Collateral - Collateral Details page.

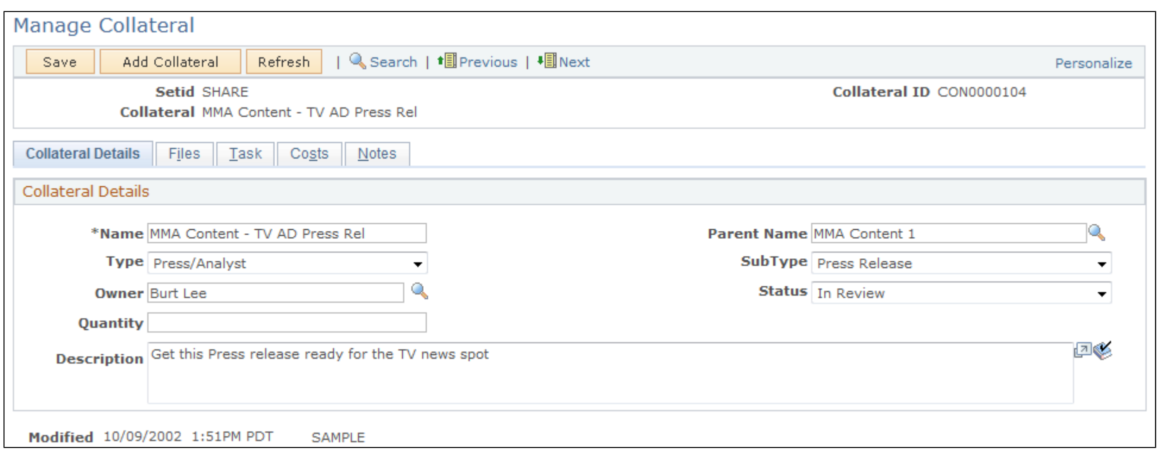
Manage Collateral - Collateral Details Page

Use the Manage Collateral - Collateral Details page (RA_CONTENT_DETAIL) to define collateral.

Navigation:

- To add a new collateral definition, click the **Add Collateral** button on the Manage Collateral page.
- To view or edit an existing collateral definition, use the search functionality on the Manage Collateral page. Click the **Collateral Name** to access the definition.

This example illustrates the fields and controls on the Manage Collateral - Collateral Details page.



Field or Control	***Description***
Name	Enter a brief descriptive name for the collateral.

Field or Control	***Description***
Parent Name	At times, two or more pieces of collateral are related to each other. For example, you might have an envelope printed to match a brochure that you're sending out. To make sure that the two go together, you create a parent and child relationship. If the collateral has a parent, select that parent here.
Description	(Optional) Enter a definition of the collateral.
Type	Select a collateral type from the available list. Collateral types are defined on the Type setup page.
SubType	Select a collateral subtype from the available list. Collateral subtypes are defined on the Sub Types setup page.
Owner	Select a collateral owner. The owner is the person responsible for the collateral. The collateral owner is the default assigned-by person for collateral tasks.
Status	Identify the collateral's position in its life cycle.
Quantity	Enter the quantity of the collateral to be produced.

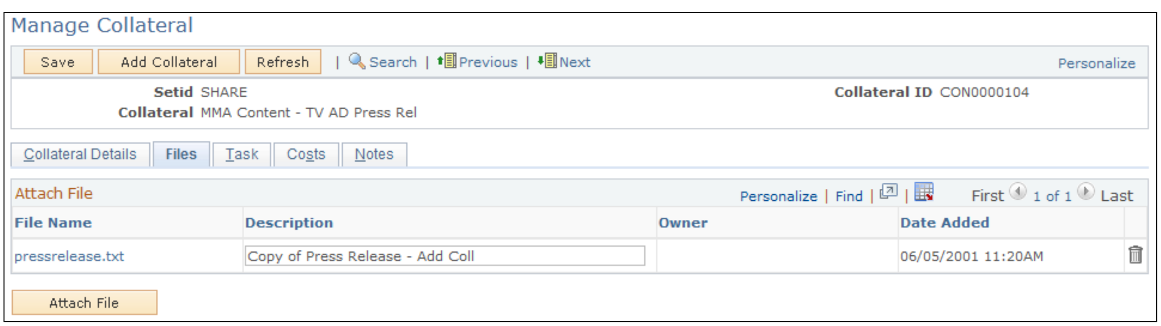
Manage Collateral - Files Page

Use the Manage Collateral - Files page (RA_CONTENT_ATCH) to associate files with collateral.

Navigation:

Marketing > **Manage Collateral** > **Files**

This example illustrates the fields and controls on the Manage Collateral - Files page.



The Files page displays summary information about collateral materials stored in your computer system. For example, you might store the text and graphics files that you use to create a brochure. These files are often not the finished collateral product, but are used in the creation of the final product.

Field or Control	***Description***
File Name	Displays the name of the file attached to the collateral.
Description	Enter an optional description of the file.
Owner	Displays the person who is responsible for the file attached to the collateral.
Date Added	Displays the date when the file was attached to the collateral.
Attach File	Click the **Attach File** button to upload a file.

Manage Collateral - Task Page

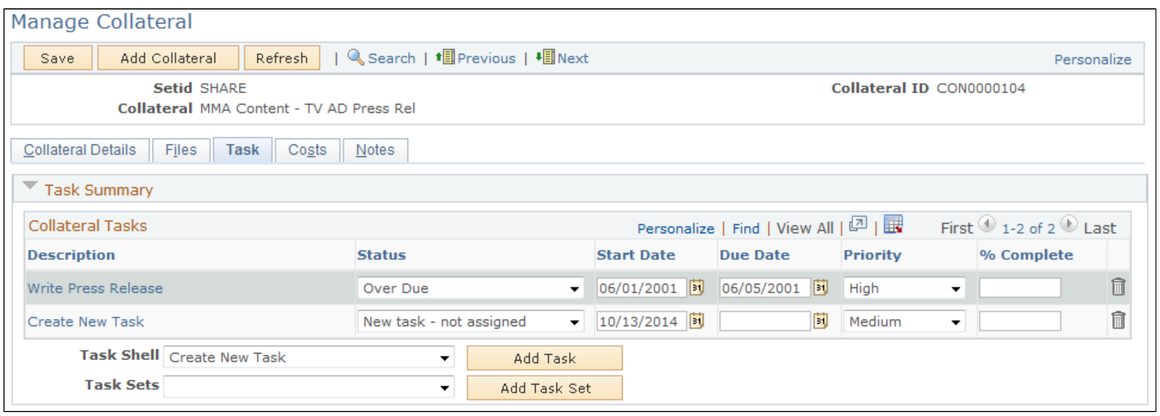
Use the Manage Collateral - Task page (RA_CONTENT_TASK) to associate tasks with collateral.

Navigation:

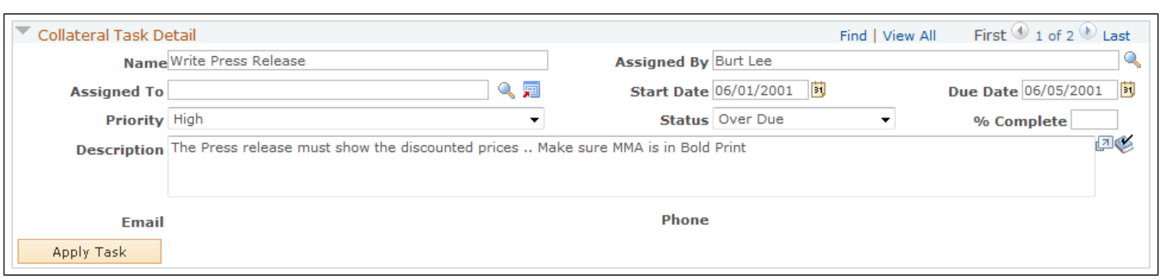
Marketing > **Manage Collateral** > **Tasks**

Select a task type and click **Add Task** to add a task, or click **Add Task Set** to add a task set.

This is the first of two examples illustrating the fields and controls on the Manage Collateral - Task page.



This is the second of two examples illustrating the fields and controls on the Manage Collateral - Task page.



The Task page displays summary information about tasks associated with the collateral definition and enables you to attach new tasks and task sets.

Field or Control	***Description***
Task Shell	Select a task shell from the available options.
Task Sets	Select a task set from the available options.
Add Task	Click to add a new task.
Add Task Set	Click to add a new task set.
Name	Displays the name of the task or task set
Assigned By	Displays the name of the user who assigned the task or task set.
Assigned To	Displays the name of the user to which the task has been assigned.
Start Date	Displays the date that the task is to begin.
Due Date	Displays the date that the task is scheduled to be completed.
Priority	Displays the relative urgency of the task.
Status	Displays the position of the task in its life cycle.
% Complete (percent complete)	Displays the portion of the task that you have completed.
Description	Displays the description of the task or task set.

See Defining Task Tools.

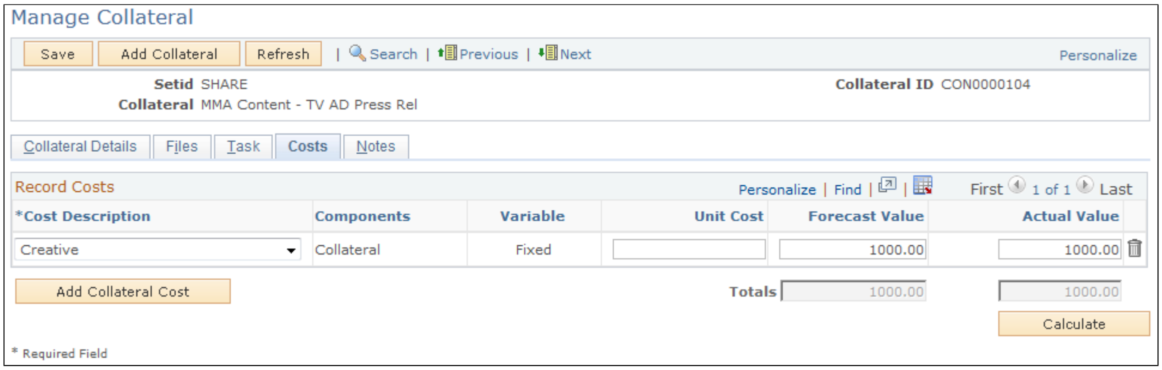
Manage Collateral - Costs Page

Use the Manage Collateral - Costs page (RA_CONTENT_COST) to enter the costs of creating collateral.

Navigation:

Marketing > **Manage Collateral** > **Costs**

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



Field or Control	*Description*
Cost Description	Select the description of the cost that you want to associate with the collateral. Costs are defined on the Cost setup page.
Components	Displays the description of the cost type associated with the selected cost.
Variable	Displays whether the cost of the collateral is defined as variable or fixed.
Unit Cost	Enter the cost of a single unit of the collateral.
Forecast Value	Enter the expected cost of all the collateral. This is the number of pieces multiplied by the unit cost.
Actual Value	Enter the actual cost of all the collateral. This is the final cost after adjustments are made for quantity purchased or changes in unit costs.

Manage Collateral - Notes Page

Use the Manage Collateral - Notes page (RA_CONTENT_NOTE) to write notes and attach them to collateral, view brief descriptions of your collateral notes, and access those notes.

Navigation:

Marketing > **Manage Collateral** > **Notes**

Click the Summary of Notes link on the Collateral - Notes page.

See “Understanding Notes and Attachments” (Application Fundamentals).

Chapter 6

Using Offers

Understanding Offers

A PeopleSoft Marketing *offer* represents the way in which a particular product or service being offered as part of a marketing campaign activity. In other words, the offer is not the product or service itself, but some sort of discount or product giveaway that is designed to encourage customers to buy. Each activity can have only one offer. Price Rules associated with the offer define the discount or giveaway structure.

Offer details are carried through the entire transaction chain. Offers can also be presented to customers either associated with a marketing activity or as a standalone offer, , and their reactions to the offers can be tracked. Third-party optimization tools can be used to make decisions as to which offers are most appropriate for a given customer. Other than marketing activities, customers can be presented with offers from:

- Case.
- Order Capture.
- 360-Degree View.

See PeopleSoft Call Center Applications.

See PeopleSoft Order Capture Applications.

Offer Statuses

Offers pass through structured life cycles. At each stage in its life cycle, an offer has a *status.* Status changes must follow predefined *status rules.* You can use the status rules that are delivered with your system, or you can redefine status rules on the Status Rules page.

Status	***Description***
New	Offer has just been created or imported.
In Review	Offer is being reviewed for approval.
Declined	Offer was not approved for use in this campaign activity.
Planning	Offer was approved for use in this campaign activity and is now in development.

Status	*Description*
Completed	Offer is defined and ready for use.
Archive	Offer has been set to be no longer usable.

Understanding Offer Presentation

When presenting offers, the system requests recommendations from third-party optimization engines that determine the best choice for a customer based on various criteria.

Offers can be presented to customers in two ways:

- *Passive* offers require the user to click on an icon in order to view the offer.
- *Active* offers pop up automatically on an agent's screen, their content based on which offers are the most appropriate for the given customer.

Both active and passive offers take the user to the same page—the only difference is how they are invoked.

Configuring the System to Allow Offer Management

Before you can use Offer Management, you must set up the third-party optimization engine and set up the appropriate AAF policies to activate passive and active offers.

Delivered with the application is an abstract wrapper class named *OfferRecEngineAbstract.* This class contains an abstract definition of the methods that Offer Management uses to communicate with the third-party optimization engine. Also included is the *OfferRecEngineProd* class, which extends the abstract wrapper class and contains implementations of actual communication with the third-party optimization engine. Because every customer's actual implementation is different, the methods in this class are mostly empty—you must supply the necessary code to integrate with your chosen third-party engine.

You can find additional information about the wrapper classes by searching for the extension reference ROF_REC_ENGINE at **Setup CRM** > **Common Definitions** > **Component Configuration** > **Application Class Extensions.**

See Defining Offer Options.

Passive Offers

In the case of passive offers, the user requests offer recommendations from the third-party optimization engine by clicking on a predefined button on a page. In the delivered applications, this button appears as either a "spinning dollar sign" on the page's toolbar (360-Degree View and Case) or in the middle of the page (Order Capture).

The button is available when the following conditions are met:

- Configuration information is set to indicate that the customer is running a third-party optimization engine, or

- The customer or contact on line to a call center has been targeted for a campaign-driven marketing promotion (this applies to passive offers presented from Order Capture only).
- The appropriate AAF policy has been set, as shown in the following table:

Toolbar	***AAF Action***
360-Degree View	Display Offer Icon in 360
Case	Upsell Configuration on Case

Order Capture does not require an AAF policy to display the icon on the Order Capture page.

Note: The spinning dollar sign button is also available on the customer's 360-Degree View.
In order to perform retrieval of offer recommendations, additional AAF policies must be set up. For 360-Degree View, and Case, a policy must be set up that uses the action "Display Offer Alerts." The number of offer recommendations can be configured in the policy. For Order Capture, a policy must be set up that uses the action "Display Offers and Promotions." On this policy, you can configure the number of offer recommendations as well as the option to use the third-party optimization engine to retrieve offer recommendations, retrieve campaign-driven marketing promotion, or use both.

After the agent clicks the button, the system returns recommendations (the number of which the user can configure) based on conditions set up in the AAF policy. The recommendations are returned in the form of a series of offer IDs, the details of which are displayed along with applicable campaign-driven promotions for which the customer has been targeted. From this page, the agent can:

- View products and pricing rules associated with the offer.
- Initiate a branch script that is associated with the offer for the purposes of scripted selling.
- Select products associated with an offer.
- Accept an offer.
- Reject an offer.
- Register interest in an offer.

Active Offers

In the case of active offers, the system uses an AAF action to request offer recommendations from the third-party optimization engine automatically at multiple trigger points throughout the application. Additional AAF actions can be configured to invoke the request action from preconfigured trigger points whenever the policy conditions are met. For the 360-Degree View, Case, and Order Capture, you must set up a policy that uses the action "Display Offer Alerts."

As in the passive offer, the system returns a user-configurable number of recommendations, in the form of offer IDs, based on conditions set up in the AAF policy. The AAF action initiates a pop-up window to display the details of the recommended offers. The pop-up window contains links that allow the user to view further details for each offer. Each link opens a subsequent page, from which the user can:

- View products and pricing rules associated with the offer.

- Initiate a branch script that is associated with the offer for the purposes of scripted selling.
- Select products associated with an offer.
- Accept an offer.
- Reject an offer.
- Register interest in an offer.

Delivered AAF Actions

The following table shows the AAF actions that are delivered with Offers.

AAF Action	***Description***
Initiate Offer Rec Section	Initiates a new section with the third-party optimization engine for the given customer or contact.
Send Offer Session Data Update	Sends data updates to the third-party engine for the customer actions that might change during the call.
Display Offer Alerts	Requests a list of offer recommendations from the third-party optimization engine and displays the list in a pop-up window.
Display Offer Icon in 360	Displays the spinning dollar sign icon on the 360–Degree View toolbar.
Display Offers and Promotions	Generates a list of offer recommendations from the third-party optimization engine, from offers associated with marketing campaigns, or both.
Upsell Configuration on Case	Displays the spinning dollar sign icon on the Case toolbar. This action can be configured to use offers as the type of upsell this icon will represent. The offer configurable option is only be available if a third-party optimization engine is installed.

You will need to create AAF policies to use these actions.

See “Understanding AAF” (Automation and Configuration Tools).

Offer Logging and Post-Presentation Flow

When a customer registers a reaction to an offer presented via the third-party system (for example, Accept or Decline), this reaction is logged. The following occurs:

- The reaction (including customer ID, contact ID, offer ID, disposition of the offer, and the timestamp) is logged in the Offer History table and in an Offer History node in the 360-Degree View that shows offer history by disposition.
- A message is sent to the third-party system to indicate the customer's disposition of the offer.

If the customer accepts the offer and there are related products associated with it, the system navigates to the Order Capture Screen, where the following occurs:

- An order line is created for the product selected from the offer.
- Pricing rules associated with the offer are applied to the order.
- Order Capture tracks the offer by storing the Offer ID.

If an order is generated from an offer relating to a case, corresponding order details are tracked back to the originating case.

See PeopleSoft Call Center Applications.

Creating Offers

In this topic, we discuss how to define and manage offers.

Pages Used to Create Offers

Page Name	***Definition Name***	***Usage***
Manage Offers Page	RA_OFFER_DETAIL1	Define attributes that make up a campaign offer.
Create Price Rule - Select Products and Discount Page	RA_PRICESET_PG	Specify the type of discount structure that applies to the offer and the products offered.
Create Price Rules - Define Price Breaks Page	RA_PRICE_BREAK	Define the discount structure of the offer.
Create Price Rule - Review and Save Page	RA_PRICE_BREAK3	Confirm price rule selections before saving the definition.
Offers - Note Page	RA_OFFER_NOTE	Write notes and attach them to offers.

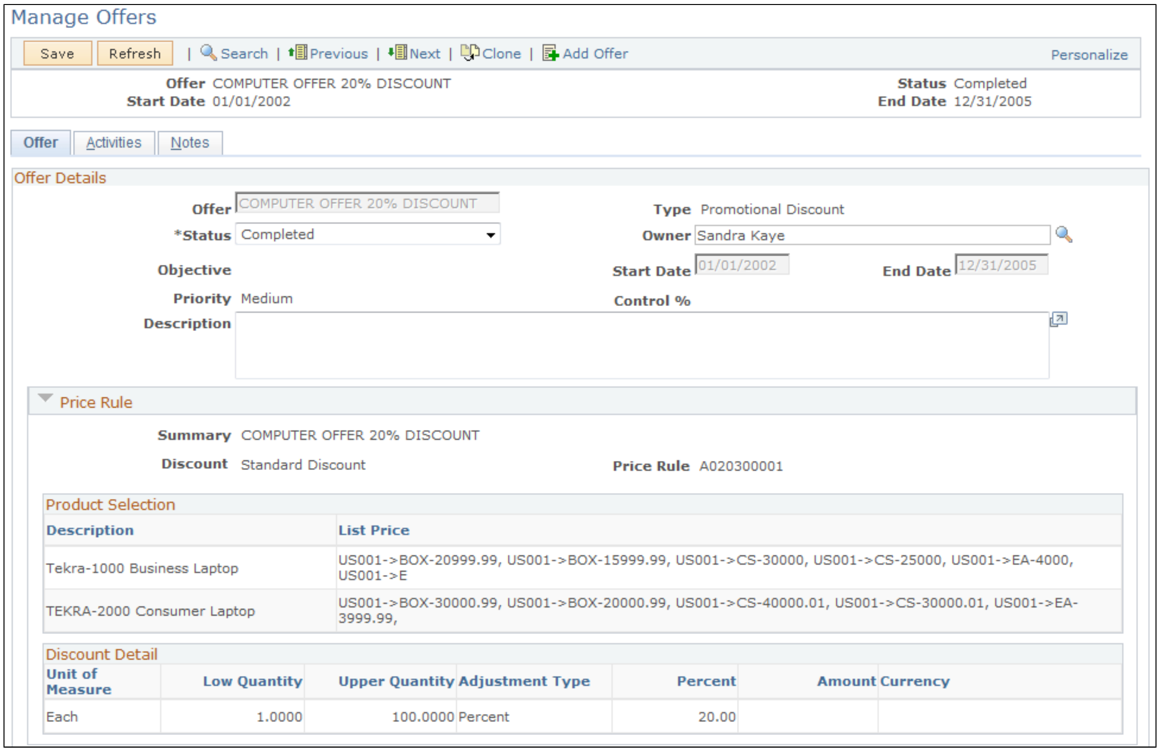
Manage Offers Page

Use the Manage Offers page (RA_OFFER_DETAIL1) to define attributes that make up a campaign offer.

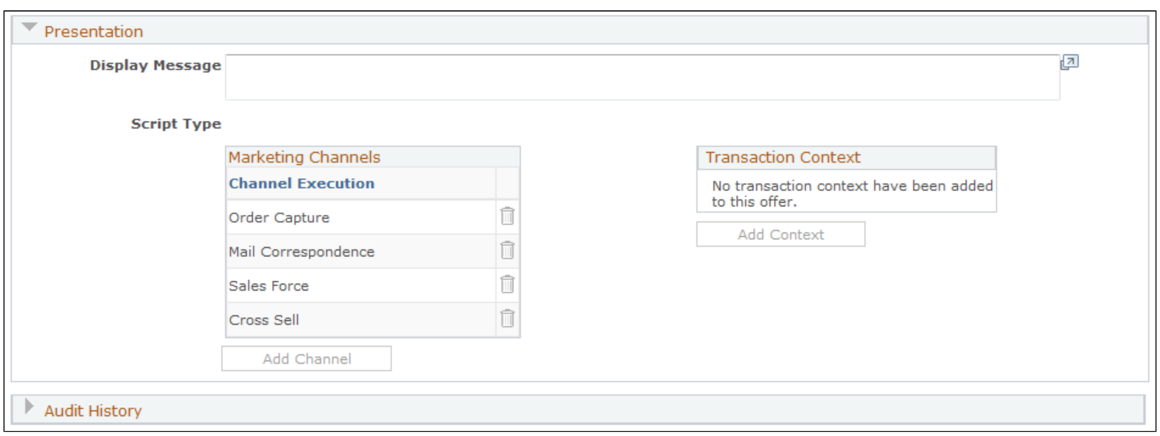
Navigation:

Marketing > Manage Offers > Offer

This is the first of two examples illustrating the fields and controls on the Manage Offers page.



This is the second of two examples illustrating the fields and controls on the Manage Offers page.



When creating a new offer definition, the Manage Offers page enables you to enter basic information about the offer. Once the offer is created and saved, the page enables you to edit basic information and displays summary information about the product selection and discount detail.

Field or Control	***Description***
Offer	Enter a name to uniquely identify the offer.

Field or Control	***Description***
Type	Displays whether the offer is a Promotional Discount or a Communication offer. You specified the type on the Manage Offers search page. You cannot add the offer unless a type is selected.
Status	Enter the position of the offer in its life cycle
Owner	Enter or select the name of the person designated as the offer owner. By default, this field is filled in with the name of the currently signed-on user.
Objective	Select an objective for the offer.
Priority	Select a priority for the offer.
Control %	Specify a control percentage for the offer. This value is informational for the PeopleSoft Marketing system, but will be used by third-party tools to create "control group" scenarios (for example, to specify to the tool that it should only present the offer to 5% of the eligible customers).
Start Date and End Date	Enter the start and end dates that the offer is valid.
Internal Description	Enter a description of the offer that will only be viewed by internal personnel—the offer recipient will not see this description.
Price Rule	*(Promotional Discount offer only)* Displays information about the products and price rule for the offer.
Discount Detail	*(Promotional Discount offer only)* Displays information about the discount associated with the offer.
Update Products and Price Rule	*(Promotional Discount offer only)* Click to access the Create Price Rule wizard, where you can add or update products and price rules. **Note:** You cannot access the Create Price Rule wizard when the offer's Status is Complete or Archived.
Display Message	Enter a description of the offer that will be visible to the offer recipient.
Script Type	Select *Branch Script* as the script type.

Field or Control	*Description*
Script Name	Select the name of the branch script you specified. This field appears when you select a Script Type.
Marketing Channels	Select a channel from the available list. The available options vary depending on the offer type. For Promotional Discount, the choices are Order Capture, Mail Correspondence, Sales Force, and Cross Sell. For Communication, the choices are Mail Correspondence and Cross Sell.
Add Channels	Click to specify marketing channels to add to the Marketing Channels list.
Add All Channels	Click to add all available marketing channels to the list.
Transaction Context	Select an AAF Context to associate with the offer. This information indicates the contexts from which the offer can be recommended, and is used for tracking that point of contact (for example, the offer is presented from the Call Center). You can associate multiple AAF Contexts with an offer. The allowable contexts are: • Case. • Order Capture CI. • 360-Degree View.
Add Context	Click this button to add an AAF Context to the list.
Add All Context	Click to add all the available AAF Contexts to the list.

Create Price Rule - Select Products and Discount Page

Use the Create Price Rule - Select products and discount page (RA_PRICESET_PG) to specify the type of discount structure that applies to the offer and the products offered.

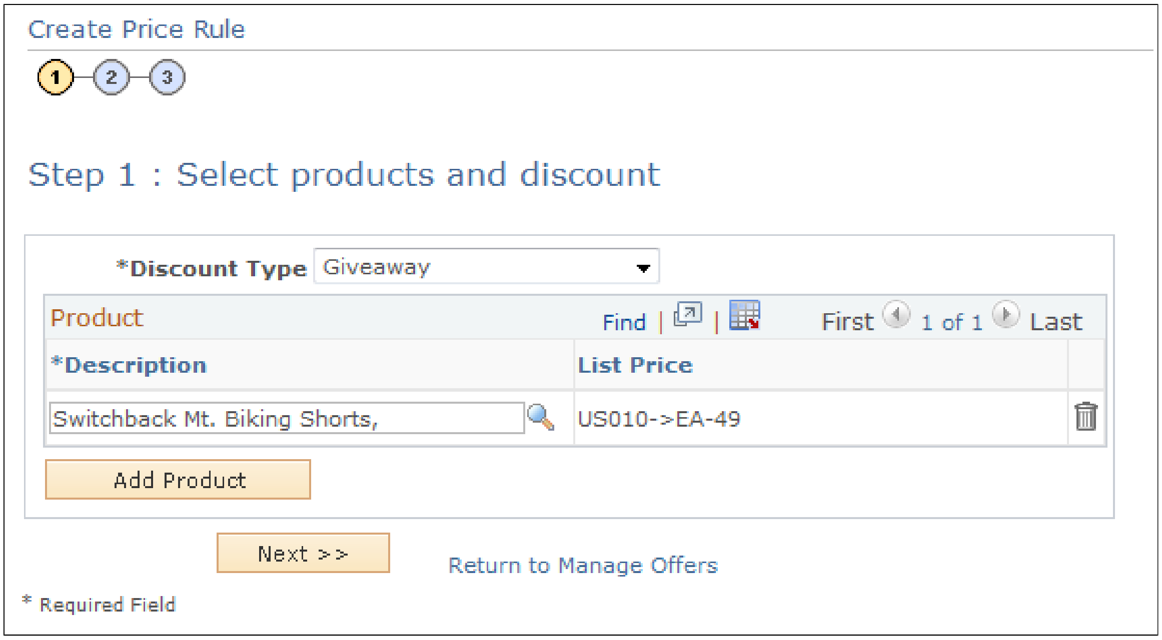
A price rule is the specification for price adjustments (discounts), applied to standard prices. You must associate one price rule with every offer.

Price rule definitions can be changed up to the point that the offer status is set to *Completed* and the offer is saved.

Navigation:

- Click the **Add Price Rule** link on the Offer page when creating a new offer.
- Click the **Update products and price rule** link on the Offer page when editing an existing offer.

This example illustrates the fields and controls on the Create Price Rule - Select products and discount page.



Field or Control	***Description***
Discount Type	Select the discount type that you want to associate with the offer. Marketing Discount Type options are: *Giveaway:* Giveaway discounts take the form of in-kind giveaways, rather than cash breaks. That is, when a customer receives a giveaway discount, you give that customer some free product or a service and charge full price for the actual purchase. *Standard Discount:* Standard discounts are flat discounts. Customers who purchase qualified amounts receive the same discount regardless of how many units of a product of service they buy. *Tiered Pricing:* Tiered discounts vary based on the number of units of a product or service purchased. For example, you might give a five percent discount when a customer buys one to nine units, ten percent discount if they buy ten to twenty-four, and a fifteen percent discount if they buy twenty-five or more. *No Discount*: Allows creation of offers with products that will not be presented with a discount. If the product selected has no discount, all customers will pay full price for the product regardless of the quantity ordered.

Note: Price Rules defined in PeopleSoft Marketing are used to define prices applied to products when orders are placed in response to a marketing offer. Orders are fulfilled through Order Capture processing which utilizes price rules not only from Marketing, but from Order Pricing as well. The discount types of Standard Discount and Tiered Pricing that are available in Marketing are not available in Order Pricing. Price rules created under marketing that use the Standard and Tiered discount types fall under the Cascading discount type in Order Pricing.

Field or Control	***Description***
Product ID	Select the ID of the offered product.
Description	Displays the description of the selected product.
List Price	Displays the Inventory Business Unit and List Price of the selected product. You establish list prices using the Products Price page of the Price component under the Products CRM menu.

Related Links

Create Price Rule - Select Products and Discount Page

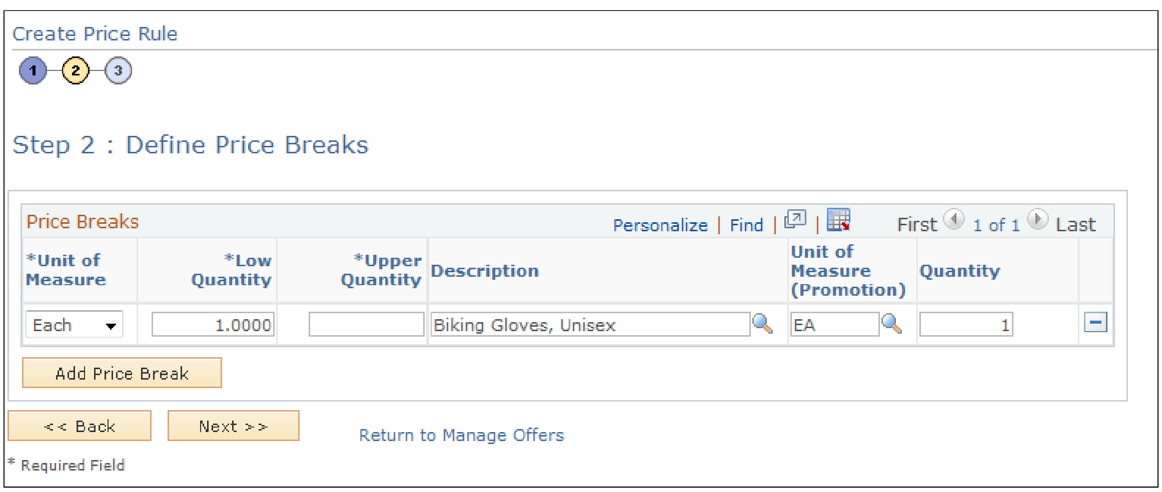
Create Price Rules - Define Price Breaks Page

Use the Create Price Rule - Define Price Breaks page (RA_PRICE_BREAK) to define the discount structure of the offer.

Navigation:

Click the **Next** button on the Create Price Rule - Select products and discount page.

This example illustrates the fields and controls on the Create Price Rules - Define Price Breaks page.



The discount type that you select in Step 1 determines the fields needed for Step 2. The following fields apply to all discount types except No Discount.

Note: This page does not appear when the discount type selected is *No Discount.*

Field or Control	*Description*
Unit of Measure	Select the unit of measure you want to use for the offered product.
Low Quantity	Enter the minimum quantity of product to qualify for the promotional discount.
Upper Quantity	Enter the maximum quantity of product to qualify for the promotional discount. **Note:** Enter a maximum quantity high enough that no order will exceed it.

The following fields apply to Standard and Tiered Pricing discount types.

Field or Control	*Description*
Adjustment Type	Select the type of discount that you want to apply to the product price. Type options are: *Amount:* Select the amount option to deduct a fixed currency amount from the final product price. *Percent:* Select the percent option to calculate and deduct a percent amount from the final product price.
Percent	Enter a percent amount that you want deducted from the final product price when you select a Percent type.
Amount	Enter the currency amount that you want deducted from the final product price when you select an Amount type.
Currency Code	Select the currency code appropriate to your market when you select an Amount type. A currency code selection does not apply to the Percent type.

The following fields apply only to Giveaway discount types.

Field or Control	*Description*
Description	Select the Promotional Product ID number of the product you are giving away as the promotional item.
Unit of Measure (Promotion)	Select the unit of measure used for the promotional product.

Field or Control	Description
Quantity	Enter the quantity of promotional products to be given with the amount of product purchase. The **Quantity** amount corresponds to the **Unit of Measure (promo prod)** selection. For example, if you want to give one box of T-shirts with the purchase of ten or more cases of fishing line, select *Box* as the **Unit of Measure (promo prod)** and *1* as the **Quantity.**

Create Price Rule - Review and Save Page

Use the Create Price Rule - Review and Save page (RA_PRICE_BREAK3) to confirm price rule selections before saving the definition.

Navigation:

Click the **Next** button on the Create Price Rule - Define Price Breaks page.

This example illustrates the fields and controls on the Create Price Rule - Review and Save page.

Confirm your completed price rule definition and check for reasonableness. Check to make sure that the correct products are specified and that price adjustments are appropriate to the unit of measure.

Price rules created within PeopleSoft Marketing are available for use by PeopleSoft Order Capture processes only when the status of the offer is set to complete and saved.

Note: The Price Breaks grid does not appear if the *No Discount* discount type was selected.

Offers - Note Page

Use the Offers - Note page (RA_OFFER_NOTE) to write notes and attach them to offers.

Navigation:

Marketing > **Manage Offers** > **Note**

Use the Offers - Note page to attach any notes related to the offer.

See “Understanding Notes and Attachments” (Application Fundamentals).

Presenting Offers

This topic describes how to present an offer that has already been created.

Page Used to Present Offers

Page Name	*Definition Name*	*Usage*
Present Offer Page	ROF_OFFERPRESENT	View recommended offers and their details, and select one to present to a customer.

Present Offer Page

Use the Present Offer page (ROF_OFFERPRESENT) to view recommended offers and their details, and select one to present to a customer.

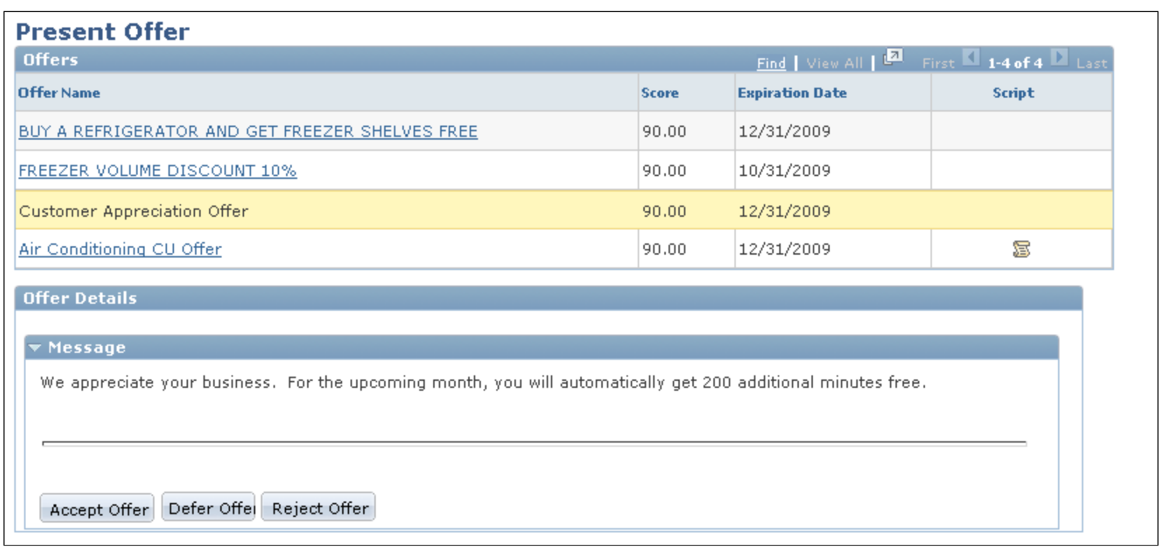
Navigation:

Click the spinning dollar sign icon in the 360–Degree View, Case, or other page where Offer Management has been set up.

or

Click an offer in a pop-up window that displays a list of offers.

This example illustrates the fields and controls on the Present Offer page.



Field or Control	***Description***
Recommended Offer	Displays a list of recommended offers (either selected through marketing promotions or optimized by the third-party optimization system based on customer information).
Score	This value indicates the "fit" of the offer to the customer. The score is assigned to the offer by the third-party optimization system, based on the likelihood that a given customer will accept the offer. Offers associated with campaign-driven promotions will show a score of zero. If duplicate offers exist (from a targeted promotion and suggestion by the third-party system), only the offer with the higher score (usually the third-party system suggestion) is shown.
Offer Details	The content of this section will vary depending on the type of offer selected. Some available offer types include: • Product offers. • Communications offers. • Promotional discount offers (including giveaways).

Chapter 7

Using Audiences

Understanding Audiences

This section discusses:

- Audiences
- Segments
- Audience statuses
- Audience sources
- Audience types
- Using audiences with the CRM/Student Administration integration

Audiences

An *audience* is a specific group of people to whom you target a marketing campaign. Use PeopleSoft Marketing to create and manage audiences for all marketing campaigns including online marketing.

Every marketing campaign requires one or more target audiences. These target audiences can be current customers drawn from your own database, unknown prospects from a rented list, or respondents to a banner ad on a website. However, before you can specify a target audience for a campaign, you must first define the audience.

An audience can serve multiple purposes in a marketing campaign. First and foremost, an audience is the list of contacts that you want to reach with your campaign. However, that primary audience can be segmented into smaller groups that enable you to test the effectiveness of different campaign strategies. You can also export your audience to a third-party vendor who will append data not normally gathered by your company.

Before you define an audience, consider the following questions:

- Are the intended recipients all known to you?

  That is, are the intended recipients already in your PeopleSoft CRM database (an internal audience), or are they unknown to you and will they be contacted by an outside vendor (an external audience)?

- How will you contact the recipients?

  For example, do you plan to contact them using PeopleSoft Online Marketing, or Sales applications, or will you use a third-party direct-mail vendor?

- Do you want the audience to reflect changes to the database each time that you generate the audience (a dynamic audience), or will the audience remain the same (a fixed audience)?

- Will you use the audience to test your campaign before you take it live or will you try different strategies (a test audience)?

Considering these questions in advance will help you define your audience.

Note: Because you can use audiences with multiple campaigns, you should carefully consider changes to an existing audience so that you don't adversely affect another campaign. For this reason, PeopleSoft Marketing enables you to clone audiences.

Segments

A segment is a group of customers defined by some selection criteria. Segments are considered a type of audience—you define their selection as you do audiences, and you can use them interchangeably with dynamic audiences in PeopleSoft Marketing, Online Marketing, and the enterprise.

You can arrange segments hierarchically by defining parent-child relationships between segments. Each segment can have multiple children, but only one parent. Child segments always inherit the selection criteria of their parent segment, and by default they also inherit the parent's owner attributes.

Segments and segment hierarchies are associated with segment groups, which is simply a way to arrange the segments and hierarchies. Child segments are always associated with the same segment group as their parents.

Audience Statuses

Audiences and segments pass through structured life cycles. Each stage of the life cycle is called a status. Status changes must follow predefined status rules that are delivered with your system.

Note: Audience status rules are not the same as campaign and activity status rules. You cannot redefine audience status rules on the Status Rules page.

An audience can pass through the following statuses:

Audience Status	***Description***
In Design	Audience is new and selection criteria is not yet defined.
Designed	At least some audience selection criteria are defined.
Scheduled	Audience is scheduled to be generated at a definite future date and time.
Processing	Audience generation is currently in process.
Generated	Audience generation process finished successfully.
Approved	Audience is approved for use in live campaigns.

Audience Status	***Description***
Committed	Audience is in use by one or more campaign activities and cannot be modified except to add correspondence management requests or to manually change the status of the audience to *Archived.*
Archived	Audience is inactivated and cannot be newly associated with any campaign. Audience status can be changed only to *Archived* when the audience is not in use by a live campaign or by an online dialog.

Audience Sources

PeopleSoft Marketing audiences are defined most broadly as either *internal* (known) or *external* (unknown). You generate Internal audiences by selecting records from your PeopleSoft CRM database. These records may be existing customers, or a list imported from an outside source. In either case, the audience is drawn from the database.

External audiences are drawn from an external source such as a mailing list produced by a third party vendor that you import into your system. Another example would be a group of respondents to a weblink promo, such as a website banner ad. While it is possible that certain individuals drawn from these external sources may happen to exist already in your own database, an external audience is originally defined and drawn from an external source rather than directly and exclusively from individual records in your own database

The audience source describes whether the audience is external or internal and, if internal, how it was created.

The following table lists and describes the nine sources of audiences:

Audience Source	***Description***
External using Online Marketing	An *External using Online Marketing* audience is made up of contacts previously unknown (in most cases) to your PeopleSoft Marketing system. For example, placing a banner ad on a website exposes your offer to an audience, but you have no idea who will see it and respond. External audiences are intended to be used in conjunction with Online Marketing dialog popup web pages where the audience is unknown.
Internal Using Audience Builder	The audience is generated from contacts currently in the PeopleSoft Marketing database. Audience Builder enables users who do not know SQL to define a simplified selection query.

Audience Source	**Description**
Internal Using Combine Audiences	Two or more existing audiences are combined into a new, larger audience. All existing audiences included in a combined audience definition must be drawn from contacts currently in the PeopleSoft Marketing system.
Internal Using Import	A contact list is imported into your PeopleSoft CRM database, from which you generate an internal (known) audience.
Internal Using PSQuery	This query uses PSQuery functionality to create an audience from contacts currently in the PeopleSoft Marketing system. Using PSQuery requires a knowledge of SQL.
Internal Using Saved Search	This search is based on the search criteria entered on a Configurable Search page. You must first enable audience creation using the Configurable Search page. An enabled search page enables you to save the search as an audience. **Note:** This option doesn't appear when you are creating a new audience. You can view or update this audience type on the Audience Detail page, but you cannot create it.
Control Group	Control groups help you gauge the effectiveness of your campaign by isolating a small segment of your target audience. By comparing sales results of the larger audience to those of the control group, you can determine the actual influence of your campaign. How control group members are drawn from each included audience is controlled by a combination of the control group audience size and source audience percentages. **Note:** This option doesn't appear when you are creating a new audience. You can view or update this audience type on the Audience Detail page, but you cannot create it.
Test Audience	You create a test audience by selecting a subset of a generated audience. Use test audiences to try different offers on different subsets of your audience. These test audiences can be created as a percentage of the original audience count, or users can specify the total number of records for each test audience. Test audience selection is random. All test audiences are fixed audiences. **Note:** You can create test audiences only for audiences in the status of Generated, Approved, or Committed.
Segment	A segment is similar to an audience built using Audience Builder. You can create segments in a hierarchical structure in which a child segment automatically inherits the roles and selection criteria of its parent segment.

For more information, refer to the *PeopleTools: Query* documentation.

Audience Types

Audiences are one of two types, either Fixed or Dynamic.

A *fixed* audience is an internal audience that does not change, such as the list of people who attended a conference. A *dynamic* audience is an internal audience that may change over time. An example of a dynamic target audience is a newsletter campaign that periodically sends out customized email messages to subscribers, pointing them to specific web pages. As new subscribers sign on, you want the target audience to include those people.

Note: Segments are always dynamic.
The following table describes the audience types:

Audience Type	***Description***
Fixed	The audience query runs only at the time the audience is created—results are static after the audience is generated. New contacts meeting the audience criteria are not added to the list unless you manually regenerate the audience, or clone it and generate the cloned audience. Audience members can be added manually to a fixed audience.
Dynamic	Audience query criteria is stored and run each time that an action associated with the audience runs. Each time that you use the audience, new contacts that meet the criteria are included in the results, and old contacts that no longer meet the criteria are omitted from the results.

Creating and Managing Audiences

This topic lists the common elements and discusses how to create and manage audiences.

Pages Used to Create and Manage Audiences

Page Name	***Definition Name***	***Usage***
Audiences Page	RA_LIST_SUMMARY	Create and update audiences.
Audience - Audience Detail Page	RA_LIST_MAIN	Define and update audiences.
Create a Target Audience - Select Roles Page	RA_LB_STEP_1	Select basic profiles to include in audience selection.
Create a Target Audience - Define Selection Criteria Page	RA_LB_STEP_2	Select profile fields and values to define audience selection criteria.

Page Name	***Definition Name***	***Usage***
Create a Target Audience - Review and Save Page	RA_LB_STEP_3	Confirm contents of the audience selection criteria.
Create Test Audiences Page	RA_TEST_AUDIENCE	Create one or more test audiences for an audience in generated, approved, or committed status.
Segment Detail Page	RA_LIST_SEG_MAIN	Define and update segments.
Define Segment Group Page	RA_SEGMENT_GROUP	Define segment groups, which are used to group segments and segment hierarchies.
Audience - Activities Page	RA_LIST_WAVES	View activities associated with audiences.
Plans Page	RA_LIST_PLANS	Define plans for audiences and segments. This page is visible only if the audience or segment has been published.
Audience - Costs Page	RA_LIST_COST	Associate costs with audiences.
Audience - Notes Page	RA_LIST_NOTE	View brief descriptions of your audience notes and access those notes.
Audience - Result List Page	RA_LIST_RECS	View, add, or eliminate records from a generated audience.
Audiences - Correspondence Page	RA_LIST_CM	View summary information about audience correspondence and initiate new correspondence.
Audience - Team Page	RA_LIST_TEAM	Associate team members with an audience. You can associate individual workers or entire roles as team members—in the case of roles, each individual worker who has that role is considered a team member. Team membership can be used to control or limit who can access this audience or segment. The audience or segment's owner, as defined on the Audience Detail or Segment Detail page, is always automatically added as a team member when the audience is saved.

Common Elements Used to Create and Manage Audiences

Field or Control	*Description*
Count	Displays the number of records (people) in the audience. **Note:** The count for dynamic audiences and segments represents the number of records in the audience at the time that it was last generated. The audience count is not updated when it is used as part of a PeopleSoft Online Marketing Dialog. For example, at the time of approval, a dynamic audience might contain 500 records. Two weeks later, when the audience is used by PeopleSoft Online Marketing, the audience might grow to 550 records.
Owner	The person who is responsible for an audience.
Status	The position of an audience in its life cycle. Values are *Approved, Archived, Committed, Designed, Generated, In Design, Processing,* and *Scheduled.*

Audiences Page

Use the Audiences page (RA_LIST_SUMMARY) to create and update audiences.

Navigation:

Marketing > **Manage Audiences**

From the Audiences page, you can create a new audience or update an existing audience. Click **Create New Audience** to add a new audience. Click the audience name to update an existing audience.

You create audiences using profiles. For a complete explanation of profiles, refer to the PeopleSoft Application Fundamentals documentation.

Note: The CDM Basic tables must be populated before you can generate audiences. Refer to the business object management documentation for more information about CDM Basic tables.

See Application Fundamentals.

See Business Object Management.

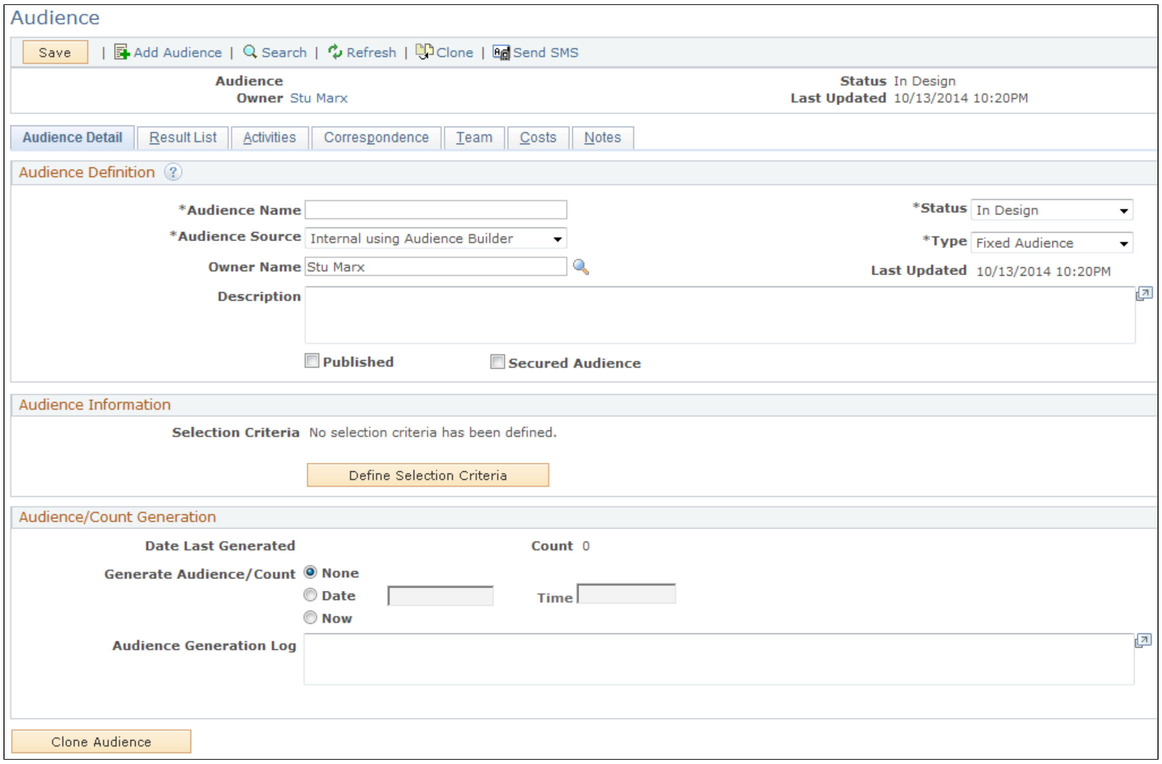
Audience - Audience Detail Page

Use the Audience - Audience Detail page (RA_LIST_MAIN) to define and update audiences.

Navigation:

- Click an audience name on the Audiences page to open an existing audience.
- Click the **Create New Audience** button on the Audiences page to define a new audience.

This example illustrates the fields and controls on the Audience - Audience Detail page.



The full Audience Detail page includes up to three regions, depending on variables such as audience type, source, and status. Possible regions are a header, an Audience/Count Generation region, and an Audience Information region. Fields may be available for selection (or input) or display-only depending on several variables.

Audience Definition

Field or Control	***Description***
Audience Name	Enter a descriptive name for the audience. This field is display-only after the audience is saved.

Field or Control	*Description*
Audience Source	Indicates from where an audience is drawn from and how it was selected. Values are *Control Group,* *External using Online Marketing,* *Internal using Audience Builder,* *Internal using Combine Audiences,* *Internal using Import, Internal Using PSQuery, Test Audience,* and *Internal using Saved Search.* **Note:** You cannot change the source type of an audience after you have created it. **Note:** The values *Control Group, Test Audience,* and *Internal using Saved Search* are not available when you define a new audience. These types of audience are created through other means, but you can view or update them when the audience has been created.
Published	Select to indicate that you want the audience or segment to be visible and available to users outside the CRM Marketing application, such as the AAF Library.
Secured Audience	Click to limit access of the corresponding audience information only to authorized users. If Marketing Center Security is enabled at the installation level, the system restricts audience information to users who are members of the marketing centers with which the audience is associated on the Team page. See Audience - Team Page.

Generating an Audience Using Audience Builder

The system displays the **Query Information** region only when you select the source *Internal Using PSQuery.*

Generating an Internal Audience Using Combined Audiences

The system displays the **Audience Information** region only when you select the source, *Internal Using Audience Builder.*

Field or Control	*Description*
Selection Criteria	Displays text describing the selection criteria that was created with audience builder.

Field or Control	Description
Define Selection Criteria	Click this button to open the Audience Builder. The Create a Target Audience - Select Roles page appears.

Note: When combining audiences, the system checks for duplicate members. Audience members are assumed to be duplicates when they have the same BO ID and role. If one audience contains an active auto-added member and the second audience contains a manually added duplicate member, the manually added member is the one added to the new combined audience.

Importing an Audience

Creating an imported audience involves defining an audience shell within PeopleSoft Marketing, then importing audience data into the CDM using the CDM Data Import process. The CDM Data Import process populates the audience table. After you create an audience, you can attach it to an activity, select records, deduplicate (remove duplicate members), or anything else that you can do with any other audience.

See "Understanding the Data Import Application Engine Process (RBIMPORT)" (Business Object Management).

Generating an Audience Using PeopleSoft Query

The system displays the **Query Information** region only when you select the source *Internal Using PSQuery.*

Users with a thorough knowledge of SQL and the underlying table structures and joins can use PeopleSoft Query Manager to select an audience. Using PSQuery enables you to create complex queries beyond the capabilities of Audience Builder. For example, using PSQuery, you can incorporate information related to customer purchases by linking data from order tables.

Note: Audience Builder does not support explicit ordering in the query. If the query has a sort order, the sort is automatically discarded.

To be used for audience generation, a query must:

- Be defined as type *User Query* and *Public.*
- Not contain any user prompts.
- Include the Basics table (BO_BASIC_IND) in the main Select clause, the main Select clause of any unions, and the corresponding From clauses.

Note: You cannot change the source type of an audience after you have created it.

Field or Control	*Description*
Query Name	Select the query that was created using PeopleSoft Query Manager.
Modified Query SQL	The SQL code is copied from the selected query, modified slightly by the system (some additional criteria is added to ensure that only contacts and individual consumers are returned in the results) and displayed here. The copied code is saved with the audience and is used in the audience generation process. If the underlying PSQuery is changed, you must update the saved SQL code for the changes to take effect. **Note:** You cannot change the displayed code. It is read-only.
Query Manager	Click to access the PeopleSoft Query Manger.

See *PeopleTools: Query*

Audience/Count Generation

Field or Control	*Description*
Date Last Generated	Displays the date and time when the audience was last generated successfully.
Generate Audience/Count	Select when you want the audience to be generated. Values are: *None*: Select if you are creating an audience definition to use at an unknown future date and you do not want to generate the definition at this time. *Date* and *Time*: Select to specify a date and time for the audience to be generated. *Now*: Select to generate the audience as soon as you save the changes.
Audience Generation Log	Displays information about generated audiences. For each effort to generate an audience, the log includes the date and time, the outcome of the effort, and the number of records (people) placed on the audience.

Cloning an Audience

Field or Control	*Description*
Clone Audience	Click to create a duplicate of the selected existing audience. You can also launch the process using the **Clone Audience** button on the tool bar. The cloned audience inherits the selection criteria of the original audience. The status of the cloned audience is automatically set to *In Design,* regardless of the status of the source audience. The cloned audience must pass through the regular status stages including generation. For fixed audiences, manually added members from the original audience are copied to the new audience. After saving the new audience, you can choose to generate the audience. Duplicate members are checked upon generation. After generation, the result list is refreshed with auto-added and manually entered members.

Create a Target Audience - Select Roles Page

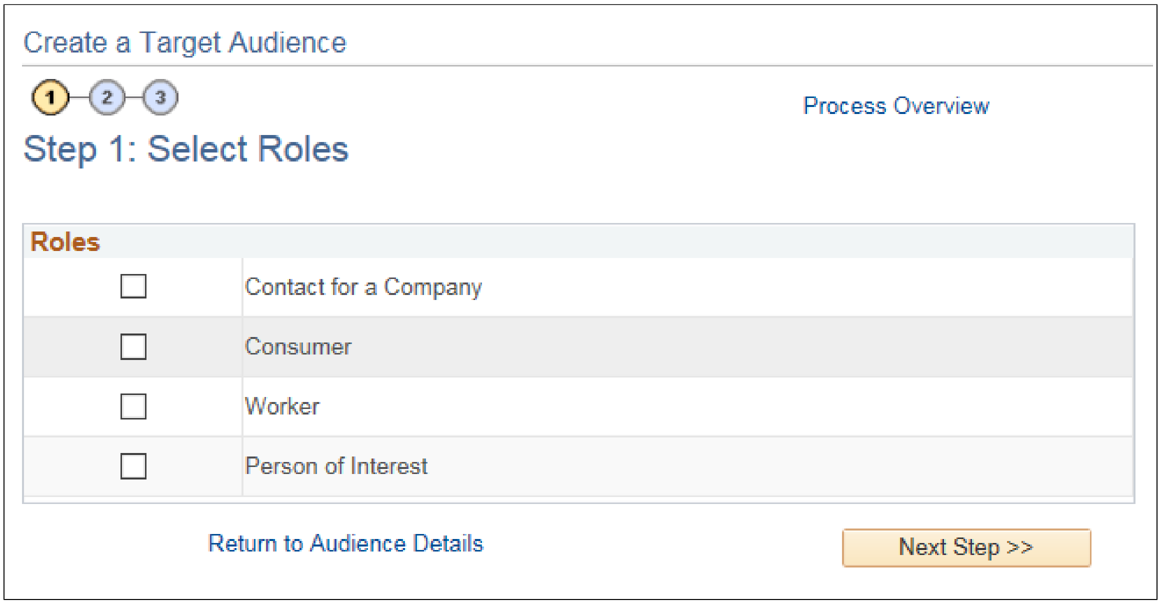
Use the Create a Target Audience - Select Roles page (RA_LB_STEP_1) to select basic profiles to include in audience selection.

Note: You must set up the CDM basic tables before you can build audiences.

Navigation:

Click the **Define Selection Criteria** button on the Audience Details page.

This example illustrates the fields and controls on the Create a Target Audience - Select Roles page.



Audience Builder enables users with no knowledge of SQL to create simplified yet powerful selection queries. Use the three-step Audience Builder Wizard to define the selection criteria and generate the audience.

Field or Control	***Description***
Roles	Select the check box that corresponds to the person represented in the PeopleSoft CRM CDM (Customer Data Model) as a *Contact for a Company* (a representative of a company), a *Consumer,* a *Worker* (an employee of a company), or a *Person of Interest.* A person can appear as both, or even appear as a contact multiple times, if that person represents more than one company. You must select at least one check box, but can select more than one to include all eligible records.

See Business Object Management.

Create a Target Audience - Define Selection Criteria Page

Use the Create a Target Audience - Define Selection Criteria page (RA_LB_STEP_2) to select profile fields and values to define audience selection criteria.

Navigation:

Click the **Next Step** button on the Create a Target Audience - Select Roles page.

This example illustrates the fields and controls on the Create a Target Audience - Define Selection Criteria page.

Filter the final results of your audience by defining selection criteria. Audience Builder offers both a basic and advanced mode.

Basic Mode Audience Builder limits you to *And* or *Or* connectors between condition clauses and automatically inserts implied parenthetical expressions when *Or* is used. Conditions within the parentheses are linked as if they are one condition. That is, each individual condition must be met for the combined (parenthetical) condition to be met. Because the parentheses are applied based on simple rules, you need to carefully consider the expected results of your query.

Advanced Mode Audience Builder enables users with an understanding of queries to create more sophisticated criteria by defining their own parenthetical expressions. These parenthetical expressions can be used to create nested selection criteria. In addition, the advanced mode enables you to use a *With* connector to achieve correlated subqueries when using a Many Rows profile.

The *With* connector is similar to an *And* connector, but has particular application when more than one row of data exists for a single contact. For example, suppose that you have a contact with multiple credit cards and you define the following criteria:

And/Or	***Profile Field***	***Operator***	***Value***
	Individuals.CreditCards. CreditCardCompany	has at least one	VISA
And	Individuals.CreditCards. ExpirationDate	has any less than	10/28/2002

As long as the contact has at least one VISA credit card, and any one of the cards (whether VISA or not) has an expiration date before November 28, 2002, a selection is returned. On the other hand, the following definition will return a selection only when the contact has at least one VISA card with an expiration date before November 28, 2006:

And/Or	***Profile Field***	***Operator***	***Value***
	Individuals.CreditCards. CreditCardCompany	has at least one	VISA

And/Or	*Profile Field*	*Operator*	*Value*
With	Individuals.CreditCards. ExpirationDate	less than	10/28/2006

Field or Control	*Description*
Profile Field	Select the profile fields that contain the data that you will use for your selection criteria. Fields from any activated profile that fall under the role or roles selected are available. Refer to the PeopleSoft Business Object Management documentation for more information about how profiles are defined. You can add additional fields to further narrow your selection criteria. For profiles under the Individual folder, you can search on keywords within the Individuals profiles (for example, you could search on “Academic” and find all the profiles under Individuals with “Academic” in their names.
Operator	Specify the criteria operator.
Value	Enter the criteria value. If a prompt table is associated with the profile field, the **Value** field will contain a lookup. Otherwise, you can enter free-form text. For audiences, the lookup will contain only approved or committed internal published audiences. For segments, it will contain approved or committed published segments.
And/Or	Select an operator to connect condition clauses. Condition clauses linked by the *And* connector return a selection only when *all* linked conditions are met. Condition clauses linked by the *Or* connector return a selection when *any* of the linked conditions are met. **Note:** A *With* connector is available for use in advanced mode with a Many Row profile type.

Available operator choices depend on the type of profile and profile field combination. Only operators appropriate to the particular combination will appear. The following table provides a complete list of all available operators, the type of profiles with which the operators can be used, and an explanation of what is included in each selection:

Available Operator	*Profile Type*	*What is Included*
is empty	One Row	Includes any record that has no data in the selected field.

Available Operator	***Profile Type***	***What is Included***
is not empty	One Row	Includes any record in which data is in the selected field.
is equal to	One Row	Includes any record in which the data in the selected field is equal to the specified value.
is not equal to	One Row	Includes any record for which the data in the selected field is not equal to the specified value.
is less than	One Row	Includes any record in which the data in the selected field is less than the specified value.
is no more than	One Row	Includes any record in which the data in the selected field is less than or equal to the specified value.
is at least	One Row	Includes any record in which the data in the selected field is equal to or greater than the specified value.
is more than	One Row	Includes any record in which the data in the selected field is greater than the specified value.
contains	One Row	Includes any record in which the character or string data in the selected field contains the specified character or string value. **Note:** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user. **Note:** This operator is available only in advanced mode.

Available Operator	*Profile Type*	*What is Included*
not contains	One Row	Includes any record in which the character or string data in the selected field does not contain the specified character or string value. **Note:** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user. **Note:** This operator is available only in advanced mode.
starts with	One Row	Includes any record in which the character or string data in the selected field starts with the specified character or string value. For example, to select all records in which the contact's last name begins with *A,* specify the value *A*. **Note:** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.
not starts with	One Row	Includes any record in which the character or string data in the selected field does not start with the specified character or string value. For example, to include all records except those in which the contact's last name begins with *A,* specify the value *A*. **Note:** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.
ends with	One Row	Includes any record in which the character or string data in the selected field ends with the specified character or string value. **Note:** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user. **Note:** This operator is available only in advanced mode.

Available Operator	***Profile Type***	***What is Included***
not ends with	One Row	Includes any record in which the character or string data in the selected field does not end with the specified character or string value. **Note:** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user. **Note:** This operator is available only in advanced mode.
has at least one	One Row w/Choose Many attribute, Many Row	Includes any individual having at least one associated record in which the data in the selected field is equal to the specified value.
has all	One Row w/Choose Many attribute	Includes any record in which the data in the selected field includes all values specified. If any specified values are missing, the record is not included.
does not have all	One Row w/Choose Many attribute	Includes any individual not having at least one associated record for each specified value in which the data in the selected field is equal to the specified value.
has none	One Row w/Choose Many attribute, Many Row	Includes any individual having no associated records in which the data in the selected field is equal to the specified value.
has only	Many Row	Includes any individual having only associated records in which the data in the selected field is equal to the specified value.
has other than	Many Row	Includes any individual having at least one associated record in which the data in the selected field is not equal to the specified value.
has only empty	Many Row	Includes any individual having only associated records in which no data is contained in the selected field.

Available Operator	***Profile Type***	***What is Included***
has none empty	Many Row	Includes any individual having only associated records in which data is contained in the selected field.
has at least one empty	Many Row	Includes any individual having at least one associated record in which no data is contained in the selected field.
has other than empty	Many Row	Includes any individual having at least one associated record in which data is contained in the selected field.
has all less than	Many Row	Includes any individual having only associated records in which the data in the selected field is less than the specified value.
has all more than	Many Row	Includes any individual having only associated records in which the data in the selected field is more than the specified value.
has none less than	Many Row	Includes any individual having no associated records in which the data in the selected field is less than the specified value.
has none more than	Many Row	Includes any individual having no associated records in which the data in the selected field is more than the specified value.
has any less than	Many Row	Includes any individual having at least one record in which the data in the selected field is less than the specified value.
has any more than	Many Row	Includes any individual having at least one record in which the data in the selected field is more than the specified value.
is one of	One Row	Includes any record in which the value of the data in the selected field is equal to one of the values specified in the list of values.

Available Operator	***Profile Type***	***What is Included***
includes	Dialog History, Campaign History, Audience Membership	Includes any individual who has been targeted by the specified dialog and has performed the selected action (Dialog History), any individual who has performed the specified campaign action (Campaign History), or any individual who is a member of the specified audience or segment (Audience History).
not includes	Dialog History, Campaign History, Audience Membership	Includes any individual who has not been targeted by the specified dialog or has not performed the selected action (Dialog History), any individual who has not performed the specified campaign action (Campaign History), or any individual who is not a member of the specified audience or segment (Audience History).
is equal to current date	One Row	Includes any record in which the data in the selected field is equal to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
is prior current date	One Row	Includes any record in which the data in the selected field is prior to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
is after current date	One Row	Includes any record in which the data in the selected field is after the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has any equal current date	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is equal to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has any prior current date	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is prior to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.

Available Operator	***Profile Type***	***What is Included***
has any after current date	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is after the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has all equal current date	Many Row	Includes any individual who has only associated records in which the data in the selected field is equal to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has all prior current date	Many Row	Includes any individual who has only associated records in which the data in the selected field is prior to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has all after current date	Many Row	Includes any individual who has only associated records in which the data in the selected field is after the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has none equal current date	Many Row	Includes any individual who has no associated records in which the data in the selected field is equal to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has none prior current date	Many Row	Includes any individual who has no associated records in which the data in the selected field is prior to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has none after curr. date (has none after current date)	Many Row	Includes any individual who has no associated records in which the data in the selected field is after the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.

Available Operator	***Profile Type***	***What is Included***
is equal to current date +/- number of days	One Row	Includes any record in which the data in the selected field is equal to the date prior to or after the specified number of days from the current date. This operator is particularly useful with dynamic audiences.
is prior to current date +/- number of days	One Row	Includes any record in which the data in the selected field is a date prior to the specified date range. This operator is particularly useful with dynamic audiences.
is after current date +/- number of days	One Row	Includes any record in which the data in the selected field is a date after the specified date range. This operator is particularly useful with dynamic audiences.
is equal to current day +/- number of days	One Row	Includes any record in which the data in the selected field is on the day of the month prior to or after the specified number of days from the current day. This operator is particularly useful with dynamic audiences.
is equal to current month +/- number of months	One Row	Includes any record in which the data in the selected field is in the month prior to or after the specified number of months from the current month. This operator is particularly useful with dynamic audiences.
is equal to current year +/- number of years	One Row	Includes any record in which the data in the selected field is in the year prior to or after the specified number of years from the current year. This operator is particularly useful with dynamic audiences.
has any equal to current date +/- number of days	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is equal to the date prior to or after the specified number of days from the current date. This operator is particularly useful with dynamic audiences.

Available Operator	***Profile Type***	***What is Included***
has any prior to current date +/- number of days	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is a date prior to the specified date range. This operator is particularly useful with dynamic audiences.
has any after current date +/- number of days	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is a date after the specified date range. This operator is particularly useful with dynamic audiences.
has any equal to current day +/- number of days	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is on the day of the month prior to or after the specified number of days from the current day. This operator is particularly useful with dynamic audiences.
has any equal to current month +/- number of months	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is in the month prior to or after the specified number of months from the current month. This operator is particularly useful with dynamic audiences.
has any equal to current year +/- number of years	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is in the year prior to or after the specified number of years from the current year. This operator is particularly useful with dynamic audiences.
is equal to current time +/- number of minutes	One Row	Includes any record in which the data in the selected field is equal to the time prior to or after the specified number of minutes from the current time. This operator is particularly useful with dynamic audiences.
is prior to current time +/- number of minutes	One Row	Includes any record in which the data in the selected field is a time prior to the specified time range. This operator is particularly useful with dynamic audiences.

Available Operator	*Profile Type*	*What is Included*
is after current time +/- number of minutes	One Row	Includes any record in which the data in the selected field is a time after the specified time range. This operator is particularly useful with dynamic audiences.
is equal to current time +/- number of hours	One Row	Includes any record in which the data in the selected field is equal to the time prior to or after the specified number of hours from the current time. This operator is particularly useful with dynamic audiences.
is prior to current time +/- number of hours	One Row	Includes any record in which the data in the selected field is a time prior to the specified time range. This operator is particularly useful with dynamic audiences.
is after current time +/- number of hours	One Row	Includes any record in which the data in the selected field is a time after the specified time range. This operator is particularly useful with dynamic audiences.
has any equal to current time +/- number of minutes	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is equal to the time prior to or after the specified number of minutes from the current time. This operator is particularly useful with dynamic audiences.
has any prior to current time +/- number of minutes	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is a time prior to the specified time range. This operator is particularly useful with dynamic audiences.
has any after current time +/- number of minutes	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is a time after the specified time range. This operator is particularly useful with dynamic audiences.

Available Operator	Profile Type	What is Included
has any equal to current time +/- number of hours	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is equal to the time prior to or after the specified number of hours from the current time. This operator is particularly useful with dynamic audiences.
has any prior to current time +/- number of hours	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is a time prior to the specified time range. This operator is particularly useful with dynamic audiences.
has any after current time +/- number of hours	Many Row	Includes any individual who has at least one associated record in which the data in the selected field is a time after the specified time range. This operator is particularly useful with dynamic audiences.

See “Understanding AAF” (Automation and Configuration Tools).

See Application Fundamentals.

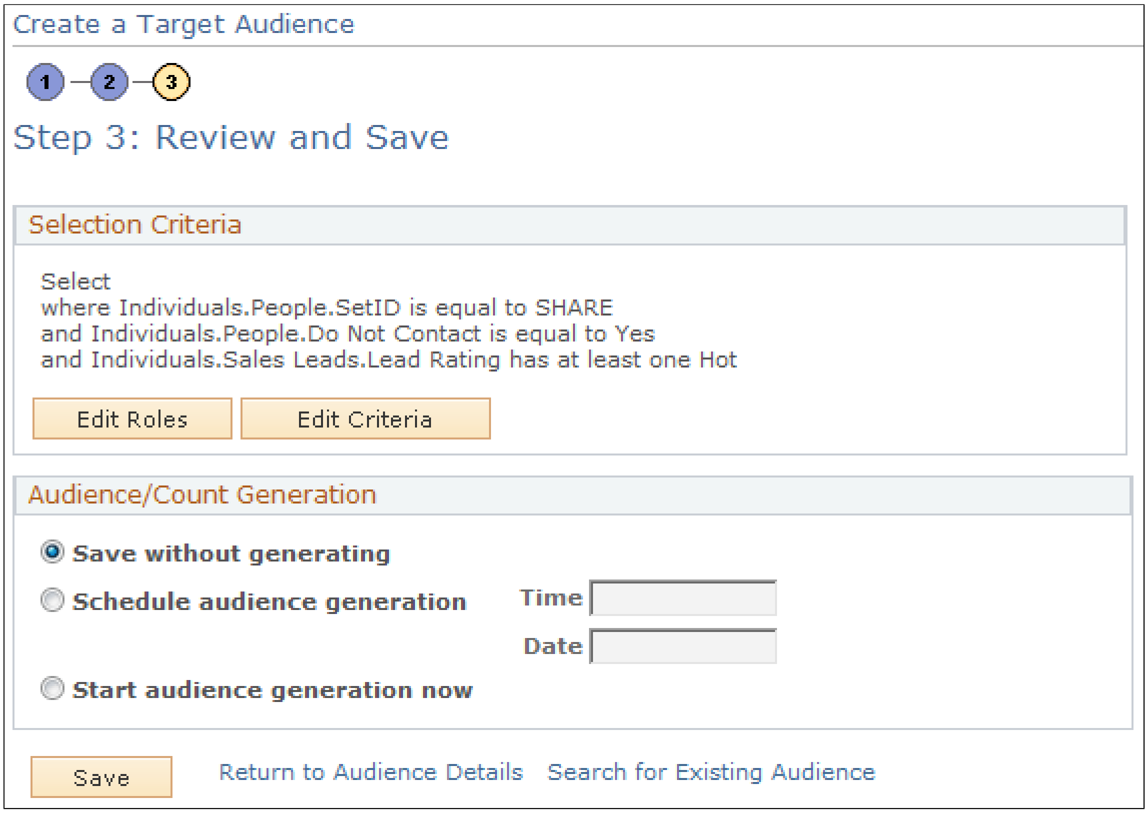
Create a Target Audience - Review and Save Page

Use the Create a Target Audience - Review and Save page (RA_LB_STEP_3) to confirm contents of the audience selection criteria.

Navigation:

Click the **Next Step** button on the Create a Target Audience - Define Selection Criteria page.

This example illustrates the fields and controls on the Create a Target Audience - Review and Save page.



Selection Criteria

This region displays, in text form, the selection criteria that you defined in step 2. Click the **Edit Roles** button to change the selected roles. Click the **Edit Criteria** button to change the selection criteria.

Audience/Count Generation

Specify at what point you will generate the audience. You can specify audience generation on this page or on the Audience Details page.

Field or Control	***Description***
Save without generating	Select to save the Audience Builder definition for future use.
Schedule audience generation	Select to generate the audience at a particular date and time. Specify a time and date.
Start audience generation now	Select to generate the audience immediately upon saving.

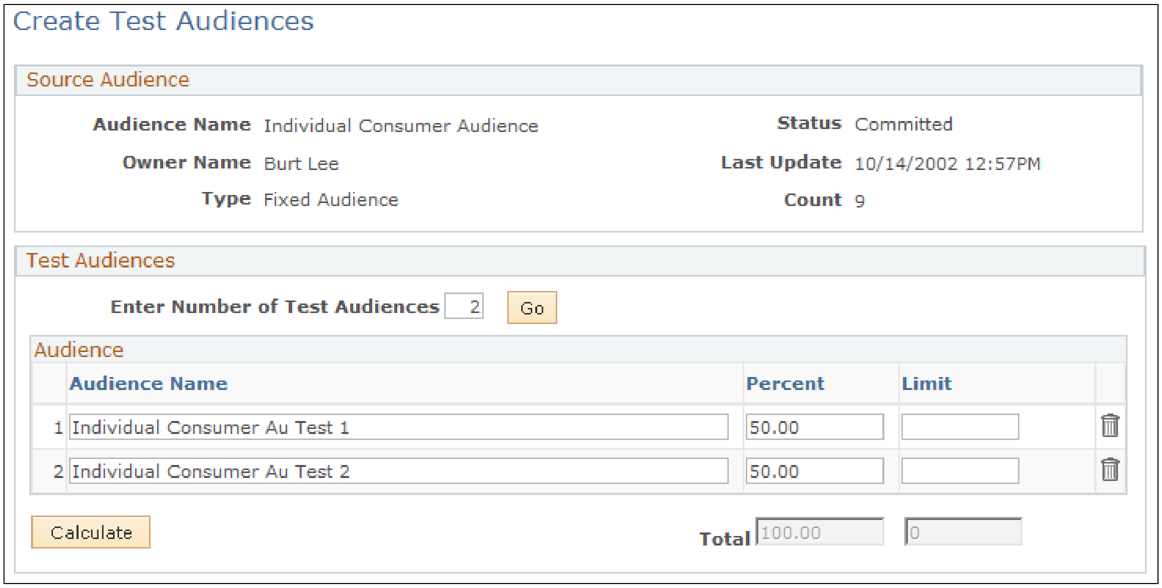
Create Test Audiences Page

Use the Create Test Audiences page (RA_TEST_AUDIENCE) to create one or more test audiences for an audience in generated, approved, or committed status.

Navigation:

Click the **Create Test Audience** button on the Audience Detail page.

This example illustrates the fields and controls on the Create Test Audiences page.



You create a test audience by selecting a subset of a generated audience. Use test audiences to try different offers on different subsets of your audience. You can create these test audiences as a percentage of the original audience count, or users can specify the total number of records for each test audience. Test audience selection is random. All test audiences are fixed audiences.

Note: The **Create Test Audiences** button is available only when an audience is in the status of generated, approved, or committed.

Field or Control	***Description***
Enter Number of Test Audiences	Enter the number of test audiences into which you want to divide your original audience. Click **Go** to divide the original audience.
Audience Name	Accept the name created by the system, or rename the test audience.
Percent	Indicates the percent of the original audience that each test audience makes up. The system initially divides the original audience into equal (or approximately equal) percentages, but you can adjust the percentages as desired. The total does not have to equal 100, because only the test audiences are included in the total.

Field or Control	Description
Limit	Enter a maximum count for the test audience. The limit overrides the percentage value. For example, if your original audience size is 210 and you create a test audience of 10 percent with a limit value of 20, the test audience size is 20 rather than 21.

Segment Detail Page

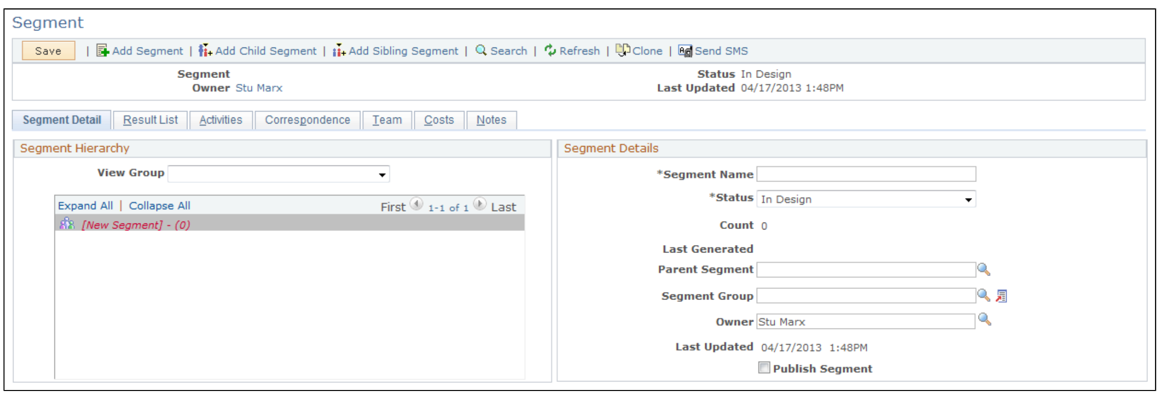
Use the Segment Detail page (RA_LIST_SEG_MAIN) to define and update segments.

Navigation:

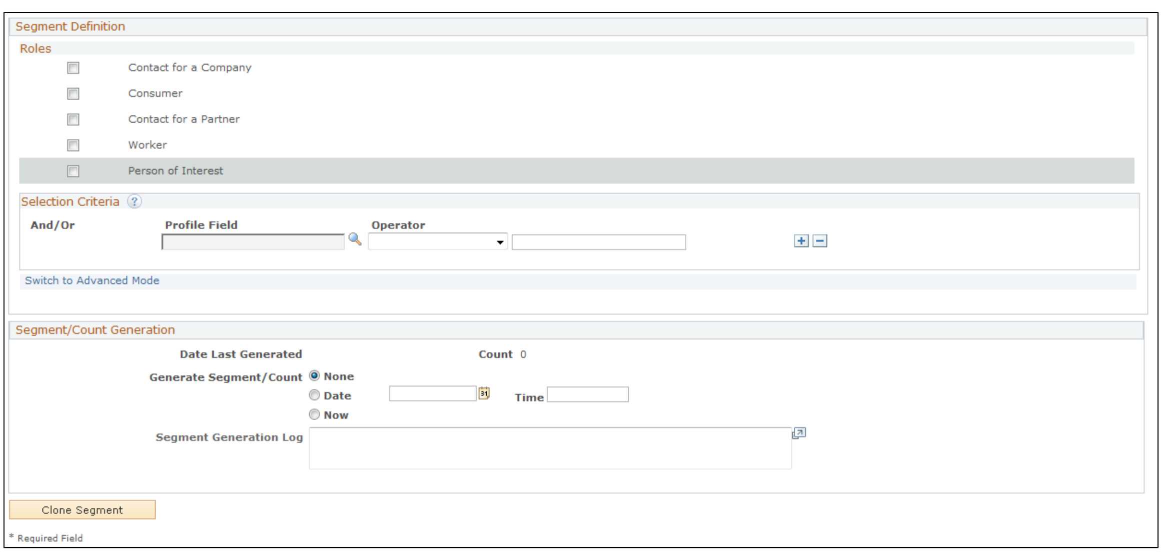
Click a segment name on the Audiences page to open an existing segment.

Click the **Create a New Segment** button on the Audiences page to define a new segment.

This is the first of two examples illustrating the fields and controls on the Segment Detail page.



This is the second of two examples illustrating the fields and controls on the Segment Detail page.



Creating and updating segments is similar to creating and updating audiences, with a few differences.

The full Segment Details page includes up to three regions depending on status. Possible regions are a Segment Details region, a Segment Hierarchy region, a Segment/Count Generation region, and a Segment Definition region. Fields may be available for selection (or input) or may be display-only depending on several variables.

Segment Hierarchy

You create segment hierarchies by defining parent-child relationships between segments. A segment can have multiple children, but only one parent. A child segment always inherits the selection criteria of its parents, and by default inherit its parent's owner attribute.

Field or Control	***Description***
View Group	Select a segment group from the available options to view that group's hierarchical information. Selecting a segment group refreshes the page and displays the segments that are part of the selected group so that you will be prompted to save any changes to the segment.

Segment Details

Field or Control	***Description***
Segment Name	Enter a descriptive name for the segment.
Status	Select the segment's current status from the available options.
Parent Segment	If the segment is to be the child of an existing segment, select the segment name from the lookup. If the segment is not the child of another segment, leave this field blank.
Segment Group	Click the lookup button to select an existing segment group, or click the **Add New Segment Group** button to define a new one. Every segment must belong to a segment group.
Publish Segment	Select this check box if you want to make this segment available to the enterprise outside of PeopleSoft Marketing. **Note:** A child segment can be published only if its parent segment is published.

Segment Definition

Field or Control	Description
Roles	A person is represented in the PeopleSoft CRM Customer Data Model as a *Contact for a Company* (a representative of a company), a *Consumer,* a *Worker,* or a *Person of Interest.* A person might appear as a contact multiple times, if the individual represents more than one company or has more than one role. You must select at least one option, but can select more than one to include all eligible records.
Selection Criteria	Selection criteria for segments are defined similarly to those for audiences. See Audiences Page.

Segment/Count Generation

This section is identical to the Audience/Count Generation region on the Audience Details page.

See Audiences Page.

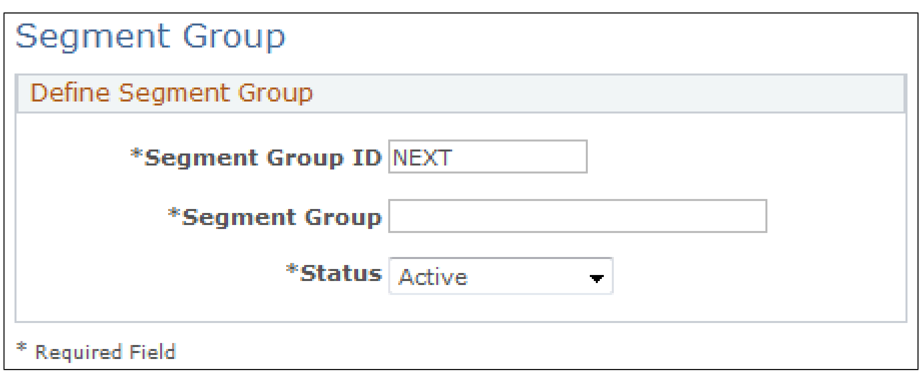
Define Segment Group Page

Use the Define Segment Group page (RA_SEGMENT_GROUP) to define segment groups, which are used to group segments and segment hierarchies.

Navigation:

- **Set Up CRM** > **Product Related** > **Marketing** > **Audiences** > **Segment Groups**
- Click the **Add New Segment Group** button on the Segment Detail page.

This example illustrates the fields and controls on the Define Segment Group page.



A *segment group* is a means of arranging segments and segment hierarchies into logical groupings.

Field or Control	Description
Segment Group ID	Enter a unique character ID for the segment; by default, the segment is assigned the next available ID number.
Segment Group	Enter a name for the segment group.
Status	Select *Active* to make the segment group available to have segments and hierarchies assigned to it; select *Inactive* to make it unavailable.

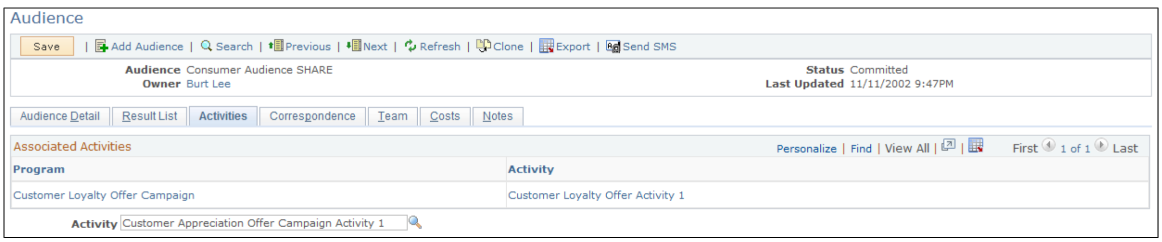
Audience - Activities Page

Use the Audience - Activities page (RA_LIST_WAVES) to view activities associated with audiences.

Navigation:

Marketing > **Audiences** > **Activities**

This example illustrates the fields and controls on the Audience - Activities page.



View campaign activities with which the audience or segment is associated. One audience or segment can be associated with many activities.

Note: You associate audiences and segments with activities during marketing campaign activity creation. This page is a view of existing data only, and you cannot attach an audience or segment to an activity from it.

Field or Control	Description
Program	Displays the descriptive name of the campaign to which an activity that is associated with the audience or segment belongs. Click to access the Campaign Detail - Campaign Details page.
Activity (prompt)	Displays an activity with which the audience or segment is associated. Click to access the Campaign Detail - Activity Details page.

Field or Control	*Description*
Activity	Select the campaign activity with which to associate the audience or segment. The association is made when the audience or segment is saved.

Plans Page

Use the Plans page (RA_LIST_PLANS) to define plans for audiences and segments.

This page is visible only if the audience or segment has been published.

Navigation:

Marketing > **Audiences/Segments** > **Plans**

Segment and audience plans contain the specific goals for a segment or audience in PeopleSoft Marketing. You can associate a template with a segment or audience plan, or manually enter the information.

Note: The Plans page is visible only if the audience or segment has been published.

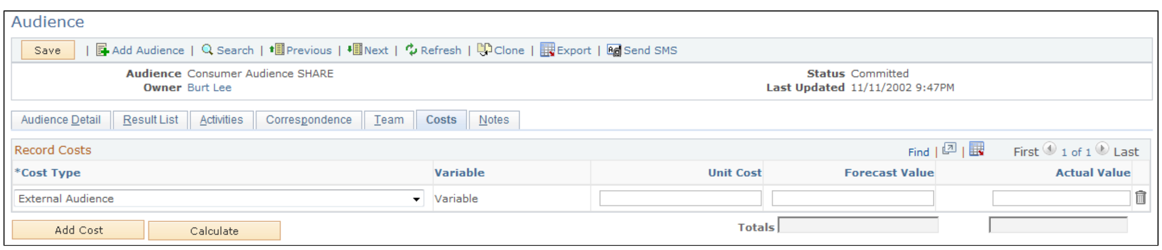
Audience - Costs Page

Use the Audience - Costs page (RA_LIST_COST) to associate costs with audiences.

Navigation:

Marketing > **Audiences** > **Costs**

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



Some audiences or segments have costs that are directly associated with the audience or segment itself. For example, lists rented from a third-party vendor are often priced by the number of names provided.

Field or Control	*Description*
Cost Type	Select the cost to be associated with the audience or segment.
Variable	Displays whether the cost type is defined as variable or fixed.

Field or Control	***Description***
Unit Cost	Enter the cost of one unit.
Forecast Value	Enter the expected cost of all units.
Actual Value	Enter the actual cost of all units.

Audience - Notes Page

Use the Audience - Notes page (RA_LIST_NOTE) to view brief descriptions of your audience notes and access those notes.

Navigation:

Marketing > **Audiences** > **Notes**

View summary information about all notes related to this audience. Also, create new notes.

See “Understanding Notes and Attachments” (Application Fundamentals).

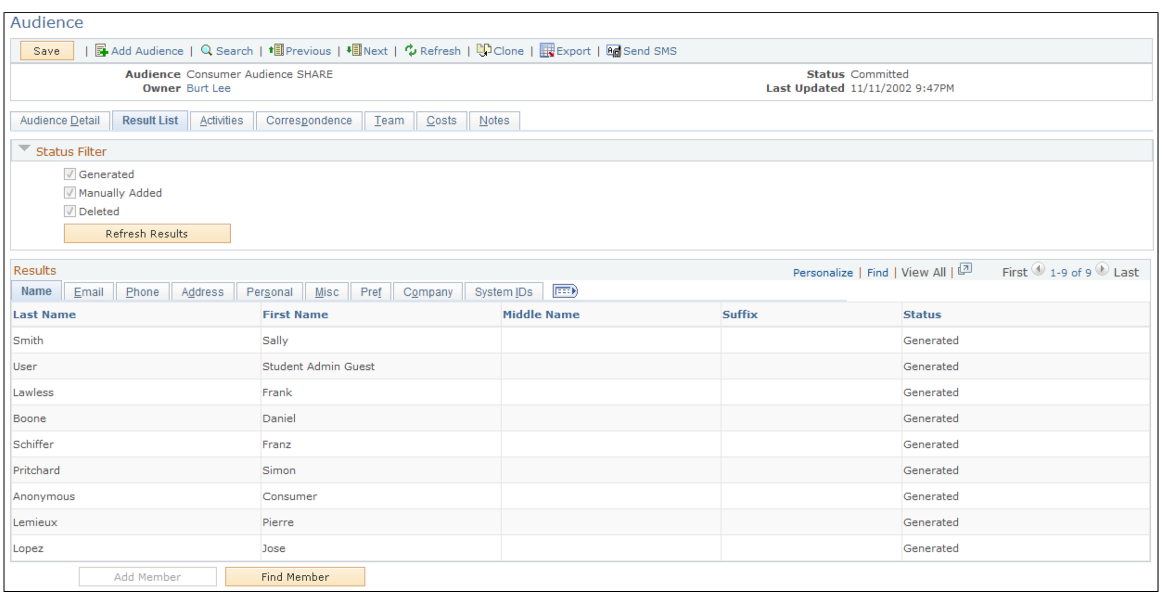
Audience - Result List Page

Use the Audience - Result List page (RA_LIST_RECS) to view, add, or eliminate records from a generated audience.

Navigation:

Marketing > **Audiences** > **Audience Result List**

This example illustrates the fields and controls on the Audience - Result List page.



Note: The Audience - Result List page is not available until after the audience has been generated. Until the audience is generated, no records appear.
The Audience - Result List page enables you to add selected records to and remove them from a generated fixed audience. You can customize the information that appears on the tabs on the Audience - Result List page. Use this information to determine what records you want to add or remove from the audience.
You can add, delete, and restore rows only for fixed audiences, not dynamic audiences or segments.

Status Filter

Select the check boxes to specify which types of audience members you want to display, then click the **Refresh Results** button to apply your changes. The *Auto Added* and *Deleted* values are visible for all audience types; the *Manually Added* value is visible only for fixed audiences.

Results

Field or Control	***Description***
Select	Select the check box beside individual records to identify those that you do not want to include in the audience, or click **Select All** to select all records. Selected records are not run against any campaign activities using the audience. **Note:** Removing a record from the audience does not delete it from the Audience table. The record is noted on the table as being removed, and does not appear on this page the next time that the page is accessed.
Delete	Click to remove selected records. The system removes the records when the page is saved. Manually added audience members that have been deleted must be manually re-added to the audience to restore them.
Restore	Click the **Restore Selected Rows** button to restore previously deleted records. This button appears only when the audience contains previously deleted members.
Status	Displays whether the audience member was auto added, manually added, or deleted.
Add Member	Click to go to a search page where you can search for and add one or more members to the audience. The button is visible only for noncommited fixed audiences. If the selected member does not exist, you can choose to add them; if the member is a duplicate, a message displays to let you know this.

Field or Control	*Description*
Find Member	Click to search for members to add to the audience. If the member you select already exists in the audience, an error message appears informing you of this fact. You can search on Last Name, First Name, and Name. **Note:** Audience members are presumed to be duplicates if they have the same BO ID and role.

Checking for Duplicate Audience Members

When manually adding audience members, it is necessary to prevent duplicate members from being added to the audience. In the case of duplicate members, the member who is added to the audience (the "surviving member") depends on various factors. The following table illustrates some common scenarios and their expected outcomes:

Scenario	*Outcome*
Audience A has an auto-added member, John Smith. John Smith is an active member. From the Add Member page, a user selects John Smith and attempts to manually add him to Audience A.	John Smith cannot be added as a duplicate member, because he already exists as an active member in the audience.
Audience A has an auto-added member, John Smith. John is not an active member. From the Add Member page, a user selects John Smith and attempts to manually add him to Audience A.	John Smith cannot be added as a duplicate member, because he already exists as a member. You can restore the inactive John Smith to active status.
Audience A has a manually added member, John Smith. John is an active member. Currently, there are no auto-added members. A user modifies Audience A to add a selection criterion of "First Name starts with J," then generates Audience A.	The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience A is the manually added John Smith, not the auto-added one.

Scenario	*Outcome*
Audience A has an auto added member, John Smith. John is an active member. Audience B has a manually added member, John Smith. John is an active member. A user merges Audience A with Audience B. The newly merged audience is Audience C. The user generates Audience C.	The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.
Audience A has an auto-added member, John Smith. John is not an active member. Audience B has a manually added member, John Smith. John is an active member. A user merges Audience A with Audience B. The newly merged audience is Audience C. The user generates Audience C.	The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.
Audience A has an auto-added member, John Smith. John is an active member. Audience B has a manually added member, John Smith. John is an active member. A user links Audience A with Audience B by using the audience membership selection criteria. The newly merged audience is Audience C. The user generates Audience C.	The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.
Audience A has an auto-added member, John Smith. John is not an active member. Audience B has a manually added member, John Smith. John is an active member. A user links Audience A with Audience B by using the audience membership selection criteria. The newly merged audience is Audience C. The user generates Audience C.	The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.

Customizing Your Audience Records Page

Access the Audience Records - Personalize Columns and Sort Order page.

Click the **Customize** link to access the Personalize Column and Sort Order page when you can specify the information that you want to appear on the Audience Records page. Customize the Audience Records page by selecting what tabs and columns you want to appear. To reorder the column display, select the check box beside the column that you want to move, and then click the **Move Up** or **Move Down** button.

Audiences - Correspondence Page

Use the Audiences - Correspondence page (RA_LIST_CM) or the Segment - Correspondence page to view summary information about audience correspondence and initiate new correspondence.

Navigation:

Marketing > **Audiences** > **Correspondence**

The Audiences - Correspondence page provides a summary view of all correspondence associated with an audience and enables you to create a new email or print correspondence using PeopleSoft CRM Correspondence Management functionality. Complete information about using Correspondence Management is available in the PeopleSoft Application Fundamentals documentation.

Use audiences Correspondence Management when you want to communicate with an entire audience rather than just a few. The correspondence is sent to all audience members with a valid address depending on the correspondence channel chosen.

Warning! Select your correspondence channel on the Audiences - Correspondence page and do not change it within the Correspondence Management component. The system automatically checks for valid email or mailing addresses depending on the correspondence channel chosen on the Audiences - Correspondence page. If the selection is changed within the Correspondence Management component, the address validation is not rechecked and may result in errors.

Note: The number of contacts using audience correspondence is limited by your audience maximum rows setting.

See “Understanding Correspondence and Notification Settings” (Automation and Configuration Tools).

See Defining Audience Information.

See Application Fundamentals.

Audience - Team Page

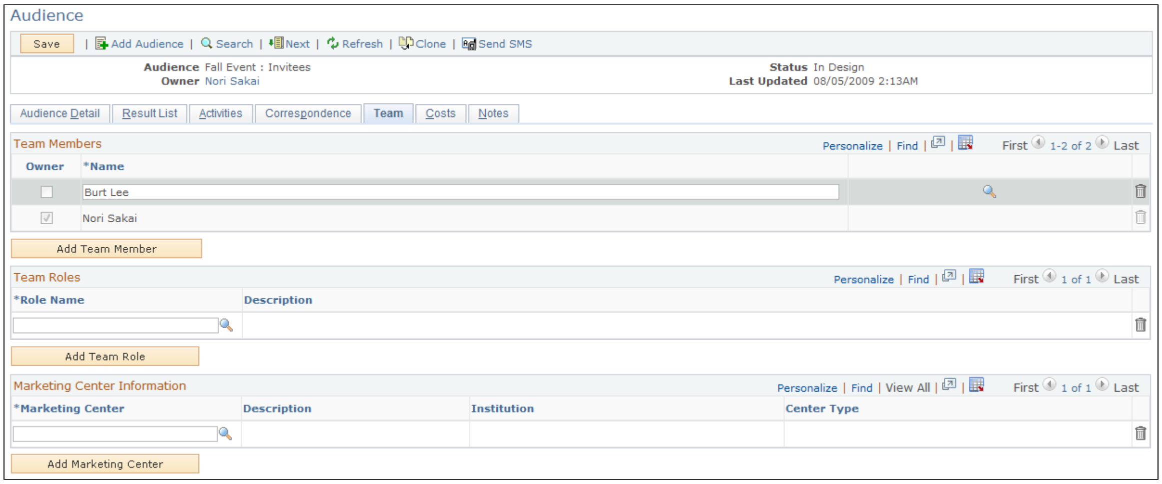
Use the Audience - Team page (RA_LIST_TEAM) to associate team members with an audience.

You can associate individual workers or entire roles as team members—in the case of roles, each individual worker who has that role is considered a team member. Team membership can be used to control or limit who can access this audience or segment.

Navigation:

Marketing > **Manage Audiences** > **Team**

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



Team Members

Field or Control	***Description***
Owner	Select this check box to designate the indicated person as the team owner.
Name	Enter a name in the field or use the lookup to select one.
Add Team Member	Click to add another row to the list.

Team Roles

Field or Control	***Description***
Role Name	Enter a role name or use the lookup to select one.
Add Team Role	Click to add another row to the list.

Marketing Center Information

The Team page of the Audience Builder component includes a Marketing Center grid, allowing you to specify which team members have access to a prospect for the purpose of building audiences.

Marketing Center Search is only used when the CS_CONSTITUENT profile is selected as a selection criterion. The Marketing Center or its children selected must match the Marketing Center or its children that have been selected in the constituent’s Academic Record.

You can add or delete Marketing Centers from the Team tab; it will show the Marketing Center, Marketing Center Description, Institution Description, and Center Type.

If Marketing Centers are added to the grid in addition to the team members and team roles, then users are authorized to access the audience if any of the following are true:

- The user is added as a team member.
- The user is part of the team role.
- The user is authorized to at least one of the specified Marketing Centers.

Note: In order to secure an audience, you must select the **Secured Audience** check box on the Audience Detail page.

See “Understanding Marketing Center Security” (PeopleSoft CRM for Higher Education).

Using Delivered Active Analytics Framework Terms with Audiences

The Active Analytics Framework (AAF) Data Library is a shared catalog of data items available through the database. Each distinct data item is called a *term.* You can use Audience Builder to build selection criteria using AAF Terms that are delivered with PeopleSoft Marketing. This section discusses the terms that are delivered.

Marketing Interaction Data

The following AAF terms are available in the Marketing Contact History folder. All are of data type Number and Implementation Type SQL Object.

Note: Time periods will span from the start of the current time period to the current day.
You can use marketing interaction contact frequency information to define audience search criteria in Audience Builder.

- Marketing Contacts this Month.
- Marketing Contacts this Month via Email.
- Marketing Contacts this Month via Mail.
- Marketing Contacts this Month via Phone.
- Marketing Contacts this Quarter.
- Marketing Contacts this Quarter via Email.
- Marketing Contacts this Quarter via Mail.
- Marketing Contacts this Quarter via Phone.
- Marketing Contacts this Year.
- Marketing Contacts this Year via Email.
- Marketing Contacts this Year via Mail.
- Marketing Contacts this Year via Phone.

This example illustrates the fields and controls on the Contact History folder.

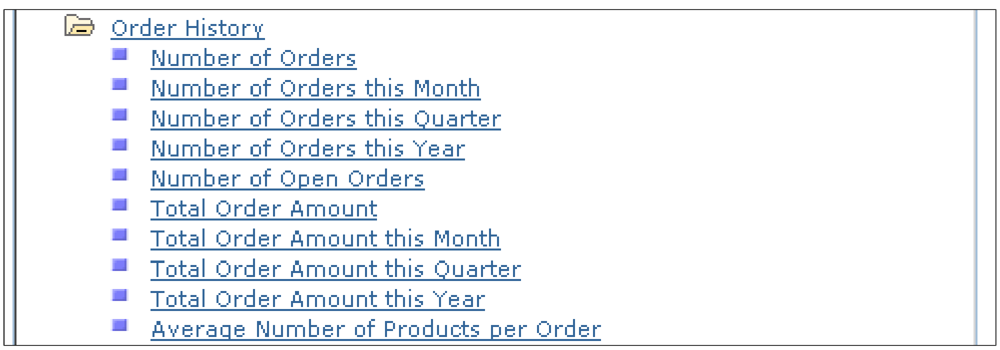
Phone contacts are calculated from call result data.

Email and direct mail contacts are calculated from correspondence request interactions that were initiated from a campaign or audience.

Order History Data

You can define selection criteria using order history data.

This example illustrates the fields and controls on the Order History folder.



The following Order History AAF terms are available under the Audience Builder Order History folder:

Note: Time periods span from the start of the current time period to the current day.

- Number of Orders this Month.*
- Number of Orders this Quarter.*
- Number of Orders this Year.*
- Number of Orders.*
- Number of Open Orders.**
- Total Order Amount this Month.*
- Total Order Amount this Quarter.*

- Total Order Amount this Year.*
- Total Order Amount.*
- Average Number of Products Per Order.*

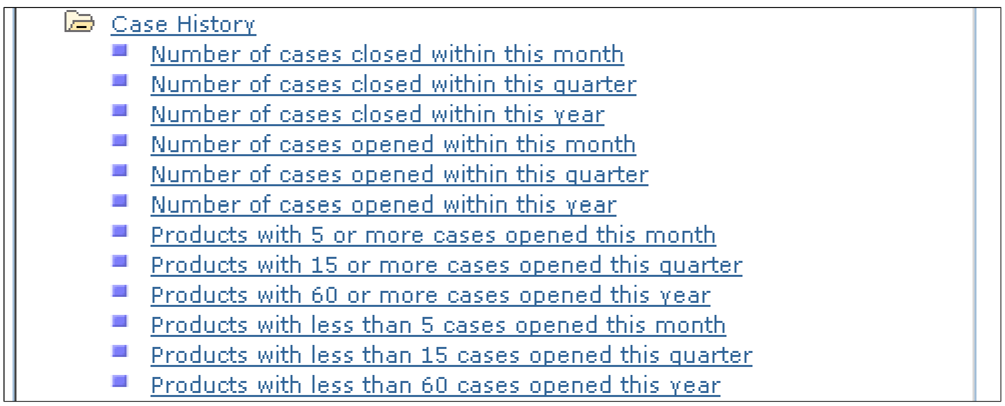
*Orders with status of Submitted, In Fulfillment, Fulfillment Hold, and Complete are included in these calculations.

**Orders with status New and Hold are included in these calculations.

Case History Data

You can define selection criteria using case history data. Only the Contact for a Company role is supported for use in conjunction with Case History criteria.

This example illustrates the fields and controls on the Case History folder.



The following Case History AAF terms are available under the Audience Builder Case History folder:

- Number of cases opened within this month.
- Number of cases opened within this quarter.
- Number of cases opened within this year.
- Number of cases closed within this month.
- Number of cases closed within this quarter.
- Number of cases closed within this year.
- Products with 5 or more cases opened this month.
- Products with 15 or more cases opened this month.
- Products with 60 or more cases opened this month.
- Products with fewer than 5 cases opened this month.
- Products with fewer than 15 cases opened this month.
- Products with fewer than 60 cases opened this month.

Using History and Audience Membership Data with Audiences

The Dialog History, Campaign History, and Audience Membership items enable you to view audience and segment membership data along with information about campaign and dialog activity.

Audience and Segment Membership

You evaluate whether an individual is an audience or segment member using the Audience Membership folder in the Audience Builder's Select a Profile Field page:

This example illustrates the fields and controls on the Audience Membership folder.

Using multiple Audience Membership criteria with AND and OR enables you to create audiences and segments made up of the union, intersection, or subtraction of multiple audiences and segments.

See Audiences Page.

Marketing Execution and Response Data

You can define selection criteria using Marketing Execution and Response information. This information is derived from the Marketing contact data captured by Correspondence Management, Sales, and Order Capture.

This information is available in the Audience Builder under the Campaign History folder:

This example illustrates the fields and controls on the Campaign History folder.

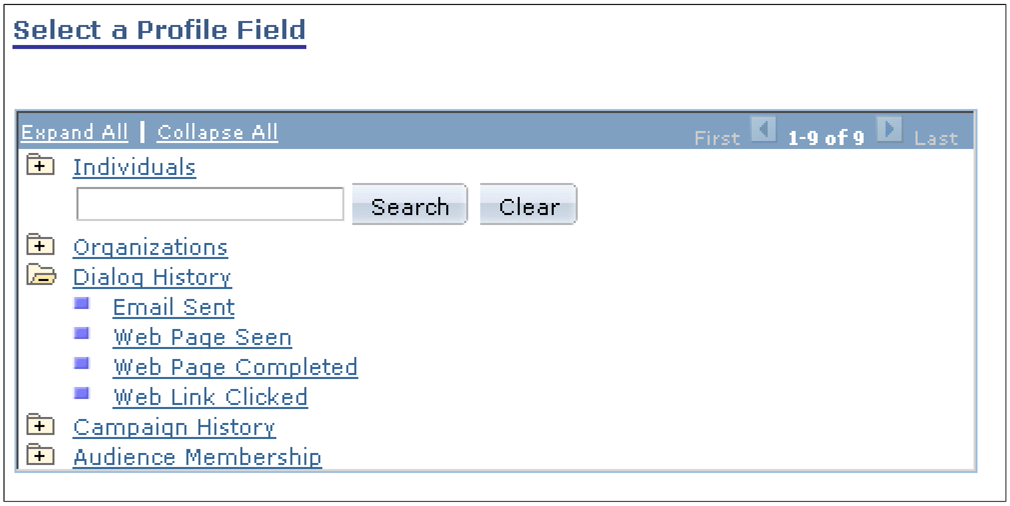
Data Item	***Description***
Campaign Activity Executed	Choose from a list of completed campaign activities. The query returns all individuals who were targeted (or not targeted) by the identified campaign activity through correspondence management email or direct mail.
Lead Accepted	Choose from a list of completed campaign activities. The query returns all individuals whose sales lead created by that campaign activity was accepted (or not accepted).
Order Placed	Choose from a list of completed campaign activities. The query returns all individuals who have (or have not) placed an order and referenced the campaign activity's promotion code.

Dialog Execution and Response Data

You can define selection criteria using Dialog Execution and Response information. The information includes data on email sent and web pages seen, completed, and clicked.

This information is available in the Audience Builder under the Dialog History folder:

This example illustrates the fields and controls on the Dialog History folder.

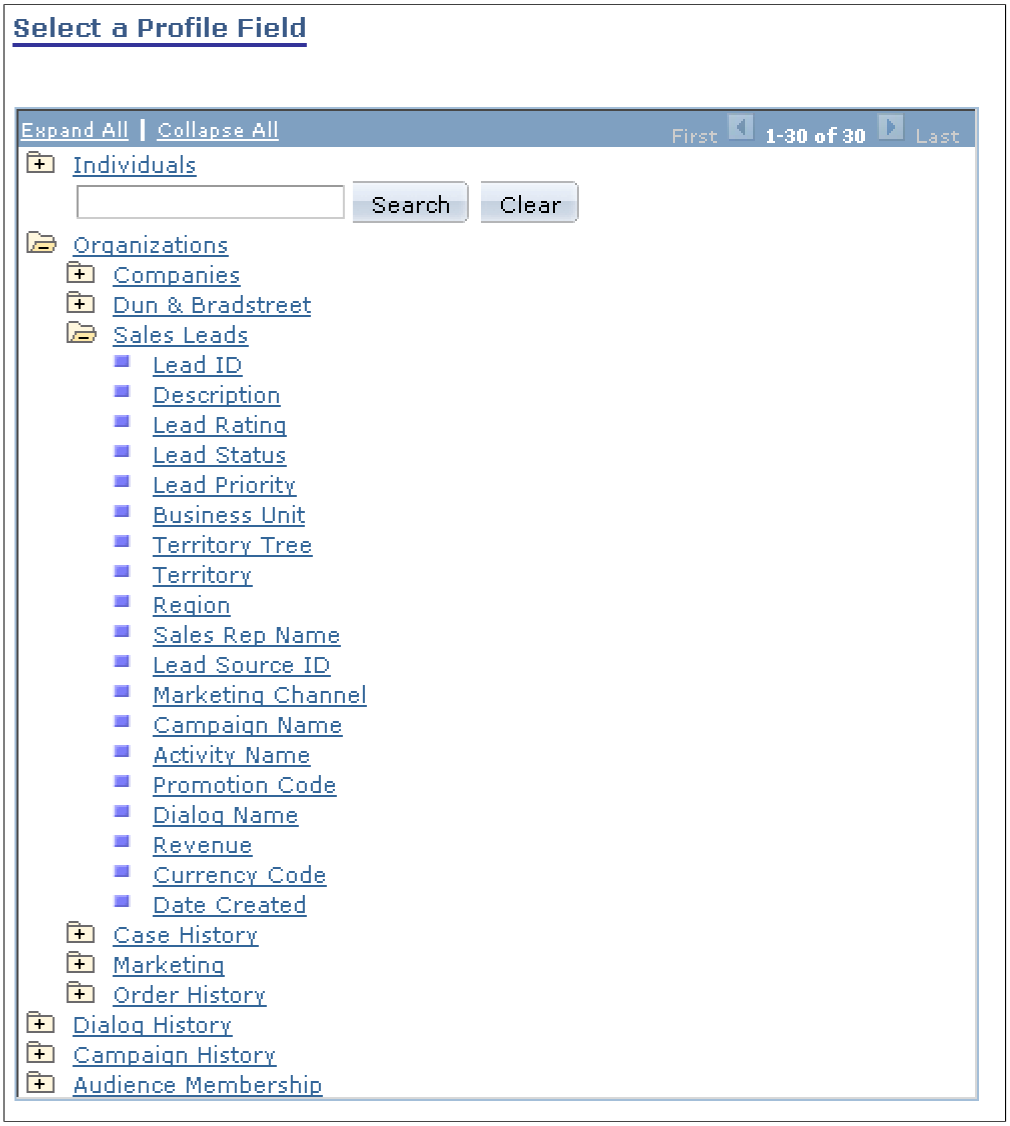


Data Item	**_Description_**
Email Sent	The query returns all individuals to whom the dialog bulk or single email was sent.
Web Page Seen	The query returns all individuals who viewed the specified dialog web page.
Web Page Completed	The query returns all individuals who submitted the specified dialog web page.
Web Link Clicked	The query returns all individuals who clicked the specified dialog web link.

Using the Sales Leads Profile with Audiences

The following Sales Lead profile fields, which are part of the Individuals.Sales.Leads and Organizations.Sales.Leads profiles, are available in Audience Builder for defining selection criteria:

This example illustrates the fields and controls on the Sales Leads profile fields.



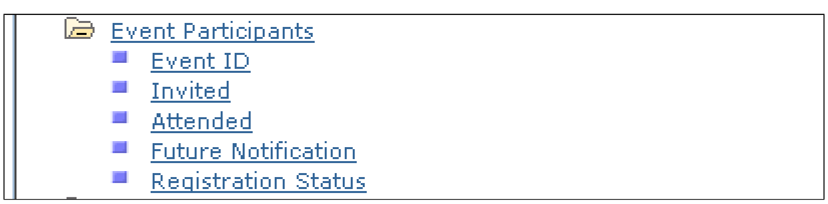
Sales Leads Profile Field	***Use Type***
Lead ID	Text
Description	Text
Lead Rating	Choose One
Lead Status	Choose One
Lead Priority	Choose One
Business Unit	Prompt

Sales Leads Profile Field	***Use Type***
Territory Tree	Prompt
Territory	Prompt
Region	Prompt
Sales Rep Name	Text
Lead Source ID	Prompt
Marketing Channel	Choose One
Campaign Name	Text
Activity Name	Text
Promotion Code	Prompt
Dialog Name	Text
Revenue	Number
Currency Code	Prompt
Date Created	Date

Using the Event Participants Profile with Audiences

The following Event Participants profile fields, which are part of the Individuals profiles, are available in Audience Builder for defining selection criteria:

This example illustrates the fields and controls on the Event Participants profile fields.



Data Item	Description	Field Type
Event ID	The ID of the event in the Event Management tables.	Map Field Choice to Prompt
Invited	All participants from the Event Management tables that have been marked as *Invited.*	Yes/No
Attended	All participants from the Event Management tables that have been marked as *Attended.*	Yes/No
Future Notification	All participants in the Event Management tables that have been marked as *Future Notification* (that is, those who are interested in being contacted for future events).	Yes/No
Registration Status	One of three options: *Registered, Declined,* or *Waitlisted.*	Choose One

These profile names are available for the Consumer, Contact for Consumer, and Worker roles.

Defining Active Analytics Framework Terms for Audiences

If the Active Analytics Framework terms delivered with PeopleSoft Marketing don't meet your needs, you can define your own. This section describes the rules and guidelines for building terms for use in selecting audiences and segments.

See “Understanding AAF” (Automation and Configuration Tools).

AAF Resolution Methods

A resolution method is the way in which AAF resolves a term's value. Because audience generation is a set-based SQL process, Audience Builder can have access to only those terms that were implemented by certain resolution methods that support set-based selection. Audience Builder supports the following resolution methods:

- Audience Select SQL Object.
- Audience Select Record.Field.

AAF Implementation Limitations

The AAF Data Library enables multiple implementations to be defined for a term, and the context in which a term is resolved determines which implementation is used to resolve its value. Due to the nature of the audience selection process, the following limitations apply to implementations:

- Only contextual implementations that have been defined for and which are associated with the Audience Builder component context are allowed.

- Only implementations that have binds BO_ID_PERSON or BO_ID_CUSTOMER are supported.

  One or the other of these two binds is required.

- Only implementations with the following return data types are supported:

  - String
  - String Array
  - Number
  - Number Array
  - Date
  - Date Array
  - Time
  - Time Array

- SQL Object implementations must return a *single* column only.

- Meta-SQL is not supported in audience queries.

  Meta-SQL that cannot be resolved by Audience Builder itself cannot be used within SQL Objects' SQL text or Record.Field's Where clauses. Audience Builder can resolve only the following Meta-SQL terms:

  - %DateIn
  - %TimeIn
  - %DateTimeIn
  - %CurrentDateIn
  - %CurrentTimeIn
  - %CurrentDateTimeIn
  - %Upper

AAF Term Requirements

The following requirements must be met of any AAF term that is available to the Audience Builder:

- The return data type must be a scalar type of string, number, date, time, or datetime.
- The Number of Values attribute can be either one or many.
- The term must have an Audience Builder contextual implementation defined.

The implementation must meet the requirements noted previously for supported implementations and resolution methods.

Supported Operators

The operators supported for AAF terms are a subset of those supported for profile fields. The following table shows the supported operators by term data type:

Term Data Type	***Implementation Returns One/Many***	***Supported Operators***
String	One	is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, contains**, not contains**, starts with*, not starts with*, ends with*, not ends with*, is one of* *Supported only for terms implemented with the Audience Select Record.Field resolution method (not the Audience Select SQL Object resolution method). **Supported only for terms implemented with the Audience Select Record.Field resolution method and only in advanced mode.
String	Many	has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than
Number	One	is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, is one of
Number	Many	has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than

Term Data Type	*Implementation Returns One/Many*	*Supported Operators*
Date	One	is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, is one of, is equal to current date, is after current date, is prior current date
Date	Many	has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than, has any equal current date, has any prior current date, has any after current date, has all equal current date, has all prior current date, has all after current date, has none equal current date, has none prior current date, has none after current date
Time	One	is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, is one of
Time	Many	has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than

WITH Clauses

With clauses are supported between multiple terms if each term meets the following criteria:

- Uses the Audience Select Record.Field implementation.
- References the same record name in the implementation.
- Has identical binds and where clauses defined in the implementation.
- Returns multiple values.

With clauses function in the same way as they do for Many-Row profile fields; with clauses are available only in advanced mode.

Criteria Value Prompting

Audience Builder supports prompting for criteria values when the term has a prompt defined. The following prompt types are supported:

- Prompt (prompt table)
- Translate (XLAT)

Multi-select prompting is not supported.

Exporting Audiences for Use Outside the PeopleSoft CRM Application Suite

This topic provides an overview of audience export and discusses how to export an audience.

Page Used to Export Audiences

Page Name	***Definition Name***	***Usage***
Export Audience Page	RA_EXPORT_AUDIENCE	Create a version of an audience in a common file format that you can export for use outside the PeopleSoft CRM application suite.

Understanding Audience Export

Frequently, marketers must use services that require a generated audience to be transferred outside the PeopleSoft CRM application suite. For example, you might want to use a service that appends consumer behavior information to your audience. PeopleSoft Marketing enables you to export a generated audience using a common file format.

Note: You can export only *Internal* audiences and audiences with a status of *Approved, Archived, Committed,* or *Generated.*

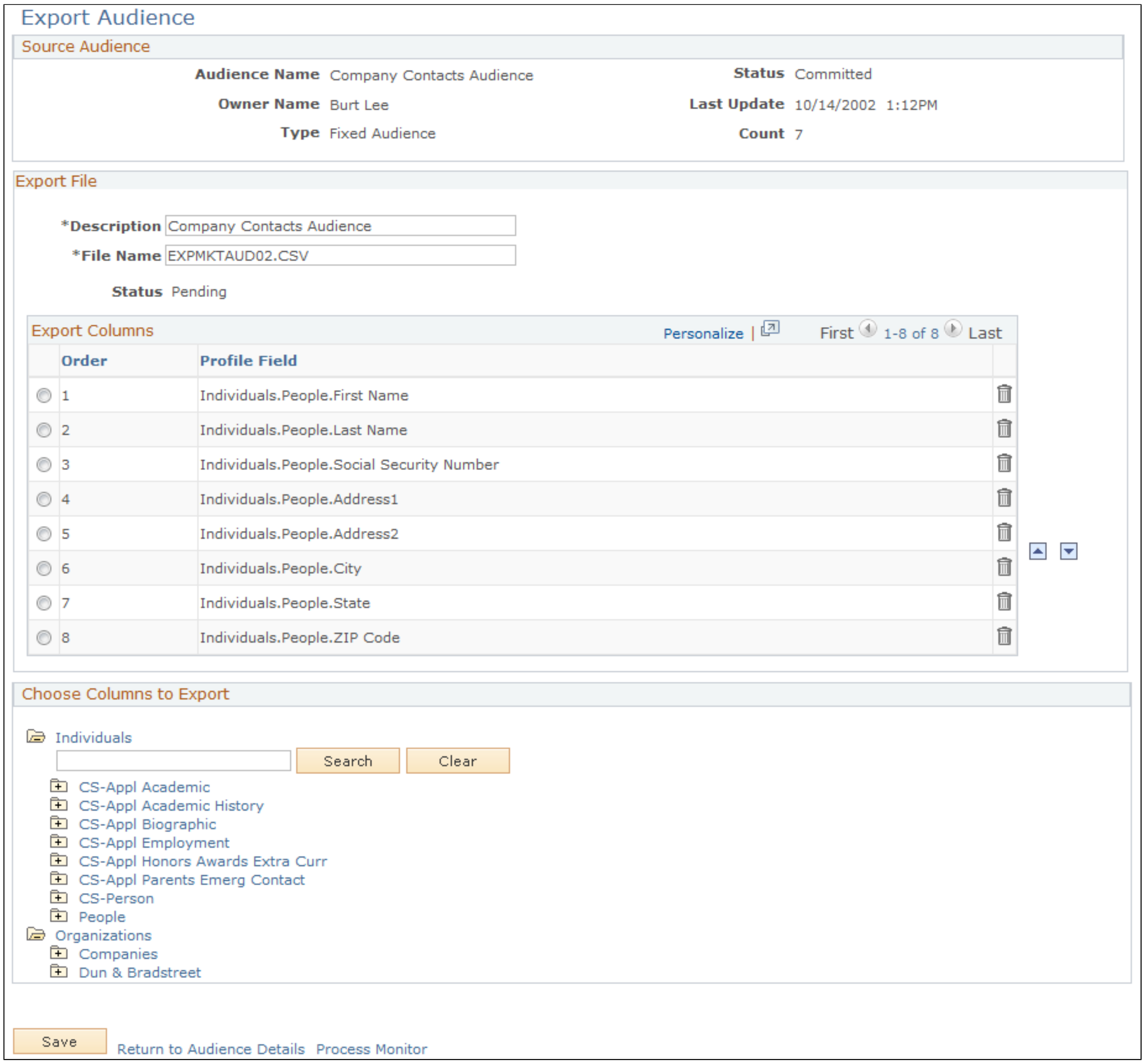
Export Audience Page

Use the Export Audience page (RA_EXPORT_AUDIENCE) to create a version of an audience in a common file format that you can export for use outside the PeopleSoft CRM application suite.

Navigation:

Click the **Export**button on the Audience page toolbar.

This example illustrates the fields and controls on the Export Audience page.



Field or Control	***Description***
Description	Enter a description of the audience.
File Name	Displays a file name for the export file. The system automatically creates this name; you can change it if desired.

Selecting Profile Fields to Export

In the **Choose Columns to Export** region, select columns by expanding the profile tree to the profile field (column) level. You can export columns from multiple profiles. Click the column name to add it to the **Export Columns** area.

Arranging the Export Columns Order

Columns selected from the **Choose Columns to Export** area appear in the **Export Columns** area in the order selected. To change the order, select the option next to the profile field and use the up or down arrow to change the location.

Note: Changing the Export Columns order after you have created an export audience does not change the order in the created file. To change the order, you must rerun the process.

Exporting the File

When you are finished choosing and arranging columns for export, click the **Save** button to save the export definition and schedule the export file batch process. Click the **Refresh Page** button to check for updates to the process status.

Related Links

Application Fundamentals

Sending SMS Messages to Audiences

You can specify outbound SMS messages to be sent to audiences.

Pages Used to Send SMS Messages to Audiences

Page Name	***Definition Name***	***Usage***
Audience Page	RA_LIST_SUMMARY	Create and update audiences.
SMS Request Page	RB_SMS_REQUEST	Specify details about SMS messages to be sent to audiences.

Audience Page

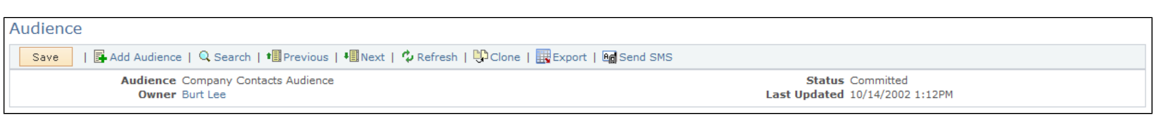
Use the Audiences page (RA_LIST_SUMMARY) to create and update audiences.

Navigation:

Marketing > **Manage Audiences**

To send an SMS message, click the **Send SMS** button on the Audience page toolbar (Marketing, Manage Audiences).

This example illustrates the fields and controls on the Audience page toolbar.



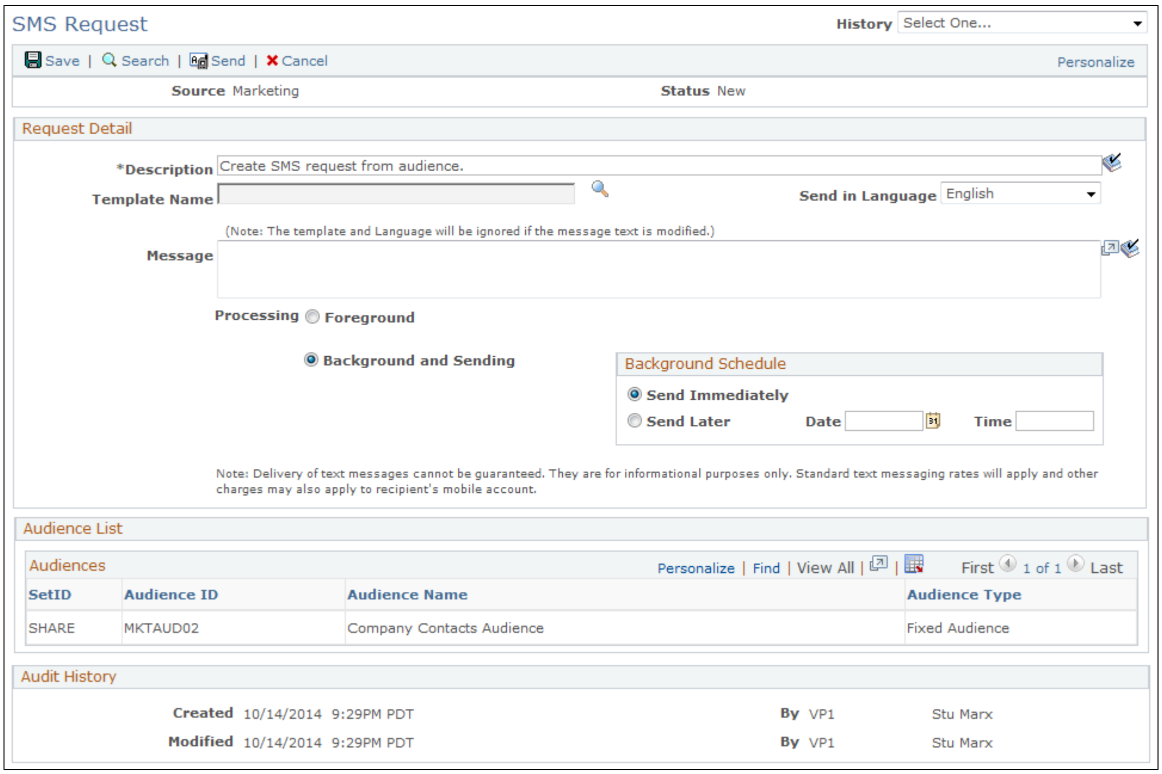
SMS Request Page

Use the SMS Request page (RB_SMS_REQUEST) to specify details about SMS messages to be sent to audiences.

Navigation:

Click the Send SMS button in the Audiences page Toolbar.

This example illustrates the fields and controls on the SMS Request page.



Using this page, you can select an SMS message template and click the **Submit** button to send the SMS message.

Field or Control	***Description***
Template Name	Select a template from the available list.
Send in Language	Specify the language in which you want the message to be sent. In order to send a message in a selected language, the message must have been defined in that language during the setup process.
Processing	Select *Foreground* or *Background.* The default is *Background.*
Background Schedule	If you specified *Background* in the **Processing** field, you can specify whether you want the SMS message to be sent immediately or at a later date and time.

Field or Control	*Description*
Audience List	The audience from which you arrived at this page is displayed in this grid. Note that audiences must be in the *Approved* or *Committed* state in order to send SMS messages to them. If the audience is in another state, an error message displays when you attempt to send the message.
History	You can return to the audience from which you reached this page by selecting its name from the History list.

See "Setting Up SMS" (PeopleSoft Online Marketing).

Chapter 8

Using PeopleSoft Marketing Workflow

Configuring the Delivered Workflow for Campaigns and Campaign Tasks

The following table shows the delivered workflow for campaigns:

Campaign Policy Name	***Trigger Point Name***	***Action Name***	***Role Name***	***Correspondence Package***	***Mode***
Campaign Status changed to *Stopped.*	After a Campaign is Saved	Worklist to Campaign Manager	Marketing Campaign RoleUser		
		TimeOut Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	Async after 5 minute delay
		Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	
Campaign Status changed to *Approved.*	After a Campaign is Saved	Worklist to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	
		Timeout Email to Marketing Manager	Marketing Campaign RoleUser		
Campaign Status Changed to *InReview*	After a Campaign is Saved	Worklist to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	
		TimeOuts to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	Async after 1 minute delay
		Worklist to Marketing Manager	Marketing Campaign RoleUser	Campaign Status Changed	

Campaign Policy Name	***Trigger Point Name***	***Action Name***	***Role Name***	***Correspondence Package***	***Mode***
Campaign Status changed to *Declined.*	After a Campaign is Saved	Worklist to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	

The following table shows the delivered workflow for campaign tasks:

Campaign Task Policy Name	***Trigger Point Name***	***Action Name***	***Role Name***	***Correspondence Package***	***Mode***
Campaign Task Status is changed to *Rejected.*	After a Campaign is Saved	Email to Campaign Task Owner	Marketing Campaign Task Owner	Campaign Task Status Changed	
		Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Task Status Changed	
Campaign Task Status is changed to *Assigned.*	After a Campaign is Saved	Email to Task Assignee	Marketing Campaign Task Assignee	Campaign Task Status Changed	
Campaign Task Status is changed to *Completed.*	After a Campaign is Saved	Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Task Status Changed	
Campaign Task Status is changed to *Over Due.*	After a Campaign is Saved	Worklist to Campaign Task Assignee	Marketing Campaign Task Assignee		
		TimeOut Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Task Status Changed	
Marketing Auto List Load	After a Campaign is Saved				

Configuring Delivered Workflow for Content and Content Tasks

The following table shows the delivered workflow for content:

Content Policy Name	***Trigger Point Name***	***Action Name***	***Role Name***	***Correspondence Package***	***Mode***
Content Status changed to *Completed.*	After a Content is Saved	Content Worklist	Marketing Content Owner		
Content Status changed to *Planning.*	After a Content is Saved	Content Email	Marketing Content Owner	Content Status Changed	
Content Status changed to *Re-Work.*	After a Content is Saved	Content Worklist	Marketing Content Owner		
		Content Email	Marketing Content Owner	Content Status Changed	
		Content Time Out	Marketing Content Owner	Content Status Changed	Async after 5 minute delay
Content Status changed to *InReview.*	After a Content is Saved	Content Worklist	Marketing Content Owner		

The following table shows the delivered workflow for content tasks:

Content Task Policy Name	***Trigger Point Name***	***Action Name***	***Role Name***	***Correspondence Package***	***Mode***
Content task status changed to *Assigned.*	After a Content is Saved	Content Task Worklist	Marketing Content Task Assignee		
		Content Task Email	Marketing Content Task Assignee	Content Task Status Change	
		Content Task Email	Marketing Content Task Assignee	Content Task Status Change	Async after 5 minute delay
Content task status changed to *Completed.*	After a Content is Saved	Content Task Worklist	Marketing Content Task Owner		
Content task status changed to *Over Due.*	After a Content is Saved	Content Task TimeOut	Marketing Content Task Assignee	Content Task Status Change	Async after 1200 minute delay

Content Task Policy Name	***Trigger Point Name***	***Action Name***	***Role Name***	***Correspondence Package***	***Mode***
Content task status changed to *Rejected.*	After a Content is Saved	Content Task Worklist	Marketing Content Task Owner		

Configuring Delivered Workflow for Offers

The following table shows the delivered workflow for offers:

Offer Policy Name	***Trigger Point Name***	***Action Name***	***Role Name***	***Correspondence Package***	***Mode***
Offer status is changed to *Planning.*	After an Offer is Saved	Offer Email to Owner	Marketing Offer Owner	Offer Status Changed	Sync
Offer status is changed to *InReview.*	After an Offer is Saved	Offer Email to Owner	Marketing Offer Owner	Offer Status Changed	Sync
		Offer Email to Owner	Marketing Offer Owner	Offer Status Changed	Async after 5 minute delay
Offer status is changed to *Completed*	After an Offer is Saved	Offer Worklist	Marketing Offer Owner	NA	Sync
Offer status is changed to *Declined.*	After an Offer is Saved	Offer Worklist	Marketing Offer Owner	NA	Sync

Chapter 9

Creating Campaigns and Activities

Understanding Campaigns and Activities

Suppose that you're about to sell a new line of commercial grade kitchen appliances. You create a marketing campaign with the primary *objective* of launching your new product. You define campaign attributes, including a budget, dates when the campaign starts and ends, and a campaign owner. You define several campaign *activities,* incorporating trade publication advertisements, direct mail, email blasts, and so on. You define concrete campaign *tasks,* such as contracting ad space and creating campaign *collateral,* including market research summaries and print advertising. You assign a *campaign team* to design and carry out the campaign; the team consists of a campaign manager, a marketing analyst, a graphic designer, a focus group coordinator, a writer, and several others. You set up a promotional *offer* of free accessories with the purchase of a new freezer during the six weeks of the campaign. You create several *audiences* of potential customers whom the campaign will target, including prior customers, readers of restaurant trade publications, and even some designers of high-end residential kitchens. You set up *metrics* to measure the campaign's effectiveness. The vice president of marketing approves the campaign, the campaign team carries it out, and you sell more new product than you ever thought possible.

This section discusses:

- Campaign structure.
- Roll ups.
- Campaign characteristics.
- Activity characteristics.

  Associate audiences, offers, collateral, and scripts with activities.
- Campaign triggers.
- Tasks associated with campaigns.
- Campaign and activity status.
- Campaign objects associated with activities.

Campaign Structure

PeopleSoft Marketing functionality is based on the concept of campaigns and activities. A marketing campaign is an initiative by a campaign team to achieve a specific marketing objective such as launching a new product, raising awareness of existing products, or cultivating customer loyalty. An activity represents action taken as part of a marketing campaign.

All standard campaigns must include at least one activity, but can include many. Multiple activities in a single campaign usually share a common marketing theme, and focus on the same product or product line. You can perform multiple activities sequentially (different activities at different times) or simultaneously (all activities at once).

Marketing Programs

The term *marketing program* refers collectively to the types of marketing campaigns that you can define. The four types of marketing programs are:

- Campaigns.
- Roll ups.
- Dialogs.
- Events.

Campaigns and roll ups are discussed in this documentation. Dialogs are discussed in the Online Marketing documentation. Events are discussed in the CRM for Higher Education documentation.

See PeopleSoft Online Marketing.

See PeopleSoft CRM for Higher Education.

Roll Ups

A *roll up* is a marketing program created to serve as a parent campaign to one or more child campaigns or dialogs. A roll up enables you to create a primary campaign with elements shared by several subcampaigns, and with reporting capabilities at the roll up level. For example, suppose that you're promoting a line of sportswear (SportTogs by PeopleGear) that is divided into three segments—children's, women's, and men's. You can create a large campaign with elements shared by all three of the smaller campaigns (such as campaign objective, campaign team members, start and end dates, and collateral), and make that large campaign your roll up campaign. Then you can define three discrete campaigns for your three market segments—children, women, and men.

Note: You designate marketing programs as roll ups so that you can establish campaign hierarchies. Marketing programs function the same, whether they are roll ups or standard campaigns. A *roll up* occupies the highest level of the PeopleSoft Marketing hierarchy and contains one or more standard *campaigns* or *dialogs.* The Marketing Program page for a roll up lists its child campaigns and dialogs, if any exist.

Campaign Characteristics

Every campaign has the following characteristics:

Term	***Definition***
Campaign objective	An effective campaign combines various marketing activities in a concerted effort to achieve one central goal, or campaign *objective.*

Term	***Definition***
Campaign team	A campaign team represents people who are responsible for or interested in the results of the campaign. A campaign team can include not only *workers* (employees), but also other *companies* and *sites*. Including someone in the campaign team enables workflow functionality. You assign the campaign team on the Plan Campaign Program or Plan Rollup Program page.
Campaign owner	The campaign owner is an employee who is responsible for the campaign. A campaign owner: • Takes responsibility for the successful design and implementation of a campaign. • Is functionally the same as any other employee. • Serves as campaign manager.

Activity Characteristics

Every activity has the following characteristics:

Term	***Definition***
Budget	The money that is allocated for the activity.
Activity Type	The tactic that you use to influence the target audience.
Marketing Channel	The medium that you use to deliver the message.
Channel Detail	A specific media outlet that you use to deliver the message.

Define activity characteristics on the Campaigns - Activity Detail page.

Activity Budgets and Costs

You can enter any amount of money as an activity budget. When you design and carry out activities, you can enter the actual costs incurred and compare those with the existing budget.

The system verifies budget amounts—it checks activity budgets within the overall budget of the campaign and checks the campaign overall budget against the roll up budget (if one exists). If any of the budgets are exceeded, the system displays a warning. As an example, assume Roll up A has two child campaigns, Campaign B and Campaign C. If the budget for Roll up A is $10,000, for Campaign B is $7,000, and for Campaign C is $5,000, a warning message appears because the total of the two child campaigns' budgets, $12,000, exceeds the $10,000 roll up budget. Likewise, if Campaign B (budget $7,000) has two activities that each have budgets of $4,000, a warning appears because the activity budgets exceed the campaign budget.

The system includes cost metrics to measure the cost effectiveness of the activities.

Note: Child programs using different currency codes can be added to roll ups—the budget of the roll up takes this into account.

Activity Type

An activity type is a tactic to influence the target audience. For example, you might use events as tactics to convey a persuasive message; your company might sponsor a concert tour in exchange for prominent placement of the company logo at concert venues; or you might announce a new service in an audio recording that plays whenever a customer calls your telephone support line. Communicating through the telephone support line is your tactic, or activity type.

Marketing Channel and Channel Detail

The term *channel* refers to how you deliver the campaign message. PeopleSoft Marketing defines the more general medium such as TV or radio as a *Marketing Channel,* while it defines the specific outlet, such as the NBC network or a local newspaper, as the *Channel Detail.*

The most commonly used marketing channel and channel detail options are predefined and delivered with the system. You can define additional marketing channels on the Marketing Channel page in setup. You can define additional channel detail on the Channels page in setup.

Associating Audiences, Offers, Collateral, and Scripts with Activities

You can associate various campaign objects with each activity for organizational and reporting purposes. While preparing and implementing a campaign activity, you can easily access those objects that you have associated with the activity. After the campaign ends, you can analyze the activity, considering the role that the associated objects played in its success.

Audience

An audience is a group of people to whom you target a marketing campaign.

Offer

An offer represents everything that you offer to customers. An offer includes the following elements and attributes:

- Product list.
- Price rules (complex or simple pricing structure that includes product discounts and giveaways).
- Dates when the offer is valid.

Collateral

Collateral (sometimes also called *content)* includes all the material that you produce to support a campaign, for use both inside and outside the organization. Examples of collateral include:

- Press kits.
- Television commercials.

- Market research summaries.

Scripts

When employees communicate with customers about campaigns, they can follow interactive scripts that you have prepared in advance.

Scripts can guide the system—and the employee—through the steps of a customer interaction. For example, when a salesperson receives a call from a customer who wants to buy a computer hard drive, a script can trigger the salesperson's system to open a web page on which hard drive information appears. Through the web page, the salesperson might be prompted to collect such information as the customer's computer type, the desired hard drive size, and so on, before the system presents a selection of hard drives for sale.

You can associate a script with each activity. The type of script is determined based on the marketing channel selected. All channels use inbound scripts as default.

Note: Only the script name, not its type (inbound or outbound) is displayed.

Term	***Definition***
Inbound	Inbound scripts guide interactions with customers who initiate contact with the company.
Outbound	Outbound scripts guide interactions with customers with whom the company initiates contact.

Note: You cannot run scripts within the PeopleSoft Marketing application. You can run them using various other PeopleSoft CRM applications.

Related Links

Understanding Audiences
Understanding Offers
Understanding Campaign Collateral
"Understanding Scripts" (Automation and Configuration Tools)

Campaign Triggers

The system can initiate campaign events at specified times or when specified conditions are met, using campaign triggers. Set up campaign triggers on the Plan Marketing Programs - Triggers page.

Trigger Schedules

Using triggers, you can initiate up to six actions:

- Execute Campaign.
- Execute Campaign Activity.

- Stop Campaign.
- Stop Campaign Activity.
- Send Notification.
- Generate Audience.

Triggers can recur for the Send Notification and Generate Audience actions, repeating the execution multiple times based on schedule and date range.

Tasks Associated with Campaigns

Campaign tasks are those activities that produce a campaign. Tasks can be any number of things including designing advertisements, distributing brochures, and polling members of the target audience. When a task is configured to do so, associating a task or changing task status can trigger workflow items.

You select tasks to add to the campaign by using the Task or Task Sets drop-down list boxes on the Program Tasks summary page. You maintain tasks on the Program Task Detail page by clicking the task name or by modifying the task data within the summary grid. You associate tasks with campaigns on the Marketing Programs - Tasks page.

Campaign and Activity Status

Campaigns and activities pass through structured life cycles. You create a campaign or activity, define its attributes, associate objects with it (collateral, audiences, channels, and so on), send it for review, execute it (if approved), complete it (unless you stop it prematurely), and archive it. At each stage in its life cycle, a campaign or activity has a *status.*

Status changes can trigger events such as notification of team members and execution or completion of related activities. Status changes must follow predefined *status rules;* you can use the status rules that are delivered with the system, or you can redefine status rules, on the Status Rules page.

Common Elements for Campaigns and Activities

Field or Control	***Description***
Clone this Campaign	Click to clone this campaign. **Note:** Cloned campaigns duplicate everything in the campaign definition except triggers and audiences.
Email	Click to email campaign information to recipients.
Calendar	Click to view the Marketing Calendar.

Field or Control	*Description*
Reporting	Click to display Interactive Reports that you can use to analyze the marketing programs.
Add Program	Click to access the Marketing Program Add page, where you can add new marketing programs.
Next	Click to display the next program in the list.
Previous	Display the previous program in the list.

Creating Campaigns

This topic discusses how to create and manage campaigns.

Pages Used to Create Campaigns

Page Name	*Definition Name*	*Usage*
Marketing Program Search Page	RA_CM_HOME_GRD	Search for marketing programs.
Marketing Programs - Program Page	RA_CAMPAIGN_DETAIL	Define new marketing campaign programs or edit existing ones.
Marketing Programs - Activities Page	RA_CMPGN_ACTIVITY	Access existing activities and attach additional activities to the campaign.
Marketing Programs - Team Page	RA_CAMPAIGN_TEAM	Specify team members for the campaign.
Marketing Programs - Trigger Page	RA_CAMPAIGN_TRIGER	View summary information about existing triggers and add new triggers.
Marketing Programs - Tasks Page	RA_CAMPAIGN_TASK	View existing campaign tasks and add new tasks.
Marketing Programs - Task Detail Page	RA_PGM_TASKDTL	Add detailed information about a campaign task.

Page Name	***Definition Name***	***Usage***
Marketing Programs - Cost Summary Page	RA_CAMPAIGN_COSTS	View all costs associated with the campaign including all activities. Costs are summarized by activity and by cost type.
Marketing Programs - Audience Page	RA_CM_LIST_SUMRY	Attach target audience lists to campaigns.
Marketing Programs - Performance Page	RA_CMPGN_METRICS	Measure the effectiveness of marketing campaigns.
Marketing Programs - Notes Page	RA_CAMPAIGN_NOTES	View descriptions of campaign notes; add new notes.
Marketing Programs - History Page	RA_CMPGN_HISTORY	View the audit and interaction information associated with the campaign.
Marketing Programs - Attributes Page	RB_ATTR_RUN_CMPG	View campaign attributes.
Marketing Calendar Page	RA_CALENDAR	View the time relationships of all campaigns.

Marketing Program Search Page

Use the Marketing Program search page (RA_CM_HOME_GRD) to search for marketing programs.

Navigation:

Marketing > **Marketing Programs**

The Marketing Program Search page displays summary information about existing campaigns. To manage an existing campaign, click the campaign name.

To add a new campaign, access the Marketing Program Add page (select the Marketing Program Add tab).

Note: The Marketing Program Search page is a configurable search page. You can configure this page to suit your personal search needs. For more details, see“Understanding the Configurable Search” (Automation and Configuration Tools)

Note: Selecting a roll up name from the **Program Roll up Name** search field returns all related campaigns and dialogs that use this roll up name as the marketing program to roll up to, and not the roll up program itself. To find the roll up program, enter the program name of the roll up or change the program type to Roll up to view all roll ups.

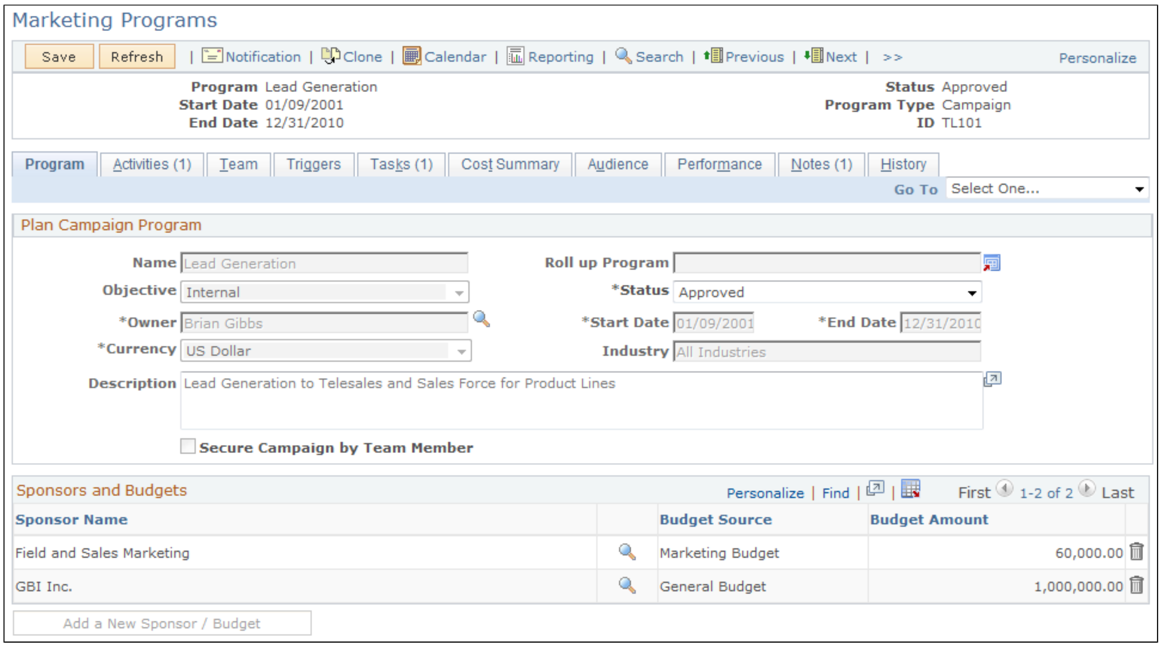
Marketing Programs - Program Page

Use the Marketing Programs - Program page (RA_CAMPAIGN_DETAIL) to define new marketing campaign programs or edit existing ones.

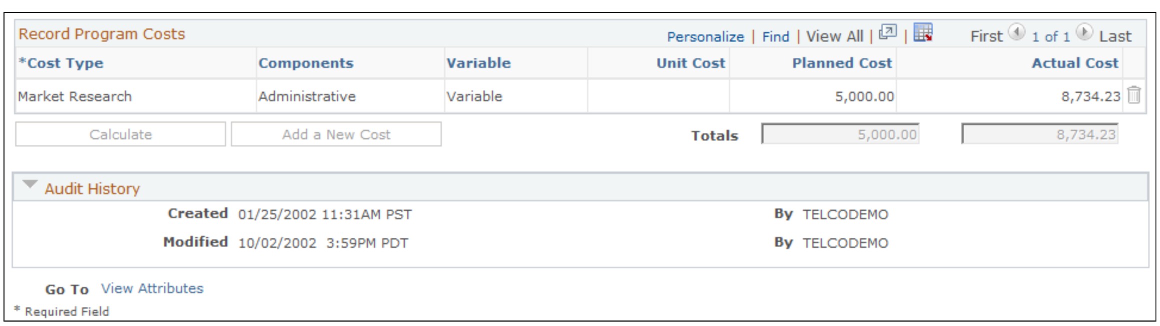
Navigation:

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

This is the first of two examples illustrating the fields and controls on the Marketing Programs - Plan Campaign Program.



This is the second of two examples illustrating the fields and controls on the Marketing Programs - Plan Campaign Program.



Plan Campaign Program

Field or Control	*Description*
Name	Enter a descriptive code to identify the campaign. **Note:** Campaign names do not need to be unique. However, duplicate campaign names might confuse users.
Roll up Program	If this campaign is part of a roll up, select the descriptive name of the parent roll up of which this campaign is a part.
Objective	Select an objective from the available options to describe what you will accomplish with this campaign.
Status	Select the position of the campaign in its life cycle. **Note:** When the campaign status is set to *Executing* or *Approved,* nothing in the definition can be changed without changing the campaign status.
Owner	Displays the descriptive name of the user who is primarily responsible for the campaign.
Start Date and End Date	Enter the date when the campaign begins and ends. Start and end dates for campaigns that are part of a roll up campaign must be within the range of the parent campaign.
Currency	Select the monetary unit with which the campaign is funded.
Industry	Select an industry group from the lookup.
Description	Enter a detailed description of the campaign.
Secure Campaign by Team Member	Select this check box to if you want a security verification process to be performed to determine if the user has authority to view the campaign. If this option is not selected, the campaign is considered to be unsecured, and all users will have access to it.

Campaign Sponsors

Campaign sponsors are persons or companies outside the department or organization who contribute to the funding of the campaign—for example, cooperative advertisers.

Note: Sponsors must exist in the system as an entity, but do not have to be specially set up as a sponsor. If the sponsor you want to add does not exist as an entity within the system, you can add company or site names using Quick Create.

Field or Control	***Description***
Sponsor Name	Select a sponsor name from the lookup table.
External	Select this check box if the sponsor is external.
Budget Source	Select the department that is funding the campaign.
Budget Amount	Enter the amount of money allocated for the campaign.
Add a New Sponsor/Budget	Click to insert another sponsor or budget source. **Note:** You can add one (and only one) budget without a name, allowing a budget amount to be entered and not associated with a particular name. (For example, if a campaign has no sponsor and its budget is 20,000.00, that budget can be entered without a name. If you enter names, you can also split that same budget across multiple named sponsors.)

Record Program Costs

The Record Program Costs section enables you to keep a record of costs not associated with any other component; that is, costs that relate to the campaign as a whole.

Warning! Do not enter the same costs twice. If you entered an expense elsewhere (for example, when you created collateral or generated an audience), do not reenter that expense here.

Field or Control	***Description***
Cost Type	Select the cost type description that uniquely identifies the main purpose of the expense.
Components	Displays the category to which the cost belongs.
Variable	Displays whether the cost type is defined as variable or fixed.

Field or Control	*Description*
Unit Cost	Enter the cost of one unit of the product or service to be measured in this cost metric. **Note:** This field is available only when the cost type is Variable.
Planned Cost	Enter the amount that you expect to pay for all units of the product or service to be measured in this cost metric.
Actual Cost	Enter the amount that you actually pay for all units of the product or service measured in this cost metric.
Totals	The sums of all planned costs and all actual costs.
Calculate	Click to calculate total values.
Add a New Cost	Click to add a new cost.

Child Programs

This section appears only if the marketing program is a roll up that contains one or more child campaigns or dialogs. Each campaign or dialog name is listed with its type, name, and budget.

Target Academic Term

This section appears only if the Higher Education option is enabled on the General Options page. Enter applicable academic information, such as institution, career and admit term for the marketing program.

Enter an admit term if you run the *Recruiting Performance* Fusion Intelligence reports off of the *CSW: Recruiting & Admissions* Interactive Dashboard.

Go To

Field or Control	*Description*
View Attributes	Click to access the Attributes page. The Attributes page displays any defined attributes associated with the campaign. When selected, the Attributes page is included in the component tab navigation until you exit this campaign and select another.

Related Links

"Understanding PeopleSoft CRM Security" (Application Fundamentals)

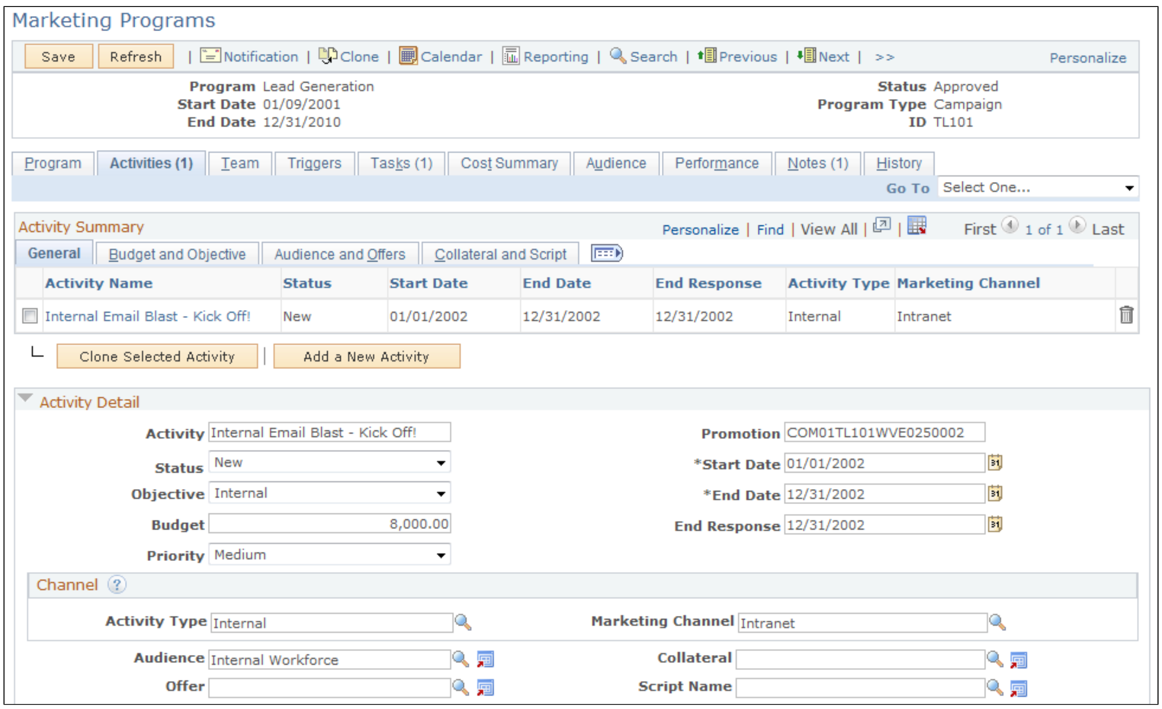
Marketing Programs - Activities Page

Use the Marketing Programs - Activities page (RA_CMPGN_ACTIVITY) to access existing activities and attach additional activities to the campaign.

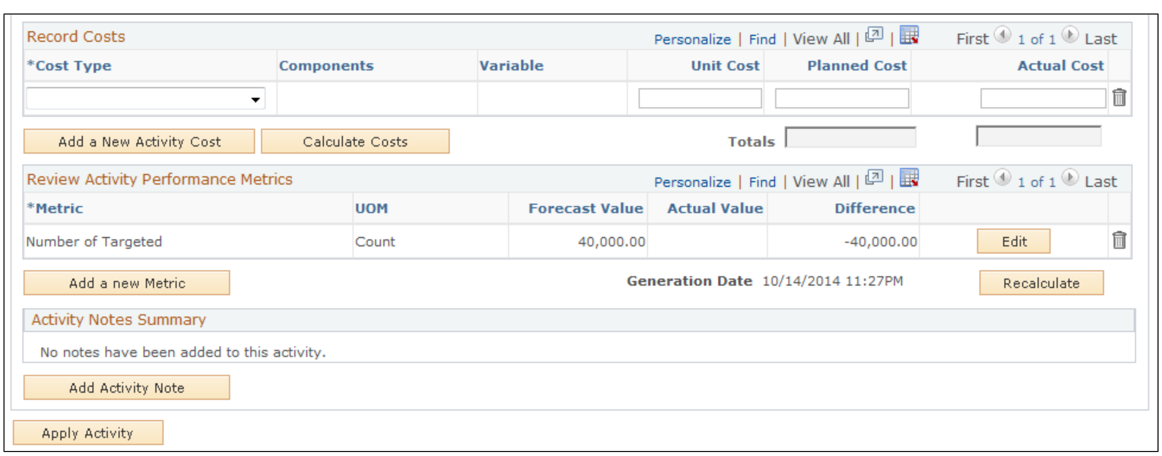
Navigation:

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

This is the first of two examples illustrating the fields and controls on the Marketing Programs - Activities page.



This is the second of two examples illustrating the fields and controls on the Marketing Programs - Activities page.



Activity Summary

Field or Control	***Description***
Activity Name	Click the activity name of a campaign to access details about the activity, where you can define additional activity attributes for the selected activity.
Add a New Activity	Click to add a new activity. **Note:** When adding a new activity, the system generates an activity name related to the name of the campaign. You can enter a new activity name.
Clone Selected Activity	Click to clone a selected activity. Select activities by selecting the check box beside the activity name. When you clone an activity, all associated costs and metrics are included, but can be edited.

Activity Detail

Field or Control	***Description***
Activity	Enter a descriptive name to identify the activity. **Note:** Activity names do not need to be unique. However, duplicate activity names might confuse users.
Promotion	A unique code that identifies the activity. This code is generated automatically. Promotion is used to integrate PeopleSoft Marketing with PeopleSoft Order Capture by associating the order with the offer that is on the activity record.
Status	Displays the position of the activity in its life cycle. **Note:** Only activities with a status of New can be deleted. Further, after an activity has been placed in Stopped status, none of its associated components (such as Offer, Audience, or Collateral) can be deleted.
Start Date and End Date	Enter the dates when the activity begins and ends. The activity start date cannot precede the campaign start date. The end date cannot exceed the campaign end date.

Field or Control	*Description*
Objective	Select the objective that describes the purpose of this activity.
Priority	Select the priority of the activity. Your priority selection determines how multiple campaign activities are sorted when used.
Budget	Enter the amount of money allocated for the activity. The system accepts standard monetary formats, such as 10,000 USD. **Note:** Establish the campaign currency on the Marketing Programs - Plan Campaign Program page (Sponsor section).
End Response	Enter a date equal to or later than the end date. The end date allows the use of the activity by Sales beyond the activity's end date, for example, to allow time for late respondents in a mass mailing activity that has already ended.

Channel

A *channel* is used to get the message to the audience. A full channel definition requires selection of both an activity and a marketing channel. Under certain circumstances, a channel detail selection is needed as well.

The fields available in this section depend on the activity and marketing channel combination selected. Not all fields are used with all combinations.

Activity, marketing channel, and channel detail values are defined in setup.

Field or Control	*Description*
Activity Type	Enter the means by which you convey the marketing message.
Marketing Channel	Enter the medium by which you convey the marketing message. For example, in a broadcast campaign you might use the channel types radio and television. Selection of the marketing channel may change the appearance of the Activities page display.
Channel Detail	This field appears only when the activity is *Broadcast* and the marketing channel is TV or Radio.

Field or Control	***Description***
Audience	If the channel execution is *Sales Force, Order Capture,* or *Mail Correspondence,* select the audience that you want to attach to the activity.
Package Name	If the channel execution is *Mail Correspondence,* select a correspondence package. Correspondence templates are created in the Correspondence setup component.
Offer	If the channel execution is *Sales Force, Order Capture,* or *Mail Correspondence,* select the offer that you want to attach to the activity.
Collateral	If the channel execution is *Sales Force, Order Capture,* or *Mail Correspondence,* select the collateral that you want to attach to the activity.
Send Date	If the channel execution is *Mail Correspondence,* this field displays the date that the message package (email or mail) was sent.
Script Name	If the channel execution is *Order Capture,* select the script to be used when the activity runs. Because different channel types have different scripts associated with them, if an activity's channel type is changed the **Script Name** field is cleared and must be reselected. **Note:** In PeopleSoft Marketing, you can associate scripts with activities for use by other PeopleSoft applications, but you cannot run scripts.

See “Correspondence and Notifications” (Automation and Configuration Tools).

Description for Sales Team

This section displays descriptive information about the activity to give Sales users details about the originating campaign so that they can make good decisions about the processing of generated leads and their resultant opportunities. Note that this information appears only if the marketing channel is a sales agent.

If neither of these two conditions is met, then the fields described in this section do not appear.

Note: A marketing activity cannot be moved to *Approved* status if either of the fields in this section are left blank.

Field or Control	*Description*
Summary	Because sales users do not always understand the marketing jargon used in the marketing-oriented activity description, this field gives the campaign or marketing manager a place to include a description more tailored to the sales user's needs to aid the user in operating on the lead within proper context.
Call To Action	Specify appropriate follow-up actions to help the sales user correctly interpret and convert the generated lead.

See PeopleSoft Sales.

Record Costs

Enter costs associated with the activity that are not included elsewhere. Selection of collateral or an audience that has an associated cost record propagates those costs into the campaign activity.

Field or Control	*Description*
Cost Type	Select the cost type description that uniquely identifies the main purpose of the expense.
Components	Displays the category to which the cost belongs.
Variable	Displays whether the cost type is defined as variable or fixed.
Unit Cost	Enter the cost of one unit of the product or service to be measured in this cost metric. **Note:** This field is editable only when the cost type is Variable.
Planned Cost	Enter the amount that you expect to pay for all units of the product or service to be measured in this cost metric.
Actual Cost	Enter the amount that you actually pay for all units of the product or service measured in this cost metric.
Totals	The sum of all planned costs and the sum of all actual costs.
Calculate	Click to calculate total values.
Add a New Activity Cost	Click to add a new cost.

See Defining Cost Elements.

Review Activity Performance Metrics

Select the terms by which to measure campaign performance.

Field or Control	***Description***
Metric	Select the metric by which to measure activity performance.
UOM (unit of measure)	Displays the unit of measure in which the metric is calculated.
Forecast Value	Enter the result that you expect the activity to produce.
Actual Value	Displays the result that the activity actually produces. The system populates this field with data from various tables and sometimes from multiple applications (such as PeopleSoft Sales and PeopleSoft Call Center).
Difference	Displays any difference between the forecast and actual values. Over expenditures appear as a negative number.
Add a New Activity Metric	Click to add additional activity metrics.
Recalculate	Recalculates all attached metrics. **Note:** All existing metrics are calculated when you access the Activity Detail page for the first time.

See Defining and Creating Metrics.

Activity Notes Summary

This section contains a list of any notes that have been associated with the activity. An **Add Activity Note** button on the main activity page enables you to create additional notes to associate with the activity. Activity notes can include attachments.

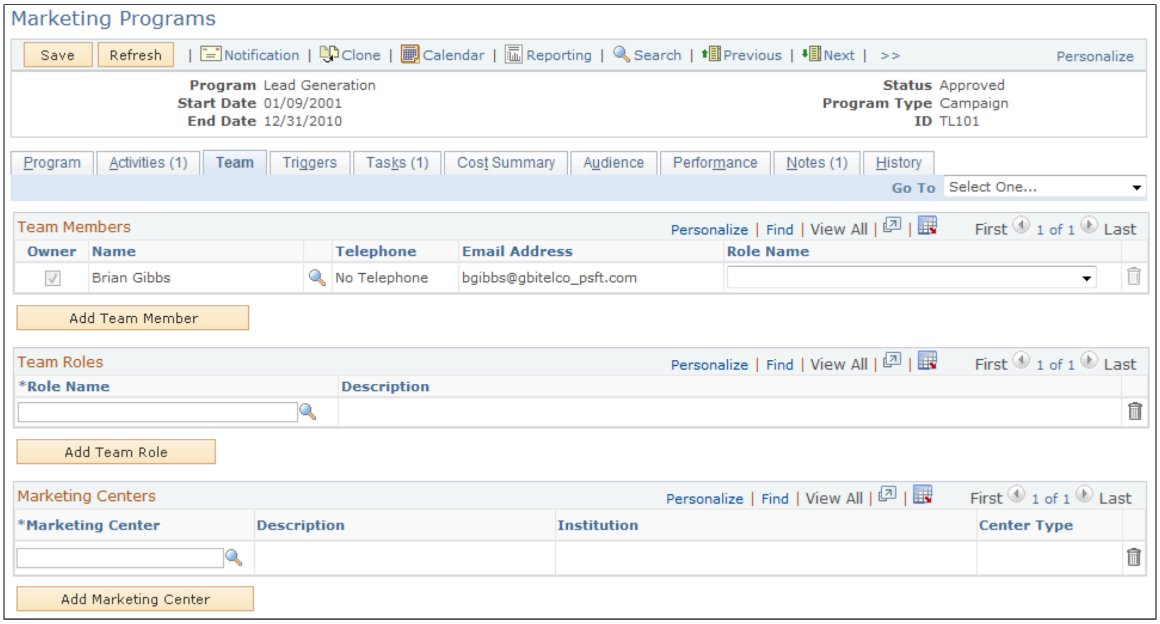
Marketing Programs - Team Page

Use the Marketing Programs - Team page (RA_CAMPAIGN_TEAM) to specify team members for the campaign.

Navigation:

Marketing, Marketing Programs, Team

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



Field or Control	***Description***
Owner	This check box is automatically selected for the owner of the campaign.
Name	Select the name of each person included in the campaign team from the lookup table. Phone and Email information appears when available. **Note:** Team members must exist in the system as an entity. If the team member whom you want to add does not exist as an entity within the system, you can add company or site names using Quick Create.
Add a Team Member	Click to enter additional team members.
Team Role	Select a role for each person on the team. Only persons with valid user IDs can have a role. Based on their team role, team members can also receive notification of campaign events. For example, a campaign manager can receive an email notice whenever a campaign is submitted for review or a worklist note whenever an activity is stopped prematurely.
Add Team Role	Click to enter additional team roles.
Marketing Center	You can select a Marketing Center from the available list if any have been defined for the campaign.
Add Marketing Center	Click this button to add a Marketing Center to the campaign.

Delivered Team Roles

The following campaign team roles are delivered:

Role	***Description***
Marketing Manager	• Manages the design and execution of campaigns. • Determines campaign resources needs. • Manages contact strategies. • Approves campaigns. • Selects campaign channels. • Approves promotional offers. • Oversees campaign budgets. • Manages relationships with the managers of campaign channels (newspaper publishers, web primarys, and so on). • Evaluates and fine-tunes campaigns in progress.
Campaign Manager	• Supervises campaign teams. • Creates promotional offers. • Manages detailed planning and execution of one or several campaigns. • Assigns specific tasks to campaign team members. • Coordinates activities with other campaign managers. • Evaluates campaigns in progress and suggests changes to the marketing manager. • Establishes campaign budgets.
Marketing Analyst	• Defines, analyzes, and manages target audience lists. • Maintains understanding of applications, including PeopleSoft Marketing. • Helps create campaign hierarchies. • Manages campaign elements, including audiences, offers, and collateral. • Generates and analyzes campaign performance reports.

Role	***Description***
Marketing Researcher	• Performs exploratory analysis of marketing campaigns and target audience lists. • Analyzes customer affinities and behaviors. • Builds and manages predictive models for targeting audiences. • Runs marketing optimization programs. • Acts as liaison to the IT department.
Marketing Creative	• Creates campaign collateral. • Manages relationships with ad agencies or an internal ad group. • Manages the relationship with the fulfillment shop.
Marketing App Administrator (marketing application administrator)	• Creates user profiles. • Sets up user security and roles. • Defines marketing channels. • Defines campaign objectives.

Marketing Programs and Marketing Security

The Marketing Centers grid appears on the Team tab of the Marketing Programs component.

In order to secure a marketing program, you must select the Secure check box, which appears on the Program tab of the Marketing Programs component.

When searching for Marketing Programs that might be secured, the search displays only those Marketing Programs that the user performing the search is authorized to access. Because the Marketing search can also include the program type of Dialog, the search also checks secured dialogs for Marketing Center authorization.

If a secured child campaign is associated to a roll up, all campaigns are automatically copied over from the roll up to the secured child campaign. If a campaign is unsecured and a roll up is selected, Marketing Centers from the roll up are not copied to the campaign.

When a Marketing Center is added or deleted on a roll up, then the changes are propagated to all the secured child campaigns associated to the roll up. However, when adding or deleting Marketing Centers on a secured child campaign, changes are not propagated from the child to the parent roll up. This is because multiple child campaigns can be associated with a roll up, and users might want to assign different Marketing Centers for each campaign. Specific requirements are as follows:

- If a campaign is secured and you select a roll up, the system displays a warning message informing you that Marketing Centers from the selected roll up will be copied over when the campaign is saved, and reminding you to review Marketing Centers that might have been copied from a prior roll up if the campaign was previously associated to another roll up.
- When a save occurs, all Marketing Centers from the roll up that do not already exist on the secured child campaign will be copied over.
- When adding new Marketing Centers to a roll up, upon a save the new Marketing Centers are added to all secured child campaigns that do not already exist on the child campaigns.
- When deleting Marketing Centers from a roll up, upon a save the deleted Marketing Centers will be removed from all secured child campaigns.
- If a secured child campaign that has been previously linked to a roll up is modified by associating it to another roll up, then upon a save all Marketing Centers from the newly linked roll up are copied over to the child campaign if they do not already exist. The user decides whether to manually delete any Marketing Centers that might have been copied over from a prior roll up.

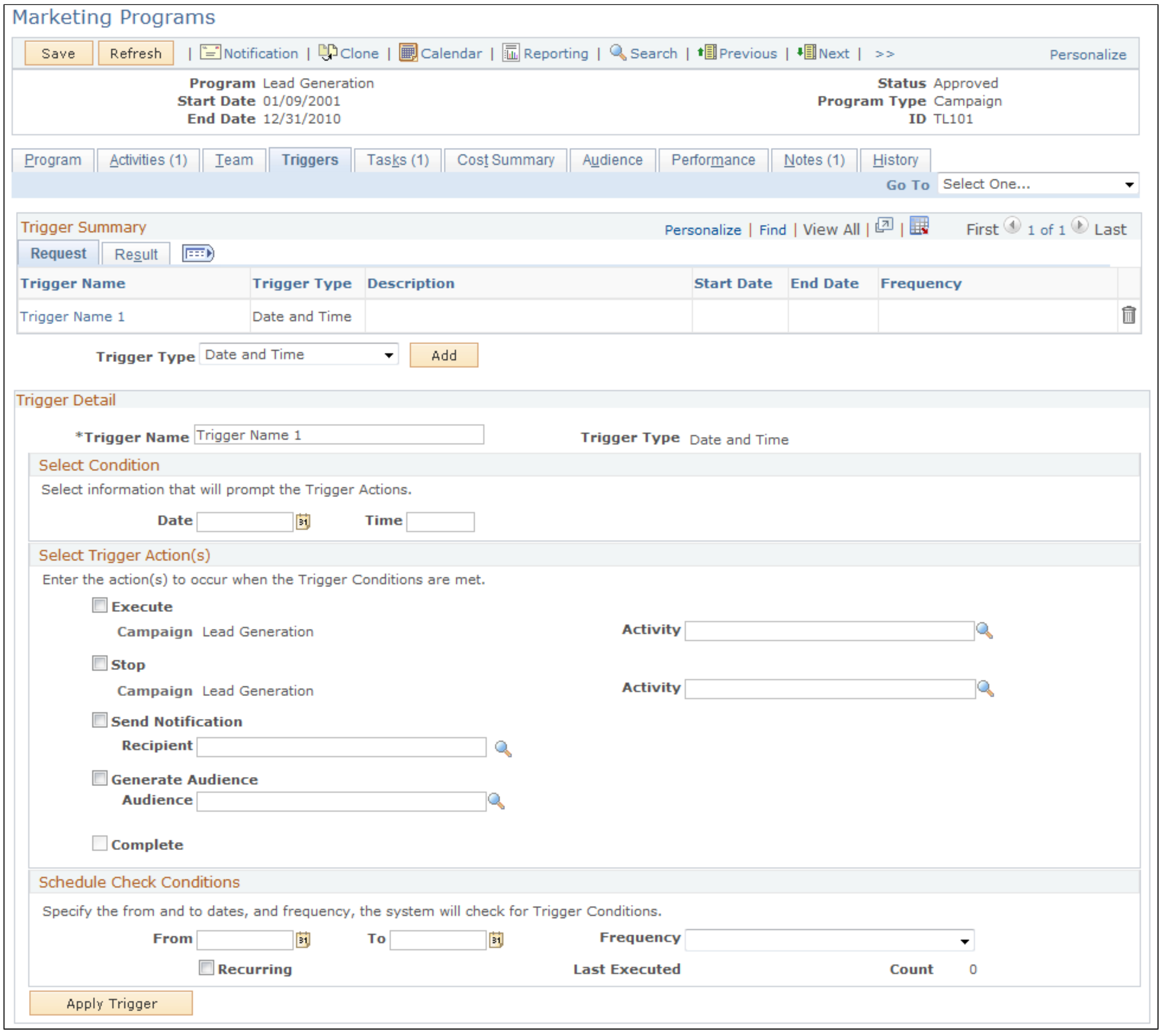
Marketing Programs - Trigger Page

Use the Marketing Programs - Triggers page (RA_CAMPAIGN_TRIGER) to view summary information about existing triggers and add new triggers.

Navigation:

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

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



Understanding Triggers

The system can initiate campaign events on the currently-viewed campaign at specified times or when specified conditions are met, by using campaign triggers. Use triggers to run or stop the campaign or activity at a certain point in time or when another campaign or activity attains a certain condition. Also, use triggers to send notifications or generate an audience at specified points. One example of how a trigger can be used is to launch a series of activities within a campaign.

Note: You can only stop or run the campaign currently being viewed; likewise, only activities associated with that campaign can be stopped or run. You cannot select another campaign.

Suppose that you have a campaign with two activities. The objective of this campaign is to move the best standard credit card customers up to the premium card service, and the two activities include a mailed postcard and a mailed letter with brochure. When you define the campaign, you define two triggers, one for each activity.

The purpose of the first trigger is to launch the postcard activity on a certain date. To accomplish this, you create a *Date and Time* trigger and have it *run* the postcard activity, *send notification* to a team member telling her to mail the postcards, and *generate an audience* to receive the cards.

The purpose of the second trigger is to launch the letter and brochure activity sixty days after the postcards are mailed. Again, you create a *Date and Time* trigger with the same trigger actions reflecting the new activity and a new audience based on results of the postcard activity.

Note: A trigger can be deleted until it has finished.

Trigger Summary

Access an existing trigger by clicking on the trigger name within the trigger summary grid.

Field or Control	*Description*
Trigger Type	Select a trigger type. The trigger type determines when the system runs action requests and controls the field display on the Trigger Detail page. Values are: *Date and Time:* The system initiates campaign events on specified dates and times. *Metric to Metric:* The system initiates campaign events when two metric results align as defined. *Metric to Value:* The system initiates campaign events when a metric result matches a fixed amount.
Add	Click to add the selected trigger type.

Trigger Detail

This group box shows the detailed information for a trigger that you click in the summary grid or for a trigger that you are creating after clicking the Add button.

Field or Control	*Description*
Trigger Name	Enter a descriptive name for the trigger.
Trigger Type	Displays the trigger type that you selected on the Marketing Programs - Trigger Summary page. Depending on the trigger type selection, different fields appear in the rest of the **Select Condition** region.

Select Condition Group Box

The trigger type selected determines the fields that appear in the **Select Condition** group box. The following table lists the fields that appear with each trigger type.

Trigger Type	***Select Condition***
Date and Time	• **Date** • **Time**
Metric to Metric	• **Metric One** • **Campaign One** • **Activity One** • **Operator** • **Metric Two** • **Campaign Two** • **Activity Two**
Metric to Value	• **Metric** • **Campaign** • **Activity** • **Operator** • **Value**

The system displays some combination of the following fields, based on the trigger type that you select.

Field or Control	***Description***
Date	Select the date when the system is to run the trigger. **Note:** The system displays this field only when you select the trigger type *Date and Time.*
Time	Enter the time when the system is to run the trigger. The system recognizes standard time formats, for example, 2:30 p. m. or 02:30 PM or 14:30. **Note:** The system displays this field only when you select the trigger type *Date and Time.*

Field or Control	*Description*
Metric, Metric One, Metric Two	Select a performance metric to apply against a corresponding campaign or activity. **Metric One** and **Metric Two** labels indicate that the metric is applied against the campaign or activity with the same designation.
Campaign One, Campaign Two	Select a campaign against which you want to apply the metric. Selection of a campaign is required. Condition metrics may be applied against any running campaign.
Campaign	This field displays the name of the current campaign.
Activity, Activity One, Activity Two	Select an optional activity within the specified campaign. When an activity is specified, the metric applies only against that activity and no others within the campaign.
Operator	Select the operator by which to compare two metric results, or a metric against a fixed value. Operator values are: • *Equal to* • *Greater than* • *Greater than or Equal to* • *Less than* • *Less than or Equal to* • *Not Equal to* **Note:** The following four operators are reserved for future use: *Divide, Minus, Multiply,* and *Plus.*
Value	Enter a fixed value against which the metric result is compared. **Note:** The system displays this field only when you select the trigger type *Metric to Value.*

Select Trigger Actions Group Box

Field or Control	***Description***
Execute	Select to run an activity within the current campaign when the trigger condition is true. Execute actions apply only to the campaign activity and not to the campaign itself.
Stop	Select to stop a campaign, or an activity within the campaign, when the trigger condition is true. If no activity is selected, the stop action applies to the campaign.
Send Notification	Select to notify a person when the trigger condition is true. Select the person to notify in the **Send Notification** field.
Generate Audience	Select to generate an audience when the trigger condition is true. Select the audience to generate in the **Generate Audience** field. Schedule the Audience Generation Application Engine program to be run by the processor to generate the audience.
Result	After the system attempts to run a trigger—whether successfully or unsuccessfully—it displays a result message. If the trigger execution attempt is unsuccessful, the result message indicates the nature of the failure.

Schedule Check Conditions

If you select either the *Metric to Metric* or the *Metric to Value* trigger type, schedule intervals of time that determine when the system checks those campaign conditions. For example, the system could check campaign conditions every day, every two weeks, or every four months. Establish trigger schedules on the Campaign Trigger Schedules page.

Field or Control	***Description***
From and To	Enter start and end dates and times between which the system checks for trigger conditions.
Frequency	Select the schedule that determines how frequently the system checks whether trigger conditions have been met.
Start Date and End Date	Enter dates when the system begins and stops checking whether trigger conditions have been met.

Field or Control	Description
Recurring	Select this check box if you want the trigger to recur. **Note:** Recurring triggers generate an error if the EXEC or STOP action is requested and **Recurring** is selected.

Related Links

Trigger Schedules Page

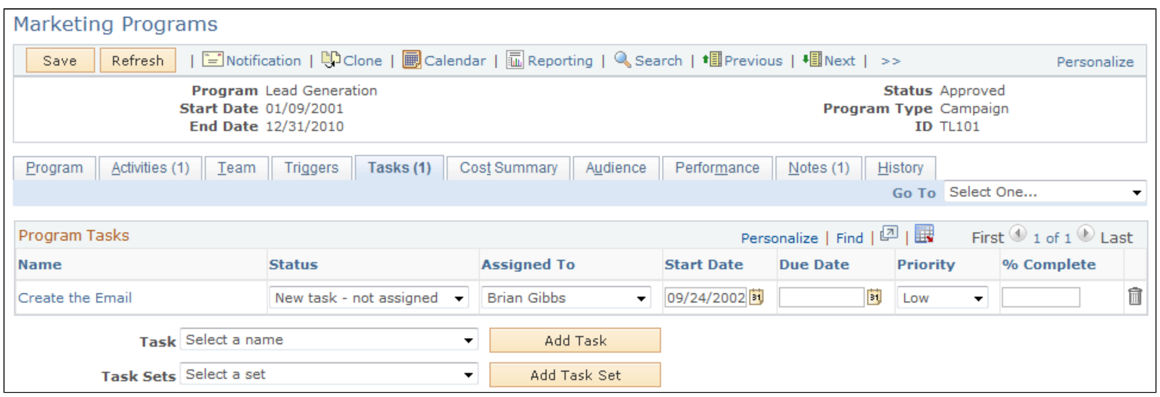
Marketing Programs - Tasks Page

Use the Marketing Programs - Tasks page (RA_CAMPAIGN_TASK) to view existing campaign tasks and add new tasks.

Navigation:

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

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



Throughout the course of a marketing campaign, various tasks may need to be accomplished. These tasks can include things such as creating advertising and collateral materials, contracting for ad space and purchasing media time, or generating a target audience. Tasks are associated with a campaign and assigned to appropriate team members as a reminder to do a certain thing at a certain time. When a task is assigned to a campaign team member, a notification is added to her worklist when she is to perform the task.

The Marketing Programs - Tasks page displays any existing tasks and enables you to add new tasks. To access an existing task, click the task name within the **Campaign Tasks** grid.

You use task sets to group individual tasks and add them as a group. For example, when you create a campaign, three tasks always need to be added: Create Collateral, Create Metrics, and Create Offer. Rather than selecting each task individually, you can create a task set (perhaps called Always Add 3) and include the three tasks within the task set. Next time you create a campaign, you can select the Always Add 3 task set, eliminating the need to add the tasks one at a time.

Field or Control	***Description***
Task	Select a predefined **Task Shell** from the available list. To create a new task, select *Create a New Task*and define the new task as required. Otherwise, select a predefined task shell and modify it if necessary. Click **Add** to access the Marketing Program Tasks - Campaign Task Detail page, where you can define a new task or modify an existing one.
Task Sets	Select a previously defined task set from the available list. Selecting a task set automatically displays the single tasks in the set. Selecting another task set refreshes the display, and setting the value back to the default or adding the task set clears the display. Use task sets as defined or modify as necessary. Click **Add** to add all tasks in a task set. View details about each task by clicking the task name. Eliminate individual tasks by deleting them from the list.

Related Links

Defining Task Tools

Marketing Programs - Task Detail Page

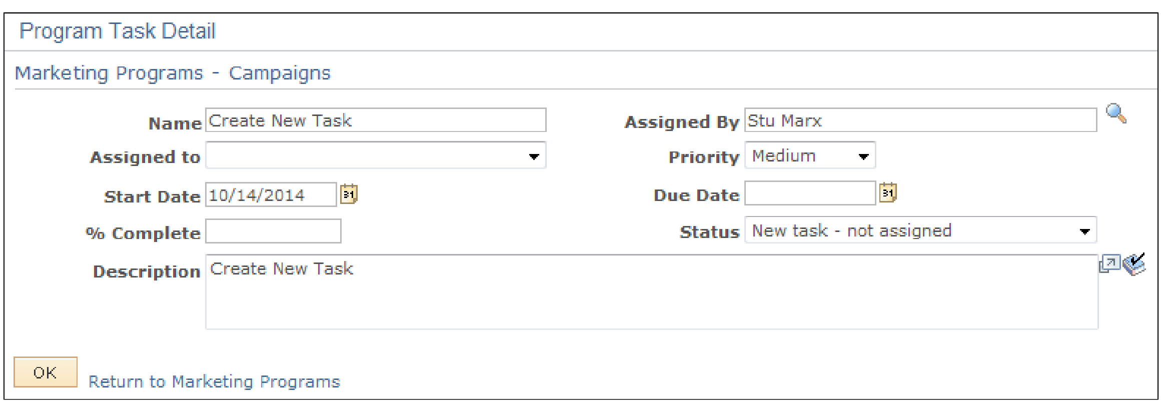
Use the Marketing Programs - Task Detail page (RA_PGM_TASKDTL) to add detailed information about a campaign task.

Navigation:

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

Click the **Add Task** button.

This example illustrates the fields and controls on the Task Detail page.



Field or Control	***Description***
Name	Enter a name for the task, or leave the shell default name.

Field or Control	***Description***
Assigned By	The system automatically assigns the current user to this position. You can change this to any worker.
Assigned to	Select a user to run the task. The user must be a member of the campaign team. Save the campaign to activate the task assignment. **Note:** The system does not permit you to assign a task to a person who is not a member of the campaign team.
Start Date	Enter a date on which the task is to begin. On this date, a notification is added to the worklist of the team members assigned to the task.
Due Date	Enter a date on which the task is to be complete. This due date is compared against the **% Complete** field. If the task is not 100 percent complete by the due date, a workflow process sends notifications (when defined).
Priority	Select the urgency of the task. This information is for the benefit of the user, only. No logic is attached to priority values. The values are: • *High* • *Medium* • *Low*
Status	Select the position of the task in its life cycle. When the status is changed to *Completed,* the due date is changed to the current date and the **% Complete** value is changed to *100.*
% Complete (percent complete)	Enter the percentage portion of the task that is complete. When this value is changed to *100,* the due date is changed to the current date and the status is changed to *Completed.*
Description	Enter a description of the task, or leave the shell default description.

Marketing Programs - Cost Summary Page

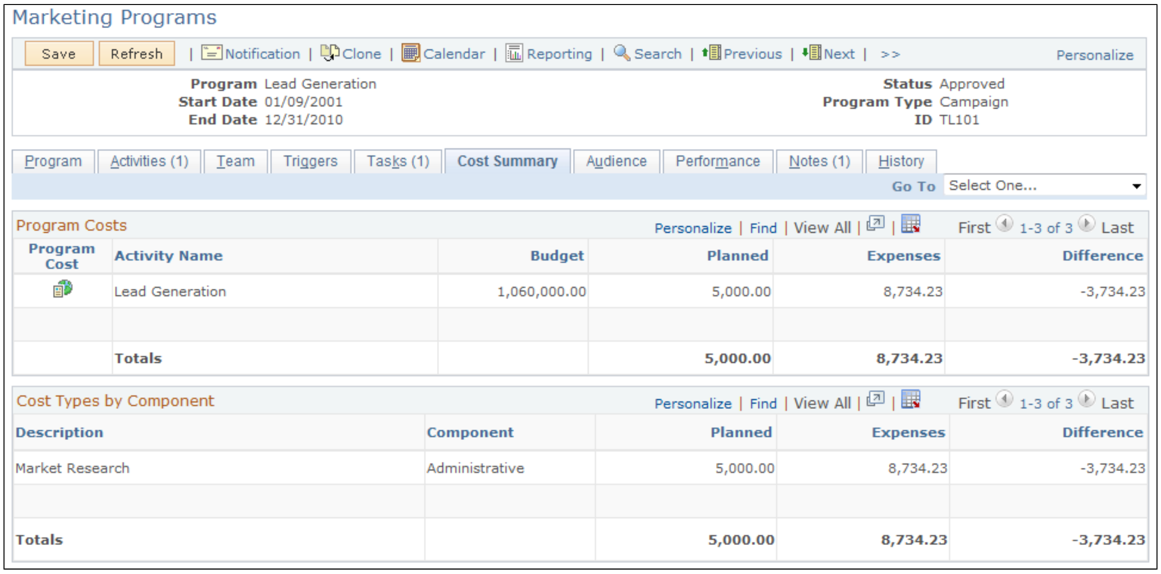
Use the Marketing Programs - Cost Summary page (RA_CAMPAIGN_COSTS) to view all costs associated with the campaign including all activities.

Costs are summarized by activity and by cost type. For roll up campaigns, all child costs (for associated campaigns, activities, and dialogs) are also displayed.

Navigation:

Marketing > **Marketing Programs** > **Cost Summary**

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



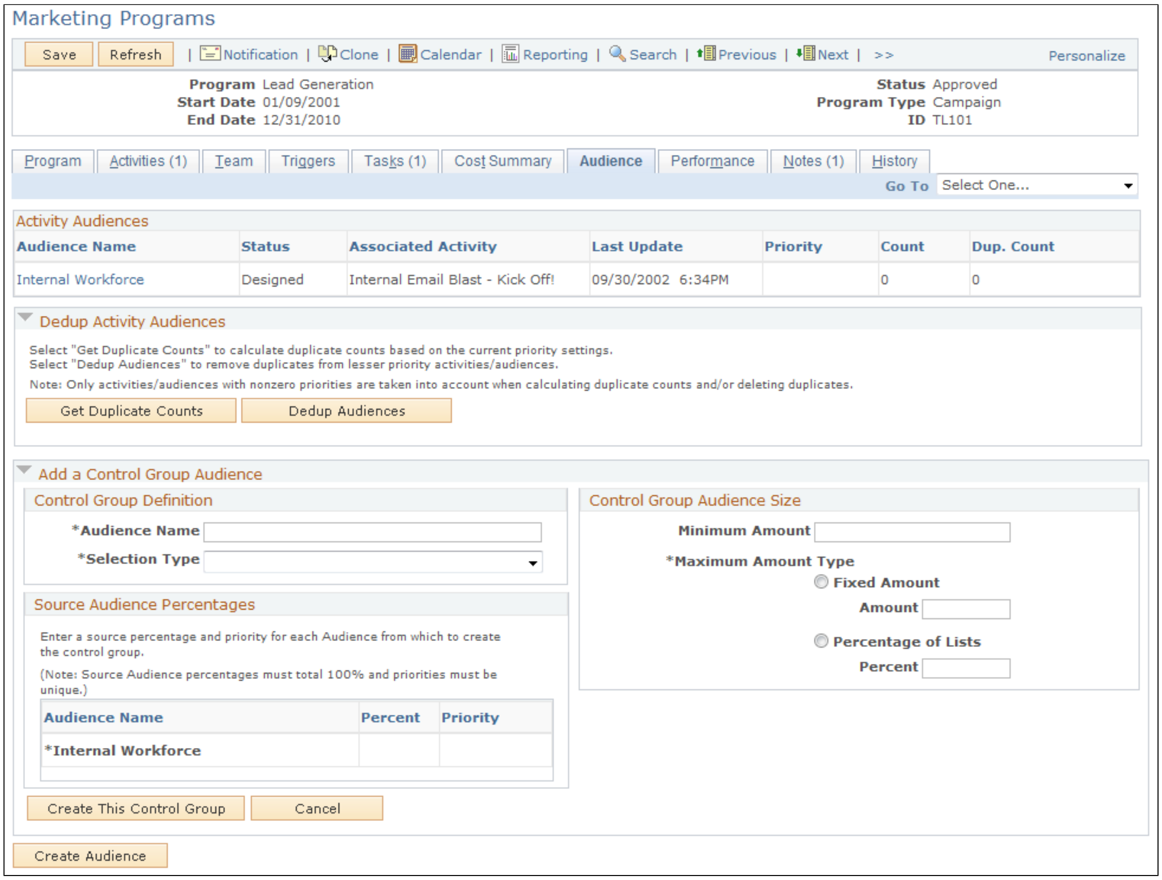
Marketing Programs - Audience Page

Use the Marketing Programs - Audience page (RA_CM_LIST_SUMRY) to attach target audience lists to campaigns.

Navigation:

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

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



Audiences are associated with campaigns through the campaign activities. The Marketing Programs - Audience page enables you to see all audiences that are associated with the campaign through all activities. Additionally, the Marketing Programs - Audiences page enables you to run deduplication processes and create one or more control groups.

Activity Audiences

The **Activity Audiences** group box displays information about all audiences associated with the campaign. Information displayed about each audience includes the name of the audience, audience status, the activity to which the audience is attached, the date on which the audience was last updated, and the priority value of the audience.

Field or Control	***Description***
Count	The total count of records in the audience.
Dup. Count (duplicate count)	A count of the number of records that are duplicated in other audiences associated with the campaign.

Note: The system calculates duplication counts only for those audiences for which you have defined priority numbers greater than zero.

Dedup Activity Audiences

Depending on the campaign strategy, you may want to eliminate duplicated records from the audiences to prevent prospects from being contacted more than once. For example, suppose you have a campaign with two activities. The first activity targets all customers identified having an interest in golf. The second activity targets all females who live in Georgia. Since Jane Smith loves golf and lives in Georgia, her name appears on both lists. As marketing manager, you determine that the golf lover's activity takes priority over the activity that targets women in Georgia. When you deduplicate the audiences, you eliminate Jane Smith's name from the Georgia women's activity and retain it on the golf lover's activity.

In some cases, however, the activities are designed for the purpose of contacting prospects multiple times through different methods. In this case, do not eliminate duplicated records.

Note: Only fixed audiences in approved status can be deduplicated.

Field or Control	***Description***
Get Duplicate Counts	Click to run a process to determine how many duplicated records exist in each audience. The process is scheduled to run immediately. How long it takes to complete the process depends on the size of the list and other processor activity.
Dedup Audiences (deduplicate audiences)	Click to run a process to eliminate duplicated records. Records in the audience with the highest priority value remain as the original record. Duplicated records in all audiences with a lower priority value are eliminated. The process is scheduled to run immediately. How long it takes to complete the process depends on the size of the list and other processor activity.
Priority	Enter a priority value to determine which records the system removes. The system removes lower-priority duplicates before higher-priority duplicates. Indicate the relative priority of the audiences by giving numerically higher numbers to lower-priority audiences. For example, an audience with a priority number of 99 is of lower priority than an audience with a priority number of 30. To prevent an audience from being modified, enter a priority value of zero (0). **Note:** This field can be edited only if the audience is approved or if it is a fixed audience.

Add a Control Group Audience

Control groups help you gauge the effectiveness of the campaign by isolating a small segment of the target audience. By comparing sales results of the larger audience to those of the control group, you can determine the actual influence of the campaign.

How control group members are drawn from each included audience is controlled by a combination of the control group audience size and source audience percentages. Source audience percentages determine the percent of the total control group members who are drawn from each audience. The control group audience size determines the total number of control group members. For example, suppose the campaign includes the following three audiences (all record counts are unduplicated); Audience 1 with 900 records, Audience 2 with 750 records, and Audience 3 with 1,800 records. If you create a control group of five percent of the audience (total 172), and specify the source audience percentages as 33 percent, 33 percent, and 34 percent respectively, 56 records will be drawn from Audience 1, 56 from Audience 2, and the remaining 60 from Audience 3.

Field or Control	***Description***
Audience Name	Enter a descriptive name for the control group audience.
Selection Type	Select the manner in which the system selects specific records and people to place in control groups. Select *Every Nth* to select records by an even distribution method. For example, for a control group consisting of five percent of the total audience, every 20^{th} record is selected. Select *Random* to select records on a random basis. **Note:** The method used to randomly select records is not meant to produce a statistically valid random sample.
Minimum Amount	Enter the smallest control group size that you consider acceptable. If the actual amount yielded by the selection process is less than the minimum, the process fails. The newly created control group audience is set to a status of *Designed* rather than *Generated* and a note is entered in the log indicating the reason.
Maximum Amount Type	Select the manner in which the maximum size of the control group is determined. Select **Fixed Amount** to specify an actual maximum number. Enter the maximum number. Select **Percentage of Lists** to determine the control group count as a percentage of the combined audience total. Enter the percentage of the total number of control group members to draw from each of the audiences. The total percentage must equal 100. To prevent control group members from being selected from a particular audience, enter zero as a source percentage for that audience. **Note:** You can draw control group members only from fixed audiences that have the status *Approved.*

Field or Control	***Description***
Create This Control Group	Click to generate a control group. The control group creation process is scheduled and run immediately.
Cancel	Click to cancel the control group definition before creating it. After you click the **Create This Control Group** button, the process cannot be canceled.

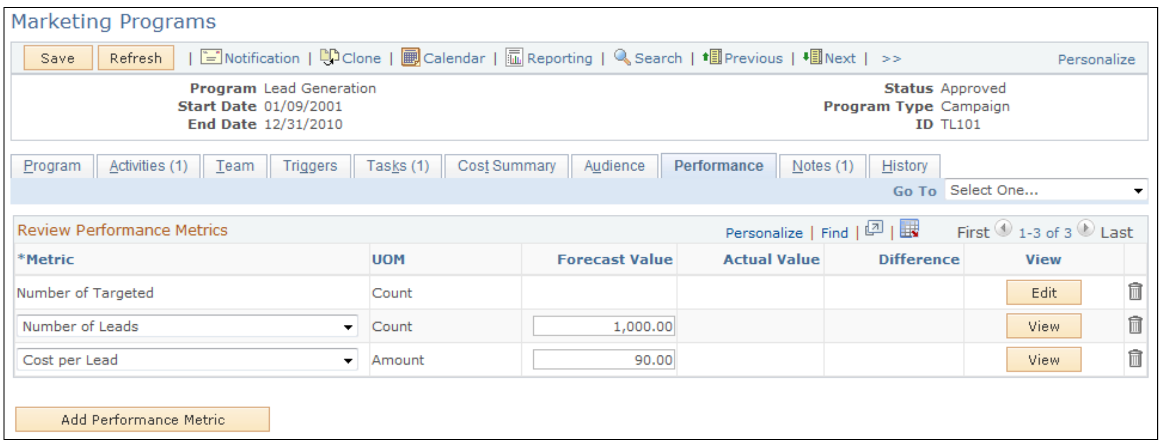
Marketing Programs - Performance Page

Use the Marketing Programs - Performance page (RA_CMPGN_METRICS) to measure the effectiveness of marketing campaigns.

Navigation:

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

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



Review Campaign Performance Metrics

The grid displays information about any metrics attached to the campaign. All existing metrics are calculated when you enter the page.

To add a new metric, click the **Add a New Activity Metric** button.

Field or Control	***Description***
Metric	Select to measure campaign performance.
UOM (unit of measure)	Displays the unit of measure associated with the selected metric.

Field or Control	*Description*
Forecast Value	Enter the result that you expect.
Actual Value	Displays the actual result. This field is populated with data from various tables and sometimes from multiple applications (such as PeopleSoft Sales).
Difference	Displays the difference between the forecast and actual values.
Edit or **View**	Click the **Edit** button to edit an existing metric. Click the **View** button to return the display to the view mode. **Note:** Only one metric can be edited at a time. No metric changes are effective until the page is saved.
Delete	Click to delete an existing metric.
Add a New Performance Metric	Click to add a new metric to the existing list.

Marketing Programs - Notes Page

Use the Marketing Programs - Notes page (RA_CAMPAIGN_NOTES) to view descriptions of campaign notes; add new notes.

Navigation:

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

Use this page to view existing notes and attachments, to send email messages, or to add new notes.

You can add a note to a campaign, activity, task, content item, content task, or offer.

See “Understanding Notes and Attachments” (Application Fundamentals).

Marketing Programs - History Page

Use the Marketing Programs - History page (RA_CMPGN_HISTORY) to view the audit and interaction information associated with the campaign.

Navigation:

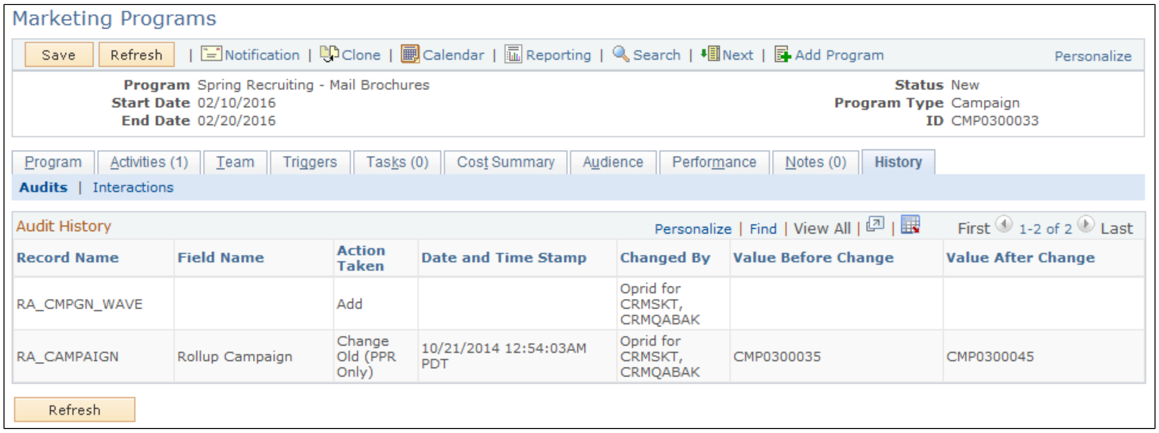
Marketing > **Marketing Programs** > **History**

Use this page to view audit and interaction information about the campaign.

Viewing Audit Information

To view information about changes to the campaign, click the **Audit** link.

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



Viewing Interaction Information

To view the email notification interaction records for the marketing campaign, click the **Interactions** link.

You can click the record's icon to transfer to the appropriate 360-degree view for the interaction.

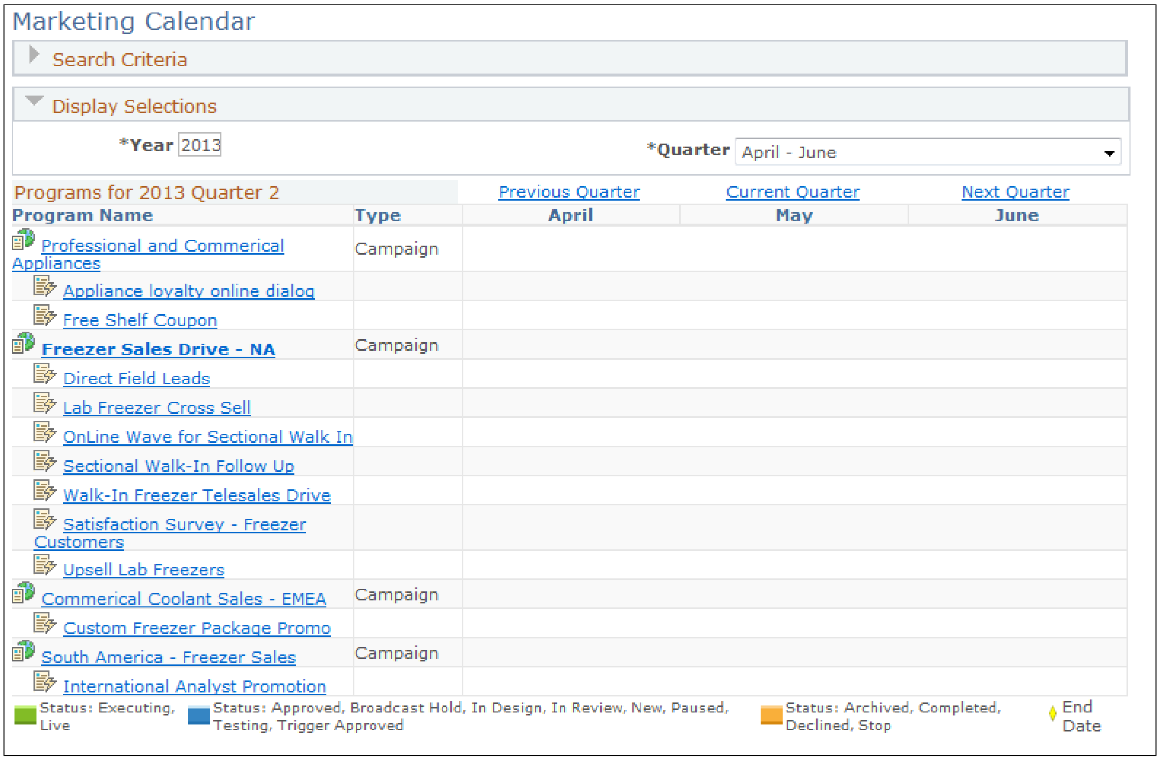
Marketing Calendar Page

Use the Marketing Calendar page (RA_CALENDAR) to view the time relationships of all campaigns.

Navigation:

Click the **Marketing Calendar** button on the Marketing Programs component.

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



The Marketing Calendar page displays the status and schedule relationship of all campaigns and activities that meet the search criteria that you define (business unit, year, and quarter are required). Schedules are displayed graphically, showing the start and end dates of the campaign at each level of the hierarchy: roll up, campaign or dialog, and activity. Campaigns within a roll up campaign are displayed relative to the parent campaign, and activities within each child campaign are displayed relative to the child campaign.

Creating Sales Leads

PeopleSoft Marketing enables you to create leads for PeopleSoft Sales. You can create leads either automatically or manually. The automatic process is delivered enabled with the system and generates leads whenever certain conditions exist. The manual process is available at any point.

This topic discusses how to generate sales automatically and manually.

Pages Used to Create Sales Leads

Page Name	***Definition Name***	***Usage***
Create Leads Page	RA_CREATE_LEADS	Turn campaign audiences into sales leads.
View Audience Page	RA_VIEW_WAVE_LIST	View the created audience.

Page Name	***Definition Name***	***Usage***
Leads Creation Status Page	RA_CREATE_LEAD_STA	Confirm results of the creation process.

Generating Sales Leads Automatically

PeopleSoft Marketing is delivered with an Active Analytics Framework term that automatically generates leads from a campaign activity audience for PeopleSoft Sales. The term (Marketing Auto List Load)is delivered enabled and can be disabled if you choose. To disable the term:

1. Select **Enterprise Components, Active Analytics Framework, Policies, Manage Policies.**
2. On the search page, select **Marketing Campaign** for the context name and click **Search.**
3. Click **Marketing Auto List Load** for the desired setID.

   Note: In some cases, the term is named CSS: Marketing Auto List Load.

4. Click the **Modify System Data** button.

   Note: If the term has already been modified from its delivered version, this button does not appear.

5. Click the **Redesign** button.
6. Click **Edit Actions.**
7. Change the status of one or both actions (Process and Auto Generation Started) to **Inactive.**
8. Click **Done** and then click **Save.**

Leads are automatically generated when the channel execution value on the marketing channel definition is set to sales, and the status of a campaign activity moves from approved (APPR) to executing (EXEC). Leads are produced for PeopleSoft Sales when the channel execution value is set to Sales. No messages appear regarding the lead generation.

Related Links

Marketing Programs - Activities Page
"Understanding AAF" (Automation and Configuration Tools)

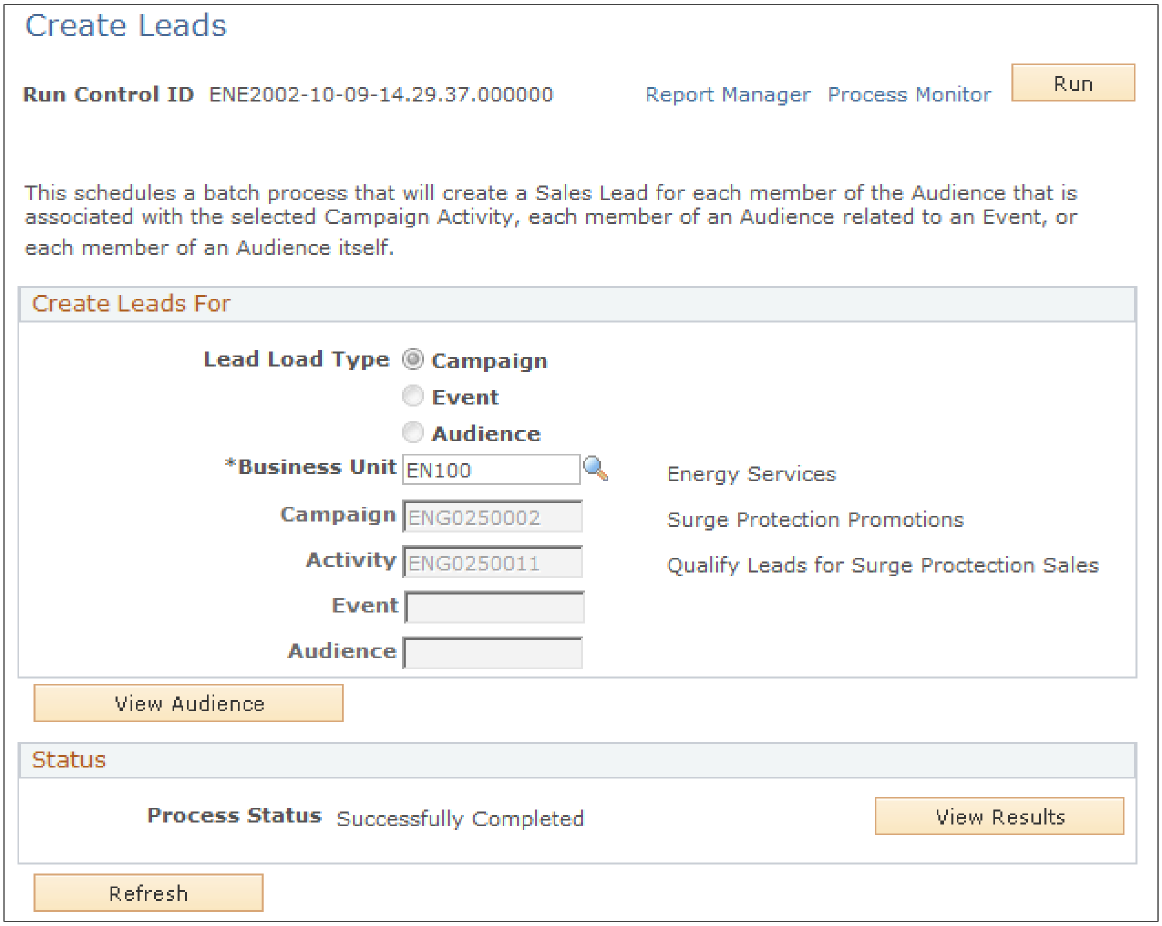
Create Leads Page

Use the Create Leads page (RA_CREATE_LEADS) to turn campaign audiences into sales leads.

Navigation:

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

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



Create Leads For

Field or Control	***Description***
Business Unit	Select the business unit within which the campaign resides.
Campaign	Select the campaign within which the activity resides.
Activity	Select the activity. **Note:** The system exports only those audiences that have the status *Committed.*

Field or Control	***Description***
View Audience	Click to access the View Activity Audience page, where you can verify the audience. **Note:** Although all audience entries appear, entries that have been deleted or are part of a control group are not used to create sales leads or prospects.
Run	Click to run this request. PeopleSoft Process Scheduler runs the Create Sales Leads/Prospects process at user-defined intervals.

Status

Field or Control	***Description***
Process Status	Displays the status of the process. Values are *Not Yet Processed, Successfully Completed,* or *Completed With Errors.*
View Results	Click to access the Leads Creation Status page, where you can view the process results. **Note:** This button is enabled when the process finishes.

View Audience Page

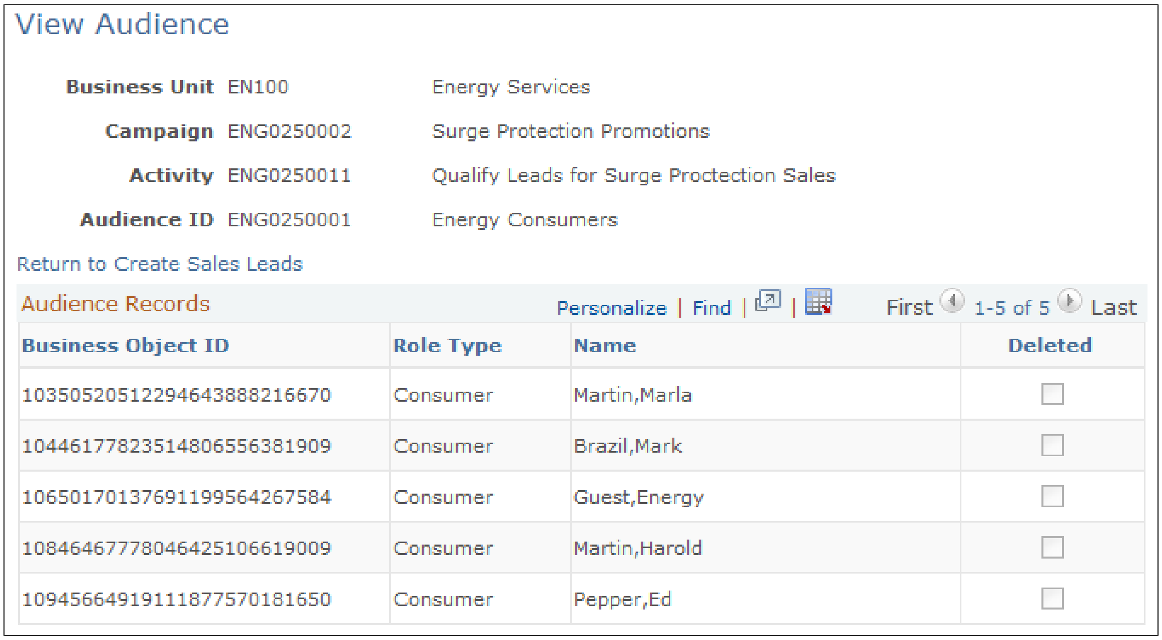
Use the View Audience page (RA_VIEW_WAVE_LIST) to view the created audience.

This page enables you to see the actual results of a generated audience.

Navigation:

Click the **View Audience** button on the Create Leads page.

This example illustrates the fields and controls on the View Audience page.



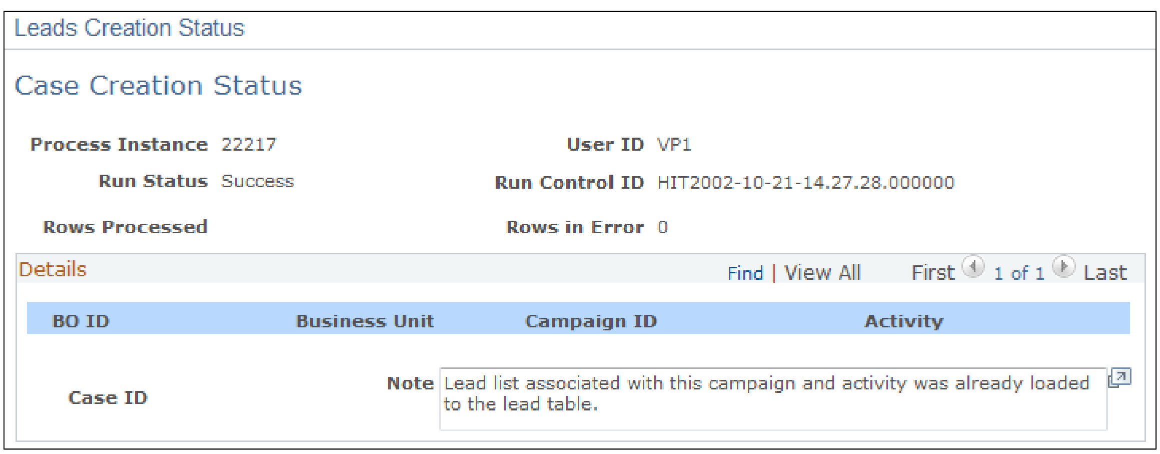
Leads Creation Status Page

Use the Leads Creation Status page (RA_CREATE_LEAD_STA) to confirm results of the creation process.

Navigation:

- Click the **View Results** button on the Create Leads page.
- **Marketing** > **Execution** > **Lead Creation Status**

This example illustrates the fields and controls on the Leads Creation Status page.



This page displays detailed information about the results of the Create Leads process.

Field or Control	Description
Note	Displays notes related to the process. If errors occur during the process, a message might appear for each error.

Creating Bulk Cases

PeopleSoft Marketing enables you to create cases for marketing campaign and events. You can create bulk cases based on batch processing from marketing. The create bulk case action schedules a batch process that will create a Case 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.

This topic discusses how to create bulk cases and view the case status.

Pages Used to Create Bulk Cases

Page Name	Definition Name	Usage
Bulk Case Creation Page	RA_CREATE_CASES	Turn campaign audiences into cases based on batch processing from Marketing.
Bulk Case Creation Status Page	RA_CREATE_CASE_STA	View results of the creation process.

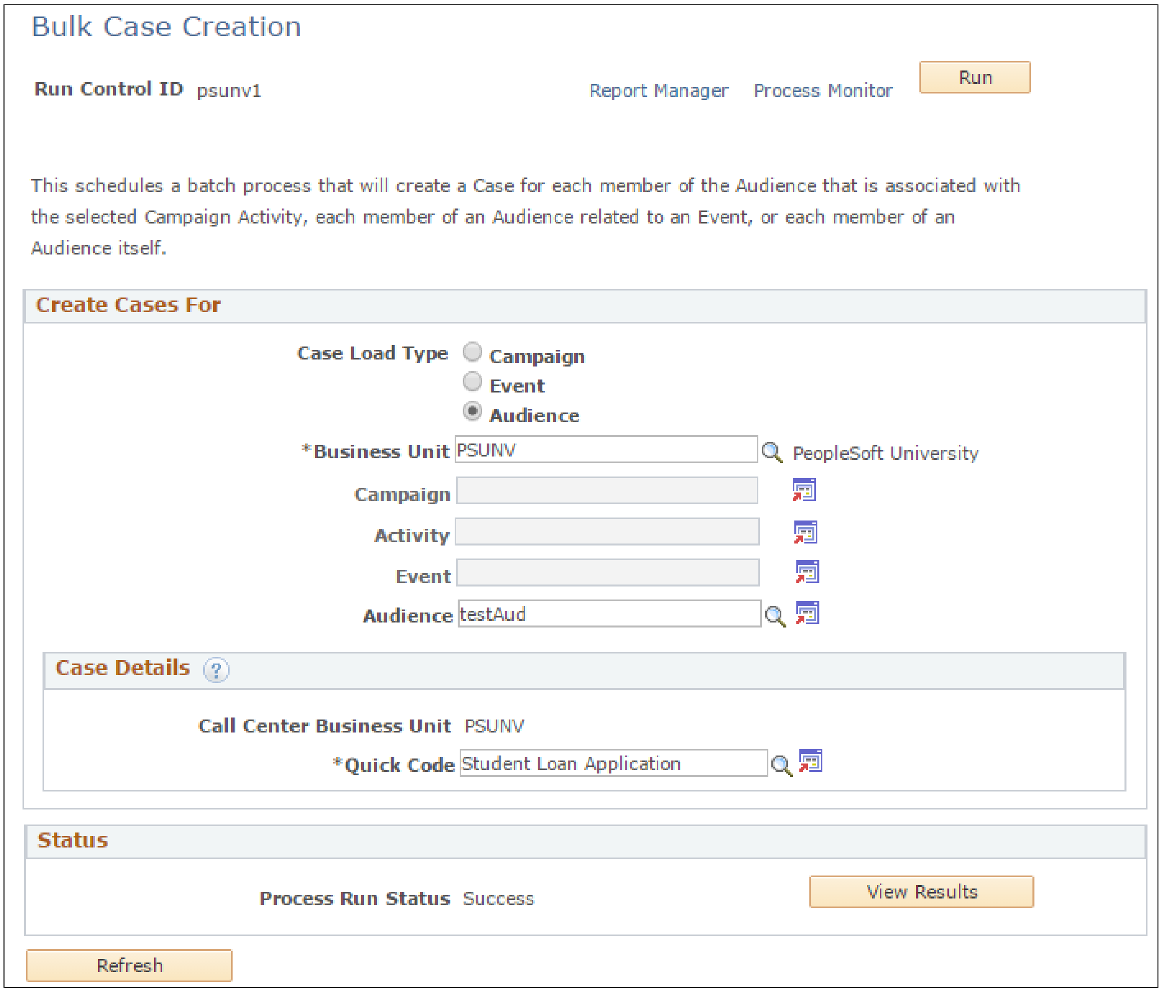
Bulk Case Creation Page

Use the Bulk Case Creation page (RA_CREATE_CASES) to turn campaign audiences into cases.

Navigation:

Marketing > **Execution** > **Bulk Case Creation**

This example illustrates the fields and controls on the Bulk Case Creation page.



Case creation for each member of the audience is executed as a background process.

Create Cases For

Field or Control	***Description***
Case Load Type	Choose from Campaign, Event or Audience.
Business Unit	Select the Business Unit within which the Audience resides. This action populates the Call Center Business Unit field.
Audience	Select the Audience **Note:** The system exports only those audiences that have the status **Approved**.

Field or Control	***Description***
Call Center Business Unit	This is a display only field. This field is populated when the Business Unit is selected.
Quick Code	Quick Code is a prompt field and is mandatory. The Quick Codes available for selection in the Bulk Case Creation page are based on the Call Center Business Unit associated with the Marketing Business Unit in the Marketing Definition.
Run	Click to run this request. PeopleSoft Process Scheduler runs the Create Bulk Cases process at user-defined intervals.

Status

Field or Control	***Description***
Process Status	Displays the status of the process. Values are *Blocked, Cancel, Cancelled, Delete, Error, Hold, Initiated, Not Successful, Pending, Processing, Queued, Restart, Success* or *Success With Warning*.
View Results	Click to access the Bulk Case Creation Status page, where you can view the process results. **Note:** This button is enabled when the process finishes.

Related Links

Defining PeopleSoft Marketing Business Units

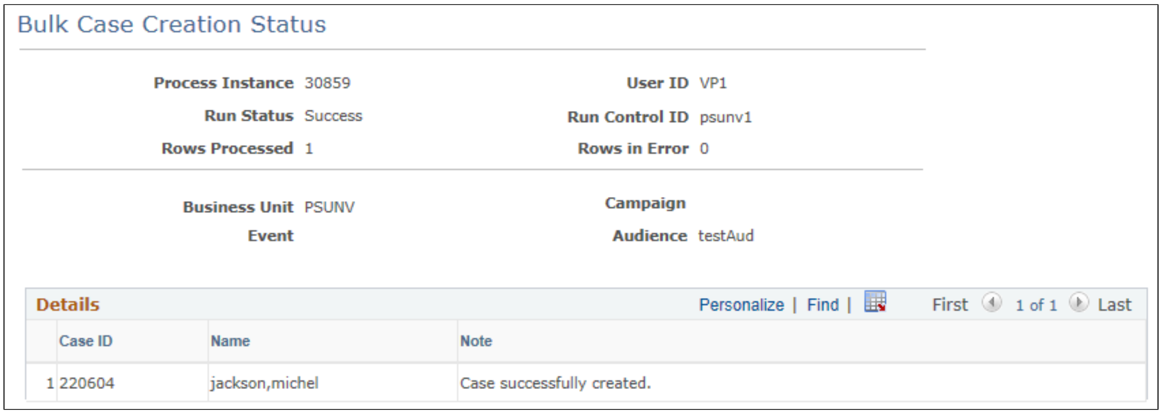
Bulk Case Creation Status Page

Use the Bulk Case Creation Status page (RA_CREATE_CASE_STA) to view results of the bulk case creation process.

Navigation:

- Click the **View Results** button on the Bulk Case Creation page.
- **Marketing** > **Execution** > **Bulk Case Creation Status**

This example illustrates the fields and controls on the Bulk Case Creation Status page.



This page displays detailed information about the results of the Create Bulk Cases process.

Field or Control	***Description***
Note	Displays notes related to the process. If errors occur during the process, a message might appear for each error.

Chapter 10

Using Interactive Reports in PeopleSoft Marketing Applications

Understanding Interactive Reports

Interactive reports are a dynamic, interactive, high-level implementation of PeopleTools Analytic Calculation Engine (ACE). These reports do not require an analytic logic server or a separate database to store data. You can save results by exporting them to Microsoft Excel, or you can print them.

With interactive reports, you can view transactional data in multidimensional online reports. To determine how information is displayed, drag dimension options onto the report grid. Data can be further filtered by selecting a single value for any dimension option.

For example, using the Campaign Performance Forecast Analysis interactive report, you can analyze campaign performance for all campaigns, for a single campaign, for all campaigns and all activities, for a single campaign and all activities, or for a single campaign and a single activity, among other options. Some interactive reports also enable you to perform what-if scenarios.

While interactive reports are interactive, the communication between interactive reports and the PeopleSoft CRM database is one-way. The changes that you make on an interactive report do not affect data in the database. Interactive reports appear in separate windows. You cannot transfer from an interactive report to a component to access data. In PeopleSoft Marketing, user roles and access profiles control access to forecasts and thereby to interactive reports.

PeopleSoft marketing applications provides seven interactive reports:

- Campaign Performance Forecast Analysis (PeopleSoft Marketing).
- Dialog Performance Forecast Analysis (PeopleSoft Marketing)
- Dialog Survey Report (PeopleSoft Marketing)

Related Links

“Understanding Interactive Reports” (Application Fundamentals)
“Launching the Workforce Survey Analysis Report” (PeopleSoft Workforce Communications)

Marketing Center Security and Interactive Reports

The following Interactive Reports use the Marketing Center hierarchy:

- Dialog Performance Forecast Report.
- Dialog Survey Report.

See “Understanding Interactive Reports” (Application Fundamentals).

Using Interactive Reports for PeopleSoft Marketing

This topic discusses how to use Interactive Reports for marketing.

Pages Used to Launch Interactive Reports for PeopleSoft Marketing

Page Name	***Definition Name***	***Usage***
Campaign Performance / Forecast Analysis Page	RA_WHATIF_UPD	Launch interactive reports for viewing key measurements, performing what-if scenarios, and establishing assumptions for marketing campaigns.
Performance Page	RA_WHATIF_CAMPAIGN	View key measurements of campaign performance in one report. By changing the dimensions, you can view results from various angles.
Forecast Page	RA_WHATIF_FORECAST	Perform what-if scenarios using actual and projected campaign results. You can create and save multiple scenarios to test different assumptions.
Assumptions Page	RA_WHATIF_REV_COST	Establish assumptions for marketing campaign interactive reports.
Dialog Performance/Forecast Analysis Page	RY_DIALOG_IR_ADD	View key measurements, perform what-if scenarios, and establish assumptions for online dialogs.
Dialog Survey Report Page	RY_DLG_SRY_RPT	View results of Online Marketing survey dialogs.

Campaign Performance / Forecast Analysis Page

Use the Campaign Performance Analysis page (RA_WHATIF_UPD) to launch interactive reports for viewing key measurements, performing what-if scenarios, and establishing assumptions for marketing campaigns.

Navigation:

- **Marketing** > **Interactive Reports** > **Campaign Performance Forecast**
- Click the Reporting button in the Marketing Toolbar

Performance Page

Use the Performance page (RA_WHATIF_CAMPAIGN) to view key measurements of campaign performance in one report. By changing the dimensions, you can view results from various angles.

Navigation:

Click the **Launch Interactive Report** button on the Campaign Performance / Forecast Analysis page

Results Measured

The page measures:

- Audience size.
- Number of leads.
- Number of opportunities.
- Number of customers.
- Response rate.
- Conversion rate.
- Campaign cost.
- Gross revenue.
- Gross profit.

Available Dimensions

Results can be measured by:

- Rollup
- Campaign.
- Activity.
- Channel.

Forecast Page

Use the Forecast page (RA_WHATIF_FORECAST) to perform what-if scenarios using actual and projected campaign results. You can create and save multiple scenarios to test different assumptions.

Navigation:

Click the **Launch Interactive Report** button on the Campaign Performance / Forecast Analysis page, then click the Forecast tab.

Results Measured

The Campaign Forecasting Analysis page measures actual performance against projected results for:

- Audience size.
- Projected audience size.
- Response rate.
- Projected response rate.
- Conversion rate.
- Projected conversion rate.
- Projected number of leads.
- Projected number of customers.
- Projected total cost.
- Projected revenue.
- Projected profit.

Available Dimensions

Results can be projected by:

- Campaign.
- Activity.
- Channel.
- Roll up campaign.

Assumptions Page

Use the Assumptions page (RA_WHATIF_REV_COST) to establish assumptions for marketing campaign interactive reports.

Navigation:

Click the **Launch Interactive Report** button on the Campaign Performance / Forecast Analysis page, then click the Assumptions tab.

Establish values for three factors:

- Unit campaign cost.
- Unit acquisition cost.
- Revenue per customer.

These values are used to project costs and revenues relative to real or projected results.

Available Dimensions

Results can be projected by:

- Campaign
- Activity
- Roll Up Campaign

Dialog Performance/Forecast Analysis Page

Use the Dialog Performance / Forecast Analysis page (RY_DIALOG_IR_ADD) to view key measurements of dialog performance in one report. By changing the dimensions, you can view results from various angles.

Navigation:

Marketing, Interactive Reports, Dialog Performance Forecast

The report has two tabs: Reach and Response

Results Measured

The Reach page measures:

- Audience count.
- Projected count.
- Hard bounces.
- Soft bounces.
- Unknown bounces.
- Percent bounces.
- Projected percent bounces.
- Projected bounced.
- Queued.
- Expired.
- Reach delivered.
- Reach projected delivered.
- Opened.
- Open rate percent.
- Reopened.
- Clickthrough.

- Clickthrough rate percent.
- Projected CTR percent.
- Projected percent response.

Note: The Open Rate percentage for emails is calculated based on the number of Opened divided by the number of Reach (those emails that were delivered, with no bounces included). For Opened and Reopened, only email in HTML format is tracked (using a 1x1 clear pixel image embedded in the email). When emails are opened multiple times, the Reopen value will reflect each subsequent opening after the first (for example, if an email is opened three times, it will show Opened as 1 and Reopened as 2). Be aware that the Reopened results might not be accurate if the user's email client (for example, Microsoft Outlook) caches the email content.

The Response page measures:

- Response count.
- Projected response count.
- Visits.
- Visitors.
- Projected visitors.
- Percent response.
- Projected percent response.
- Submitters.
- Projected submitters.
- Percent submitters.
- Projected percent submitters.
- Percent complete.

Available Dimensions

Results can be projected by:

- Activity (Action)
- Audience

Dialog Survey Report Page

To view survey reports, use the System Process Requests (PRCSMULTI) component.

Use the Dialog Survey Report page (RY_DLG_SRY_RPT) to view results of Online Marketing survey dialogs.

Navigation:

Marketing, Interactive Reports, Dialog Survey Report

The Dialog Survey Report displays survey summary results. The default dimension displayed is All_Contacts. Note that the survey data selected for the report will only include the last survey instance of each case.

To run a new survey report, you must enter the relevant business unit, dialog name (only dialogs in Live state are available for selection), and the date range in which the survey was submitted.

Note: If you will be generating Survey Reports frequently, it will increase the data volume in the report table and affect report performance. Starting a daily-based report data purge process will help to maintain the Survey report generation performance. To do this, select PeopleTools, Process Scheduler, System Process Requests. Create a new Run Control ID: OLM_ACE_REPORT_PURGE, and then click **Run.** Select the check box for the process named RY_RPT_SV_CP and then click OK.

See PeopleSoft Enterprise Customer Relationship Management 9.1 Installation Guide

Results Measured

This page measures the following based on question, survey status, and document name:

- Survey score: The average survey score (not a summation), depending on the level of the dimension chosen. The average can adjust for every dimension selected.

  Note: The survey score displayed per contact is an average, depending on the number of surveys sent and responded to by the contact. Also, the overall survey score displayed for all contacts is also an average of all surveys taken by all of the contacts. To view survey scores for each individual survey, refer to the Case page.

- Survey sent: The number of surveys sent to the contact.
- Incomplete survey: The number of surveys that were opened but not completed.
- Completed survey: The number of surveys completed.
- Response rate %: Calculated by Survey Sent /(Incomplete Survey + Completed Survey) * 100.

Available Dimensions

Results can be projected by:

- Assigned To
- Case ID
- Region
- Location
- Company Name
- Contact (the default dimension when the page is opened)
- Case Priority

Exporting Dialog Responses

PeopleSoft Online Marketing dialogs and surveys allow you to gather useful information from audiences that respond to the dialogs. While operational reports provide a useful and powerful way to view and analyze these responses, it is also useful to be able to easily export this information to a Microsoft Excel-formatted report. Using a simple tool, you can export Online Marketing dialog and survey information to an XML file, which can then be imported into Excel.

Pages Used to Export Dialog Responses

Page Name	***Definition Name***	***Usage***
URL Maintenance Page	URL_TABLE	Specify the URL of the FTP server (must be a secured (FTPS) server where the exported file will be attached.
Dialog Response Export Page	RY_DRE_CTL	Specify information about the report to be exported.

Dialog Response Export Page

Use the Dialog Response Export page (RY_DRE_CTL) to specify information about the report to be exported.

Navigation:

Marketing, Operational Reports, Document Responses, Dialog Response Export

Field or Control	***Description***
Report ID	Enter a meaningful report ID that defines the type of report you are generating. For security purposes, report IDs are unique to each user (for example, if two users each defined a report named June 09 Survey Responses, each would only see his or her own report).
Description	Enter a description of the report and its purpose.
Business Unit	Select the business unit in which the dialog was created.
Dialog Name	Select the name of the dialog from the list of available choices. The list will display only the names of dialogs you have permission to access, and will only include Live dialogs.

Field or Control	***Description***
Limit responses to Audience	*(Optional)* Enter an audience name to export responses only from members of that audience. You can only choose audiences that you are authorized to view (you must have permission to view both Individual and Aggregate responses for the chosen audience). Leave the field blank to export responses from all respondents, regardless of audience.
Response From Date	Enter a date if you want to limit the exported responses to only those submitted after that date. Leave the field blank if you do not want to specify a beginning date.
Through Date	Enter a date if you want to limit the exported responses to only those submitted before that date. **Note:** You can enter dates in the **Response From Date** or **Through Date** fields, both, or neither, depending on how you want to limit the exported responses.

Chapter 11

PeopleSoft Marketing Reports

PeopleSoft Marketing Reports: A to Z

This table lists the PeopleSoft Marketing reports, sorted by report ID.

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*
- *PeopleTools: SQR Language Reference for PeopleSoft*

For samples of these reports, see the Report Samples that are published with the online documentation.

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
RAC1002 Campaign and Activity Effectiveness	Combined Campaign and Activity effectiveness report.	Marketing, Operational Reports, Campaign and Activity Effectiveness	RUN_RAC1002
RAC2000 Task Management	This report shows all the Tasks irrespective of whether they are Campaign Tasks or Content Tasks. Using the report parameters you may obtain a list of Tasks a) for a particular Campaign b) for a Particular Content c) All Campaign and Content Tasks	Marketing, Operational Reports, Task Management	RUN_RA2000
RAC7000 Campaign ROI (return on investment)	This report compares the actual revenue generated by a particular activity over its actual cost. A negative ROI indicates costs exceed revenues. The report is grouped by Rollup Campaigns, Campaigns.	Marketing, Operational Reports, Campaign ROI	RUN_RA7000

