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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon (?) to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon (?) in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- Community: Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the Oracle Help Center to find guides and videos.
- Training: Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle’s commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide contains information to help sales managers, salespeople, and other sales users create campaigns and manage the various aspects of campaigns.

This guide provides information about:

- Marketing content and segmentation strategy
- Creating sales campaigns and designing and launching marketing campaigns
- Response management features

Related Guides

You can refer to the following related guides to understand more about the user tasks covered in this guide.

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<tr>
<td>Oracle Applications Cloud Using Common Features</td>
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<tr>
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Related Topics

• Oracle Help Center
2 Getting Started

Using Oracle Sales Cloud: Overview

Oracle Sales Cloud lets sales representatives and other sales personnel quickly and easily perform core sales tasks on a variety of interfaces, including computers, laptops, tablets, and smartphones. The intuitive design of the user interface (UI) reduces the need for application training and promotes faster adoption by sales personnel. Analytics built in to the UI provide information when and where it’s needed. The following are some of the key capabilities of Oracle Sales Cloud:

- Manage customers and contacts.
- Log sales calls.
- Manage calendars and activities.
- Create and update leads.
- Create, monitor, and update opportunities.
- Access the product catalog and add products to opportunities and leads.
- Create and update territories and quotas.
- Manage sales forecasts.
- Participate in social conversations.
- Upload and access content in the Lightbox content library.
- Manage partner information.
- Use mobile applications to manage customer information, leads, and opportunities.
- View key metrics, such as pipeline revenue and quota performance, at a glance.

Understanding the Sales Cloud UI and Features

The following is an introduction to the UI and a brief discussion of some of the features available in Sales Cloud:

- **Home page:**
  - The home page offers a central location from which you can navigate to complete important tasks, like updating contact, account, lead, or opportunity information.
  - The home page contains a springboard and a panel that, based on setup, shows either company announcements or social networking conversations.

- **Springboard:**
  - The springboard is the area on the simplified UI home page, and above all simplified pages, that contains a set of functional area icons.
  - The springboard provides icons that you can use to open pages and applications.

- **Sales analytics:**
  - Use the dashboard and infolets page to view and drill into supplied infolets that contain key metrics, such as Top Open Deals or Stalled Deals. If you have access to infolets, you see a series of pagination controls (clickable dots) near the top of the page.
Gain insight into your performance against your quota.

View your pipeline, including total opportunity revenue, revenue per sales stage, and opportunity count in the pipeline.

View past and upcoming activities.

See separate views of the dashboard as salesperson or sales manager.

For more information on analytics, see the Oracle Sales Cloud - Using Analytics and Reports guide.

- Leads:
  - View and edit lead information, including products, budget, and deal size.
  - Create, qualify, and convert leads.

- Opportunities:
  - Create and manage opportunity information, such as owner, product revenue, win probability, sales stage, and more.
  - Manage all the information related to your opportunities like relationships, contacts, appointments, and sales team members from one, convenient portal.

- Sales forecasting:
  - View forecast, pipeline, and won amounts for current, past, and upcoming quarters.
  - See forecast trends over time.

- Accounts and contacts:
  - Create and manage accounts, contacts, and households for B2B selling.
  - View and manage associated items, such as interactions, leads, opportunities, and appointments.

- Partner management:
  - Manage partners, including their leads and opportunities.
  - Review notification requests and manage activities and notes related to partners.
  - Manage partner enrollments.

- Scheduling and calendars:
  - Create and manage appointments and tasks, and associate them with the contacts, leads, and opportunities you’re working on.
  - Manage team calendars and access autogenerated tasks.

- Social:
  - Participate in conversations with other sales team members.
  - Associate conversations with sales accounts, contacts, leads, and opportunities.

- Configuration by administrator:
  - Set any one of several different themes to change look and feel.
  - Change icon style, button shape, and logo to personalize the user experience.
  - Customize news and announcements on the home page.
For more information on UI navigation, see the topic, Navigating in the Application: Explained, available in the online help. Administrators should refer to the topic, Understanding Default Navigation Components.

Extending and Customizing the UI

After your services are up and running, several customization options are available for you to tailor the UI to company business needs, such as:

- Specify customization layers, for example, site or role
- Configure the dashboard by adding or removing infolets
- Extend table and form regions
- Reorder subtabs
- Show or hide fields
- Add and remove custom fields
- Change field labels
- Make fields read-only

Note that some of these extensions are done using Application Composer and some are done with Page Composer. For more information on extending the UI, see the Oracle Sales Cloud - Customizing Sales guide.

Related Topics

- Navigating in the Application: Explained
- Oracle Sales Cloud Help Center
Available User Interfaces

Oracle Sales Cloud provides UIs that are optimized for different uses:

- The simplified UI provides the efficiency and speed sales personnel need to do their work.
• The desktop UI provides additional page real estate required for setup and administration tasks.

• The mobile UI is optimized for managing sales information on multiple mobile devices. You can use it to manage appointments, leads, accounts, contacts, and opportunities. It includes:
  
  o Location integration, so you can see where customers are located.
  
  o Integration with a calendar, e-mail, and a camera. You can automatically log e-mails and other interactions with customers, and add pictures of contacts to their profiles.
A disconnected mode that makes it possible for your sales organization to continue working even when disconnected from the network.
Searching Oracle Sales Cloud: Explained

There are two different ways of searching Oracle Sales Cloud:

- You can use the global search located at the top of the application page to search across objects in the application:

  ![Global Search](image)

- You can navigate to the work area of the object you are looking for and search for it there by name or using multiple search criteria.

  ![Opportunities Search](image)

This topic provides a brief overview of the two types of searches. Related topics provide tips for using them.

Global Search

Enter your search term in the global search box located at the top of each page to find all the records related to that search term. For example, entering the name of a contact as a search term retrieves not only the information about the contact herself, but also all of the opportunities, leads, and activities that mention that contact.

Global search makes it possible to search all the key fields in the following objects. Your application administrator determines which of these objects are available for search in your implementation.

- Accounts
- Activities
- Campaigns
- Contacts
- Forecasts
- Households
- Leads
- Opportunities
- Partners

Not all objects or fields are searchable. Global search does not permit searches of child objects, or through notes or presentations you have uploaded, for example. Attachment searches are restricted to the attachment file names. Nor can
you use global searches to find calculated values, such as the currency value of an opportunity or the due date of an activity. While the application administrator can make your custom objects searchable, you cannot search custom child objects. Custom objects have their own work areas. Custom child objects appear as tabs of other objects.

Global search depends on an indexing process to make new records available for search. Your application administrator schedules a separate process to periodically index each application object. The indexing processes are usually scheduled to run once a day in off-peak hours to minimize performance impact. Any new record you create is not available to search by you or by others until the indexing process has run.

Searching in the Work Areas

Use the search in the different work areas to quickly find a particular object you are looking for in one of three ways as highlighted in the following figure:

- By typing the object name in the **Find** box.
  As you type, the application matches the search term to the records you accessed, created, or updated recently and displays them in the Recent Items window.
- By selecting a list. A list displays records using search criteria you or an administrator saved previously.
- By clicking **Show Advanced Search** (the filter icon) and entering your search criteria in the Advanced Search panel.

![Diagram showing search in work areas](image)

Searching Using the Advanced Search Panel in Work Areas

When you click the **Show Advanced Search** icon (filter icon) in the work area landing pad, the application displays the Advanced Search panel showing the search criteria for the list displayed on the page. You can modify the existing search criteria for the list, add additional search terms, or select a different list (saved search) as the basis of your search.

> **Note:** The Advanced Search panel uses the term **Saved Search** instead of **List**.
Clicking **Search** initiates the search. Clicking **Save** saves your changes or creates new list, as described in related topics.

**Finding the Most Recent Records Created in the Application**

Searches in Oracle Sales Cloud depend on two indexing processes that are set up by the application administrator to run periodically, one for the work area searches and another for the global search. Work area searches are indexed every five minutes, so use this type of search for finding the most up-to-date information. You will want to use the work area search to find the latest information about a customer appointment, for example. Oracle recommends global searches be indexed once every day, so use global searches for finding information across different objects.
Even though new records you create are unavailable for search until they indexed by each search, they are always available for you from the Recent Items list. As you enter a search term in either the global and work area searches, the application automatically displays a list of records you personally created, edited, or accessed in the last 30 days (or another interval configured by the administrator). Each search maintains its own list of Recent Items. When you use the global search, you do not see the recent items from the work areas and vice versa.

Searching for Objects in Their Work Areas: Explained

This topic describes how to search quickly for accounts, opportunities, leads, and other objects.

Use the following methods for searching:

- Start typing the object name and select the item from the list of recent items.
- Search for names using complete words or phrases.
- Search for partial words using the percentage sign (%) to stand for missing characters or words.
- Select a list, click the **Show Advanced Search** (the filter icon), and modify the search criteria.
- Search for the account itself first to find activities, leads and other objects related to an account.

Typing the Object Name and Reviewing the List of Recent Items

To search for an object by name, navigate to the object you want to search, click in the **Find** field, and start typing any one of the words in the name. Capitalization doesn’t matter.

As you type, the application matches your entry to the records you accessed, created, or updated recently and displays them in the Recent Items window. If you see what you are looking for, just select it.

Searching by Object Name Using Complete Words or Exact Phrases

If you don’t find what you are looking for among the Recent Items, then finish typing the word and click **Search** (the magnifying glass icon). The application displays a list of records with names that contain your search term, followed by records with related words, just in case you didn’t type the word correctly. For example, if you are searching for accounts using the word **Software**, as shown in the figure below, then the application first displays the account names that contain that
word, such as Compucon Software and Forte Software Inc. (1), followed by names with similar spellings such as Softgear Inc. (2).

If you want to find the exact name you are searching for, then put quotation marks around your search terms. For example, "Forte Software Inc", returns just that one record.

Searching for Partial Words in a Name

You can also search for partial words.

- Put a percent (%) sign after two or more letters, and you get all the names with words that start with those letters.

  For example, searching on pint, returns Pinnacle Technologies and All Pines Furniture.

- Put the percent sign at the front of the term, and you get records that end with your term. For example, searching for %ard, returns The Board of Education and Edward Ward and Co.

- Put the percent sign at both ends, and you get all the customer names with words that include those letters.

  \(^{Note}\): You can use the percent (%) sign at the beginning of your search term only in the Find field on the main page of each object.

Using the percent (%) sign can slow your searches, so enter a whole word if you know it.
Searching Using Predefined Lists and Modifying the Search Criteria

Searching by name is not the only way to find what you need. You can search by selecting one of the lists you or an administrator has created from the List list and use the following procedure to modify the search terms.

1. Click **Show Advanced Search** (the filter icon highlighted in the following figure).

   ![Opportunities](image)

   The Advanced Search window appears, showing the current search criteria for the list that is displayed on the page.
2. You can choose different search criteria by selecting a different list from the **Saved Search** list.

3. You can then modify the search by:
   - Changing the scope of the search by choosing a different record set.

   For example, selecting **All records I can search** from the **Record Set** list, searches all the records you can access. Selecting **Records I own** searches only the records where you are listed as the record owner. The available record sets vary by object.
Tip: To improve search performance, choose the more restrictive record set or restrict the range of records you are searching by adding other search terms such as state or country.

- Adding new search terms by clicking the Add button.
- Changing the values and operators.

You must enter values for fields highlighted by asterisks.
- Reordering the search fields by clicking Reorder.

Note: You cannot delete any of the fields provided by Oracle. You can only delete fields you added.

4. Click Search.

The application displays the search results.

5. To save your modified search as a new saved search (list) do the following:

   a. Click Save.

   The Create Saved Search window appears.

   b. Enter a new name for the saved search.

   c. Optionally, you can set this search to be the list that appears whenever you navigate to the work area by selecting the Set as Default option.

   d. Click OK.

Searching for the Account to Access Opportunities and Other Related Objects

Search for the account and then drill down to the object from the Account Overview page. Whatever search method you use, always remember that you may not have permission to access all information in the application. For example, to see an opportunity, you may have to own the sales territory, be on the sales team, or manage someone who is.

There may be a delay of a few minutes between the time you create or update a record and when you and others can search for it. That’s because the application must update an index to enable searches. You can access newly-created items from the Recent Items list in the meantime.
Related Topics

- Creating a New List in a Work Area: Worked Example
- How can I create saved searches with just one custom field?
- Deleting or Hiding a List: Procedures
3 Understanding Segmentation Strategy

Marketing Segmentation: Functional Overview

Marketing Segmentation enables marketers to create targeted segments of prospects and customers based on flexible criteria and data sources. Marketing defines the criteria, such as demographic, industry, geography, and product purchase. Segmentation uses the criteria to determine what prospects or customers to include in the segment as an audience for a marketing campaign.

Typically, marketing segmentation involves the following activities:

- Determining what data to collect
- Collecting data from a variety of sources and integrating the data into a single view of the prospect or customer base
- Determining the quantity of prospects or customers who share certain characteristics
- Identifying a group of target prospects and customers to deliver a marketing treatment or message

You can access Marketing Segmentation directly from the Audience work area and from the Campaigns work area while in the process of creating or editing your campaign. The following are the main elements that make up marketing segmentation:

Segments and Segment Trees

Segments and segment trees are selected in marketing campaigns to receive marketing communications and to generate leads. Marketing Segmentation supports the creation and management of segments and segment trees.

Query Engine

The segmentation query element:

- Uses criteria to identify target audience for personalized messages and content
- Outputs the target audience as a dynamic list to be used by the campaign execution process

Contact Planning Rules

Contact planning rules are enterprise-wide rules that enforce recency, frequency, volume and channel constraints during the process of segment creation. For example, an enterprise wants to ensure that partner contacts are not targeted in a marketing campaign they are about to launch. They create a segment for contacts that excludes partner contacts. Next, they set a contact planning rule at an organization level so all segments run by the Marketing organization has to include the nested segment for the contacts.

Metadata

You can create and maintain segmentation metadata, such as target levels, presentation catalog subject areas, and schema mappings. Metadata is used when creating segments, segment trees, and list formats.
List Formats
List formats define the layout of files that you can use for a variety of purposes. The List Format Designer enables you to select content from a subject area (list catalog) to include in the output of segments. You can also include filters in the list format to further enhance the output.

Subject Areas
Subject areas are organized collections of related object attributes that are made available for reporting and segmentation in Business Intelligence (BI) Answers and in the BI Composer reporting tool.

Caching
You can use segmentation criteria blocks to count target-level identifiers. For example, an e-mail marketer can exclude contacts that have no e-mail address. They can also exclude contacts that have explicitly refused to receive e-mails. Instead of evaluating a set of contacts repeatedly in every segment, the marketer can create a single criteria block using this criterion. Caching such a criteria block saves the list of target-level identifiers in a table. When you reuse this criterion across segments that you create, the cache is used and time-consuming database query operations are minimized.

Related Topics
- Marketing Segmentation: Architectural Overview
- Marketing Segmentation: Implementation Planning

Marketing Segments and Segment Trees
Segmentation is the practice of dividing a customer base into groups that are similar in specific ways, such as demographics or past purchases. Marketers use segmentation to target groups of customers and allocate marketing resources effectively. Segments and segment trees are selected in marketing campaigns to receive marketing communications and to generate leads. You can create and manage segments and segment trees.

Manage Marketing Segments and Segment Trees
- For information about creating marketing segments and segment trees, see the Using Marketing Segments and Segment Trees chapter in the Marketing Segmentation Guide. Refer to Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.
Campaign and Audience Components: How They Work Together

Audience components are interlinked to campaigns stages at the design phase.

The following figure outlines the audience component flow for segments and lists. It depicts the data source and the flow of both segment and list data prior to a campaign launch.

![Campaign and Audience Components Diagram](image_url)
Campaign Stages Associated with Audience Components

The campaign design interface provides the components you use to create stages and specify audiences. The audience collectively describes all the contacts you want to target in the campaign. The load task uses segments or lists to build the audience of campaign members targeted in a particular stage. Only Interaction and Lead Generation stages have audiences.

The following campaign stage design elements are associated with the Interaction type stage and the Lead Generation type stage when designing a multistage campaign.

- Audience
- Allocation
- Additional options
- Lead Options

When designing for a mini campaign, use Select Audience to specify and associate your audience with the mini campaign.

Audience

The audience collectively describes all the contacts you want to target in the campaign. Only Interaction and Lead Generation stages have audiences. For an Interaction stage, the audience can include any combination of segment trees, segments and lists. Once you launch the campaign, lists are expanded to show individual contacts. For a Lead Generation stage, the audience can include segment trees and segments, but not lists.

Allocation

Allocation describes the process of relating the selected audience members to the corresponding treatments, to determine what content each contact will receive. Applicable to Interaction stages, the two available modes of allocation are Simple and Advanced. In Simple mode, you can only allocate 100 percent of the audience element, whether segment or list, to a treatment. In Advanced mode, you can allocate by count or by percentage, and you can allocate a specific count or percentage of audience members to a control group.

Additional Options

Applicable to Interaction and Lead Generation stages, this page provides additional choices for loading audience segments and for lead generation processing. During the load process, the campaign members for each stage are loaded into the database. For segments, the selected contacts are also stored in the segmentation cache. The segmentation cache is purged automatically 24 hours after loading, so there is no need to select the Purge Cache option if more than 24 hours have elapsed since the last load cycle.

Lead Options

For a Lead Generation stage, once you have added audience segments and trees, select the audiences from which leads are to be created. For each audience, select the source code, so that the resultant leads can be tracked back to the corresponding marketing activity.

Related Topics

- Campaign Stage Additional Options: Explained
- Campaign Stage Design Elements: Explained
Segment Tree Usage in Campaigns: Examples

You can use a segment tree to subdivide audience members within your campaign.

Target Different Sets of Customers

You may want to target different sets customers of a campaign into three separate categories such as Bronze, Silver and Gold. Create a segment tree with these three nodes so that you can target the different members of each category to receive specialized treatments for your e-mail campaign. You might want to offer your Gold group of customers a special discount of 30% for purchases over a fixed amount, customers that are grouped in the Silver category might receive a 20% discount, while you want to give a 10% discount to the Bronze targeted group.

Allocate Marketing Content

You can also use segment trees to allocate marketing content to specific groups by using the Allocation functionality within your campaign. In this case, you can allocate audience members from the different nodes on the segment tree to the corresponding treatments, to determine what content each audience member will receive.

Refresh Segment Members: Explained

A segment defines a target set of organizations and persons. Members of a segment change over time because the criteria is reevaluated against the most current data in your database.

Refresh Member Count

The Refresh Member Count action from the Segments dialog enables you to view the latest member count totals for your segments and segment trees. For example, after you have changed or added criteria to your segment or segment tree using the segment designer, you can perform an update to the count to ensure the most recent count data is returned. When you can click the Refresh Member Count icon, both Member Count and the Last Count Updated Date fields display the most current count data and the date of when the count was last updated.

For a Segment Tree, the Refresh Member Count action will cause the segment tree to refresh both Member Count and Last Count Updated Date attributes for all underlying segments and tree nodes. Each node in the Segment Tree displays the count of the node. For example, in the segment tree structure, the first row displays the overall count for the segment tree and displays the last count update and contains a link to edit the segment tree. The next row which contains the underlying segment displays the total count for the tree, then you have the leaf level nodes which have the counts for each node.

Saved Results Set

A saved results set is a fixed set of segment members that are recorded at a particular point in time. They are saved in the database so that they can be reused in the future without reevaluating the criteria again.
Related Topics

- What’s the difference between updating the count and refreshing the allocation?

List Types: Explained

A marketing list is categorized by a list type. Some list types have very specific uses and others are used to organize lists into categories, for reference. Because the available list types are defined in an extensible lookup, your application administrator can create more list types as needed.

Standard List Types

The standard list types are as follows:

<table>
<thead>
<tr>
<th>List Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predefined</td>
<td>Predefined lists can be associated with a treatment and used to test the quality of a treatment or a campaign. They typically contain employees of your enterprise. Predefined list members will receive the marketing content whenever the treatment is tested or the campaign is launched.</td>
</tr>
<tr>
<td>Subscription</td>
<td>Subscription lists are used to group contacts who will periodically receive marketing materials. When associated with a treatment whose content contains subscribe and unsubscribe response forms, the subscription list is updated whenever an e-mail recipient responds.</td>
</tr>
<tr>
<td>Imported</td>
<td>An import list type identifies a new list created when defining an import activity for leads and responses. When the import activity is processed, the lead or response contacts are added to the list. A marketing list with this type can be selected as a target audience in campaigns.</td>
</tr>
<tr>
<td>Internal</td>
<td>An internal list is a grouping of selected existing contacts that you compile manually. A marketing list with this type can be selected as a target audience in campaigns.</td>
</tr>
</tbody>
</table>

Marketing Segmentation Administration: Highlights

Marketing segmentation provides customer segments, personalization merge fields, contact planning rules, list formats, and is fully integrated with Oracle Business Intelligence. It uses the same metadata as the Business Intelligence reporting tools. Consequently, marketing segmentation has access to a library of available customer attributes, calculations, derived metrics, and data mining models. Oracle Enterprise Manager incorporates the integration points between Oracle Marketing Segmentation and Universal Content Repository for the storage of lists generated for export.

Configuring segmentation for Marketing includes the management of the following tasks:

- Segmentation Manager Configuration Parameters
- Marketing List Formats
- Content Management Integration
- Contact Planning Rules
• Marketing Module Metadata
• Security Mappings for Users of Marketing Segmentation

Oracle Marketing Using Marketing Segmentation Guide describes the segmentation configuration tasks for marketing.

Segmentation Manager Configuration Parameters
You can configure the deployment parameters, default values, and connection pools to the database server, and generate list export formats.

• For information about setting up marketing module parameters, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.
• For more information about content management integration, see the Middleware System Administrator’s Guide for Oracle Business Intelligence Enterprise Edition on Oracle Technology Network at http://www.oracle.com/technetwork.

Marketing List Formats
List Formats define the layout of files that you can use for a variety of purposes. While Marketing Segmentation supports five list format types, Oracle Marketing uses four formats. List Export Formats are used to define the customer data and other campaign-related information that is exported so that the campaign stage can be executed. For example, a list export format may provide a list file containing customers and addresses to a direct mail fulfillment supplier for printing and mailing or to create a call list to distribute to employees in a sales organization. E-Mail Server Formats are used to export the members of an e-mail campaign to the Oracle E-Mail Marketing Server. The e-mail personalization format is the type of E-Mail Server format that provides the columns that can be used as merge fields to personalize the e-mail message sent to each recipient. Campaign Load Formats are used to load the individual members of a segment or a segment tree to the campaign. Data Load Formats are used to import leads resulting from a multistage campaign, lead generation stage.

• For information about marketing list formats, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.
• To provide default campaign load and data load formats for campaigns, navigate to Setup and Maintenance and select the Manage Marketing Profile Options task to update the Campaign Member Load Format Default and Campaign Lead Generation Load Format Default profiles.

Content Management Integration
Configure deployment and connection parameters for Oracle Enterprise Content Management server repository using Oracle Enterprise Manager.

• For information about content management integration, see the Middleware System Administrator’s Guide for Oracle Business Intelligence Enterprise Edition.

Contact Planning Rules
Contact planning rules allow you to define contact frequency and volume constraints that can be applied globally or against a specific customer communication channel. Contact planning rules use segment inclusion criteria to define the conditions where the rules apply.

• For information about contact planning rules, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.
Marketing Module Metadata
To support the segmentation process, the Oracle Business Intelligence Administration Tool provides a set of Marketing metadata, such as target levels, presentation catalogs, sampling factors, and schema mappings.

- For information about marketing segmentation metadata, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.

Security Mappings for Users of Marketing Segmentation
- For information about the security mappings and access levels specific for users of Marketing Segmentation, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.

Creating a Personalization Format List for Treatments: Worked Example
You want to create an e-mail Personalization Format List to use as part of your Treatment creation process. This example demonstrates how to create and use an e-mail personalization format list to provide merge fields for your treatment. You want to personalize the e-mail message sent to each industry-specific recipient of your campaign.

Creating Personalization Format List Columns
You want to ensure the following columns are available as merge fields in your e-mail treatment template: Industry Name, Person First Name, Person Last Name, and E-mail Address:

1. From Oracle Business Intelligence Enterprise Edition application, navigate to New - List Format.
2. From the List Formats page, click Catalog from the toolbar and copy a predefined Campaign Members Export format file as follows:
   - Navigate to: /Shared Folders/Marketing/Segmentation/List Formats/
   - Locate the Campaign Members Export Format file, click More, and then Copy.
   - Navigate to /My Folders/ and select the Paste icon from the toolbar to place the predefined format list file in your area to modify as required.
   - Click Edit to open the List Formats page.

   The columns contained in the Campaign Members Export Format are displayed in the Selected Columns area.

   Ensure that you keep the following required columns for your e-mail personalization format list file. These columns are used by the E-Mail Marketing Server for processing activities and reporting purposes.

   - Email Address
   - Stage Member Id
   - Contact Party Id
• Treatment Id
• Campaign Id
• Source Code
• Forwarder Message
• Personalized Text
• Person First Name
• Person Last Name
• Current Date
• Current Time

If you want, you can remove any other columns in the format list that you don’t intend to use.

Next, you want to add a new column Industry Name to your e-mail personalization format.

3. From the Subjects Areas section, expand the Account Industry folder, and drag and drop Industry Name to the Selected Columns area.

4. Remove the folder heading portion of the column header caption for the new Industry Name column created in Step 3.

The E-Mail Marketing Server expects each column header in the e-mail file to contain the column header, not the folder header caption. Also, you must remove any spaces between column names in the Column Heading field.

Use the following steps to remove the folder heading portion of the column header caption:

◦ Select the icon to the right of the Industry Name column to access the Column Properties page.

◦ In the Column Properties window, select the Custom Headings check box.

◦ Delete the value in the Folder Heading field.

◦ Delete the space between Industry and Name in the Column Heading field.

◦ Click OK.

5. Click the Save As icon on the toolbar and save your personalization format list in the following folder:

/Shared Folders/Marketing/Segmentation/List Formats/

Defining Your Marketing Treatment

Create a marketing treatment using your personalization format as follows:

1. From the Campaigns work area, double click Create Treatment.

2. From the Enter Treatment Details page, select E-mail in the Channel field.

3. From the Enter Channel Details page, go to Personalization Format field. In this example, browse to /shared/Marketing/Segmentation/List Formats/ and select the personalization format you previously created.

4. From the Define Content page, go to Edit Content and select Merge fields in the Element field.

5. From the Element Value list, view the values that you defined in your Personalization Format List.

The values in the list format are now available to use when defining the treatment content by inserting merge fields and previewing the content.

Related Topics
• Adding Personalized Text in an E-Mail Campaign: Example
• How can I update campaign members before launching my multistage campaign?

FAQs for Understanding Segmentation Strategy

What's the difference between segments, lists, and campaign members?

The following table describes the main differences between a segment, a list, and a campaign member.

<table>
<thead>
<tr>
<th>Segment</th>
<th>List</th>
<th>Campaign Member</th>
</tr>
</thead>
</table>
| Indicates a subdivision of a broad target market of organizations and persons such as customer, contact, consumer, and so on. The segment can be further divided by criteria such as age and gender, or other distinctions, such as location or group size. Segment data is collected and stored by the marketing segmentation application and can be used in to receive marketing content. Suspect data is only available in deployments that include a warehouse. | Indicates a specific grouping of individuals selected to receive marketing communications by e-mail, direct mail or phone, for the purpose of generating leads. You can create internal lists and subscription lists. Lists are also created when defining an import activity for leads and responses. List examples include rented or purchased lists from marketing bureaus, registration lists from trade shows or events, and output lists from other applications. Internal lists are created within the Audience dialog by querying an existing contact. | Indicates an individual, selected as part of the total count from a segment, segment tree, or list, and is associated with a campaign. If you include a manual step to inspect data after the campaign load process has completed, then you can preview and update campaign members before the campaign launch. Some of the selected individuals may not be included in the total count if:  
• A missing or incorrect e-mail address exists  
• The do not contact preference is set for the individual. |

What's the difference between a segment and a segment tree?

A segment represents a target set of organizations and persons that qualify for a set of criteria. Unless the segment is defined with a saved result set, the exact members of a segment change over time because the criteria are reevaluated against the most current data in your database.

A segment tree represents one or more segments and splits the segment members into smaller groups. As you split a segment into smaller groups, the groups are displayed in a tree diagram. The end point nodes of a segment tree contains the members that can be associated with a marketing campaign.

What's the difference between a marketing list and a list in Marketing Segmentation?

A marketing list that you import or create is a static list of contacts.

A list, as described in the Marketing Segmentation guide, is the formatted output of the dynamic selection of contacts based on segmentation rules associated with the campaign's segments and segment trees.
Marketing Segmentation lists can have the following formats:

- Campaign Load Formats. Used to load the members of a segment or a segment tree to the campaign during campaign execution.
- Data Load Formats. Used to import leads resulting from a lead generation stage of a multistage campaign.
- List Export Formats. Used for campaign distribution lists, such as a direct mail list for a marketing fulfillment supplier. The list contains information about the members of a segment or segment tree, such as the contact name and address.
- E-Mail Server Formats. Used to export the relevant data for each member of an e-mail campaign to the marketing E-Mail Server.

How can I add an audience segment created in Marketing Segmentation?

When creating a multistage campaign, you can add an audience segment as follows:

1. From the Campaigns work area, click **Actions**, then click **Create Segments**.
2. Enter a unique name for the segment type you want, and select a target level.
3. Click **Save and Design** to go to the designer and enter criteria for the segment.
4. Generate a member count and save the segment or segment tree.
5. Navigate to **Design Campaign** and click **Add Audience**.
6. Click the **Segments** tab and enter the name of the segment or segment tree to apply as your Audience for your campaign stage.

If you are working on a mini campaign, you can use the **Select Audience** step from the **Create Mini Campaign** UI.

How is the segment path determined?

The path /shared/marketing/segmentation/segments/ is the default location where the segment and segment tree definitions are stored. This path is included in the software code and can’t be changed.

How can I edit the list, segment, or segment tree from my campaign?

You can create and edit a list or segment from the multistage campaign **Audience** tab and from the **Select Audience** step for mini campaigns. For Lists, click the **View Details** icon to view the members of the list that you want to add or remove from the Audience for your campaign.

Click **Select and Add** to select and add an existing Segment. You can edit the segment to add or remove criteria by clicking on **Name** to go to the **Edit Segment** dialog. Click the **Segment Details** icon to view the criteria of the segment that you want to add or remove from the Audience for your campaign.
How can I modify a list format for a segment?

List formats define the layout of files that you can use for a variety of purposes ranging from creating campaign distribution lists to saving result sets from segments and segment trees. To modify a list format for a segment, do the following:

1. From the **Audience** work area, select **Manage List Formats** to access the **List Formats** page.

   From here, you can either open an existing saved list format or create a new list format.

2. To create a new list format, select a subject area from the list.

3. Click the **Options** tab to specify the type of list you want.

Alternatively, you can copy predefined list formats and modify them to suit your requirements. This way you can be sure of having the required fields with proper naming and formulas plus you get the filters defined as well. Existing list formats are in the List Format pane to the left. The formats are in folders, and the formats are organized first by format (List Export, Email Server, Campaign Load, and so on) and then by personal and shared formats. Examples: My List Export Formats, Shared List Export Formats.

What happens if I modify campaign load formats for a multistage campaign?

Data Load formats must have columns that exactly match the field names of the integration components where the data is loaded. If you modify a load format, you must verify that you have included the required columns for the business component you want to load for your multistage campaign. From the **Audience** work area, select **Manage List Formats** to access the List Formats page. If necessary, use **Custom Headings** in the **Column Properties** dialog box to rename any columns where the column label does not exactly match the name of the integration component field name in the enterprise application. You can test your modified campaign load format list by previewing some sample contents of the list format.
4 Understanding Marketing Content

Marketing Promotions and Coupons: Explained

Promotion names and associated coupon codes provide tracking for offers extended to customers. This topic includes the following:

- Promotions, Coupons, and Marketing Treatments
- Promotions and Mini Campaigns
- Promotions, Coupons, and Source Codes
- Promotions, Coupons, and Marketing Responses

Promotions, Coupons, and Marketing Treatments

You can add promotion names and selective coupon codes to a treatment, where you design the promotional message and coupon content. You allocate the treatment to specific customer segments or lists of contacts when designing your multistage campaign. You can design one treatment per promotion, per coupon, or combinations of promotions and coupons. You can also assign promotions and coupons to more than one treatment.

Promotions and Mini Campaigns

You can add promotion names to your mini campaign, where you design the promotional message and coupon content to be delivered to the customer segments and lists of contacts selected for the campaign. You can design one mini campaign per promotion or multiple promotions; all coupons for the selected promotion are automatically included. You can also design many mini campaigns using the same promotion.

Promotions, Coupons, and Source Codes

A marketing source code is a unique identifier that represents a campaign or marketing activity and is used to track marketing effectiveness. While a source code does not represent individual promotions or coupons, it does represent the campaign stage instance, audience segment or list, and treatment combination of a multistage campaign, and the instance, campaign content, and audience segment or list combination of a mini campaign.

To view a listing of source codes and associated campaign components, navigate to the Review Marketing Source Codes task in Setup and Maintenance. Note that a source code can be listed more than once in this page to support querying on the related promotions and coupons.

Promotions, Coupons, and Marketing Responses

You can provide a source code when creating, editing, or importing a marketing response. A response generated as a result of an e-mail campaign URL that’s trackable or an e-mail bounce, inherits the source code derived from the originating e-mail marketing campaign.

By providing a source code on the marketing response, associated promotions and coupons are also added as informative information on the response. You can search responses by promotion name and coupon code.
Treatments: Explained

You use treatments to represent the combination of a marketing message for targeted audience members and delivery options for third-party suppliers. This topic provides a brief overview of the treatment components. A treatment defines the channel-specific marketing message for targeted audience members. For example, depending on the channel you select, the treatment can include options that control how marketing messages are sent to third-party suppliers. You can change the content and attach marketing collateral to personalize a treatment for a specific segment.

Treatments can have the following components:

- Products and promotions
- Personalization elements
- Distribution options
- Associated lists
- Confirmation e-mails
- Content and attachments

Products and Promotions

When you create treatment content, you can do the following:

- Associate products and product groups with treatments.
- Use the available collateral for the products and product groups.
- Associate time-limited promotions and coupon codes to support the tracking of offers given to customers.

Personalization Elements

With some treatment channels, such as e-mail and SMS, you can add merge fields to personalize the content for each recipient. To provide a different set of merge fields for a treatment, use either:

- The standard merge fields for contacts
- An alternative e-mail personalization format that you can define using the marketing segmentation feature

Note: You can access the Marketing Segmentation feature directly from the Audience work area and from the Campaigns work area while you’re creating or editing a campaign.

Distribution Options

Select the supplier and the supplier’s distribution profile if you use a supplier to fulfill your marketing campaign. The distribution profile provides instructions for creating and delivering campaign information to the supplier when the campaign is launched.
Associated Lists

In addition to your external recipients, you can associate a predefined list with your campaign. A predefined list is a static list of internal employees who receive the same campaign information as your external recipients. Sending your campaign content to a predefined list is a useful way to verify the quality of service that the supplier is providing to your contacts.

A subscription list associated with a treatment is the list of contacts that’s updated when e-mail recipients select whether they want to subscribe or unsubscribe. You can associate a subscription list with multiple treatments. You can use a treatment-specific subscription list to have opt-in and opt-out responses associated with a particular list.

Confirmation E-Mails

If you are required to confirm or cancel a subscription, then you must have three treatments. To illustrate this requirement, consider the following example of three treatments that are referred to as Treatment One, Treatment Two, and Treatment Three.

Treatment One offers recipients the options to request a subscription or cancel a subscription. Those who respond receive a second e-mail in which they can finalize their request. Although Treatment One is the first treatment to be sent, it is the last that you create because it refers to the other two treatments. The following table shows the required attributes and values for Treatment One.

<table>
<thead>
<tr>
<th>Treatment Step</th>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treatment Details</td>
<td>Channel</td>
<td>E-mail</td>
</tr>
<tr>
<td>Channel Details, Confirmation E-Mails</td>
<td>Confirm-in Treatment</td>
<td>[Click the Subscribe confirmation request link included in the e-mail content. For this example, select Treatment Two.]</td>
</tr>
<tr>
<td>Channel Details, Confirmation E-Mails</td>
<td>Confirm-out Treatment</td>
<td>[Click the Unsubscribe confirmation request link included in the e-mail content. For this example, select Treatment Three.]</td>
</tr>
<tr>
<td>Content</td>
<td>Response Forms</td>
<td>[Click Subscribe confirmation request or click Unsubscribe confirmation request]</td>
</tr>
</tbody>
</table>

Treatment Two provides the subscribe confirmation request to recipients who click the [Subscribe confirmation request link included in the e-mail content of Treatment One. Recipients who respond to this treatment are added to the subscription list associated with this treatment. The following table shows the required attributes and values for Treatment Two.

<table>
<thead>
<tr>
<th>Treatment Step</th>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treatment Details</td>
<td>Channel</td>
<td>E-mail confirmation in</td>
</tr>
<tr>
<td>Channel Details, Associated Lists</td>
<td>Subscription List</td>
<td>Select a list</td>
</tr>
<tr>
<td>Content</td>
<td>Response Forms</td>
<td>Subscribe to list</td>
</tr>
</tbody>
</table>
Treatment Three provides the unsubscribe confirmation request to recipients who click the **Unsubscribe confirmation request** link included in the e-mail content of Treatment One. Recipients who respond to this treatment are removed from the subscription list associated with this treatment. The following table shows the required attributes and values for Treatment Three.

<table>
<thead>
<tr>
<th>Treatment Step</th>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treatment Details</td>
<td>Channel</td>
<td>E-mail confirmation out</td>
</tr>
<tr>
<td>Channel Details, Associated Lists</td>
<td>Subscription List</td>
<td>Select a list</td>
</tr>
<tr>
<td>Content</td>
<td>Response Forms</td>
<td>Unsubscribe from list</td>
</tr>
</tbody>
</table>

**Content and Attachments**

To create your content, you can select a treatment template, or you can start with a blank page. You can either upload content from your desktop or switch the HTML editor to source mode and paste the HTML source code.

In the body of the e-mail, you can include text, merge fields, graphic links and response forms. If you have both plain text and HTML versions of the treatment, the MIME standard ensures that the appropriate version is delivered to each recipient's e-mail client. You can attach a file, a URL, or a text block to the treatment. You can also select product specific content.

**Content, Treatments, and Segments for a Global Campaign: Points to Consider**

When creating campaigns that target multiple geographic regions, languages and currencies, typical considerations include what products to market, what languages to include, and how the campaigns will be fulfilled. This topic discusses the following points:

- Product eligibility
- Segments
- Treatments
- Multistage and mini campaigns
Determining Product Eligibility
You must select products that apply to each geographic area that you target with your global campaign.

Creating Segments
You can create segments that are filtered by language or by geography. Name your segments so that you can identify them by language when you add your audience to your marketing campaign. You can create segment trees to organize the segments.

Creating Treatments
If you have multiple language-specific segments, then you must create a corresponding treatment for each language. Name your treatments so that you can identify them by language when you add them to your marketing campaigns. When creating your marketing message and choosing supporting product collateral, consider the following:

- Marketing message text
- Text, images, and colors included in graphics
- Date and time formats
- Currency and local taxes
- Content of any collateral attached to the treatment
- Content of any web pages linked to the treatment

You must also verify that your third-party fulfillment supplier can manage your language requirements.

Creating Campaigns
For multistage campaigns, you can create separate stages for each language, or create a single stage and use the allocation feature to associate language-specific treatments with the corresponding segments or segment trees. For mini campaigns, that don’t have allocation functionality, you must create a separate campaign for every region and language. For example, for Latin America, you could create a Spanish campaign applicable to multiple countries and a Brazilian Portuguese version for Brazil.

Related Topics
- How can I add an audience segment created in Marketing Segmentation?

FAQs for Understanding Marketing Content

What's the difference between a seed list and a subscription list?
A seed list is a static list of contacts. There are two locations in the Treatment flow where you can associate a seed list with an e-mail treatment.

- If you make the association in the Channel Details view, the list is automatically added to the list of actual campaign members when the treatment is associated with a campaign stage and fulfilled as part of a campaign.
• If you make the association in the **Define Content** view, after selecting the **Send Test E-Mail to a List** action, you can use the seed list to test an e-mail treatment before you associate it with a campaign stage.

A subscription list is another type of static list. When associated with a specific treatment that has subscription response forms included in the treatment content, it will reflect the responses of campaign recipients who choose to subscribe.

You can design a campaign stage to increase the subscription list members, by adding the treatment and allocating it to audience segments or other lists, to target contacts, rather than adding the subscription list as an audience. Once ready to leverage the subscription list to target marketing material, you can associate it with both multistage campaigns and mini campaigns.

**How do I create e-mail interactions for a treatment?**

To create interactions for e-mails associated with a marketing treatment, navigate to **Edit Treatment** page and select the **Create Interaction** check box on the **Enter Channel Details** area. Run the Import Marketing E-mail Interactions ESS process once and thereafter, set it to repeat once per day.

**Related Topics**

• **Scheduled Processes: Explained**
5 Creating Sales Campaigns

Sales Campaigns: Overview

This topic provides an overview of sales campaigns. Sales representatives and sales managers can create sales campaigns for reaching out to contacts within their territories. Using sales campaigns, they invite contacts to an event or inform them about a product launch. Features of a sales campaign include:

- The ability to target contacts from multiple sources including the contact repository and previous campaigns.
- An easy-to-use guided process
- Access to e-mail templates
- A response gathering and monitoring capability
- The option to personalize e-mail for individual contacts
- The ability to schedule a campaign to launch on a specific date
- Automated follow-up for specific response types

To create sales campaigns, start from the Campaigns work area, which you can access from the Navigator by selecting Sales Campaigns under the Sales section.

Creating a Sales Campaign

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily create sales campaigns that send marketing e-mail correspondence to individual contacts of your customers.

Adding Contacts to Sales Campaigns

You can select a specific set of contacts to include in a sales campaign, or you can decide to include all contacts from a previously created sales campaign.

Note: The number of contacts to include in your sales campaign should not exceed 500.

From the Contacts subtab, you can search for contacts by Record Set, Name or Account. You can add additional search criteria fields by clicking the Add button. This action allows you to further segment and target specific contacts to include search criteria such as City, Country, Creation Date, Buying Role, and so on to further refine your search.

By selecting the Previous Campaigns subtab, you can select the campaign you want from the Campaign Name list. You can then select and apply the contacts to your campaign.

Select contacts for your sales campaign from the Contacts subtab as follows:

1. Sign in as a sales representative or a sales manager.
2. From the simplified UI, click Sales Campaigns to go to the Sales Campaigns work area.
3. Click Create Campaign.
4. Click **Add Contacts** to go to the **Add: Contacts** screen.
5. Click **Contacts** subtab and enter search criteria for contacts by **Record Set**, **Name** or **Account**, and click **Search**.
6. Click **Add** if you need to further refine your search for specific contacts.

**Note:** Click **Create Contact** if you want to create a new contact to add to your sales campaign.

7. Select the contacts you want from the search list and click **Apply** and then **OK**.

### Inserting Response Forms to Sales Campaigns

You can add forms to campaign content so that recipients can respond to your campaign. Sales campaigns have the capability to track responses and convert them to leads. You can add customer response forms to an e-mail template when creating a sales campaign.

For example, during the **Design E-Mail** step of the sales campaign process, you decide to insert one of the following response forms to your campaign:

- Forward To Friend
- Request Call Back
- Requested More Information

Insert a response form to your sales campaign as follows:

1. Sign in as a sales representative or a sales manager.
2. From the simplified UI, click **Sales Campaigns** to go to the Sales Campaigns work area.
3. Click **Create Campaign**.
4. Click **Add Contacts** to add the contacts you want to target for your sales campaign.
5. Go to the **Design E-Mail** step and select the template you want to use.
6. Place your cursor in the area of the template where you want to insert a response form link.
7. Click **Insert Elements** and from the **Show** field, select **Response Forms**.
8. Select the response form you want and click **Insert**. Repeat this step if you want to include another response form, and click **Done** when finished.

### Adding Follow-up Tasks to Sales Campaigns

You can associate follow-up tasks to customer response forms on an e-mail template when creating a sales campaign. For example, during the final **Wrap Up** step of the sales campaign process, you decide to associate one of the following tasks to the customer response forms you inserted from the Design E-Mail step:

- Create call back task
- Receive e-mail notification

Add a follow-up task for your customer response form as follows:

1. Sign in as a sales representative or a sales manager.
2. From the simplified UI, click **Sales Campaigns** to go to the Sales Campaigns work area.
3. Click **Create Campaign**.
4. Click **Add Contacts** to add the contacts you want to target for your campaign.
5. Go to the **Design E-Mail** step and select a template to use.
6. Select the response form you want, and click **Insert**. Repeat this step if you want to include another response form, and click **Done** when finished.

7. From the **Wrap Up** step, go to the **My Follow-Up Actions, Customer Responses** area.

8. From the **Actions** list, select the follow-up action you want to associate with each of the customer response forms you previously inserted in your e-mail template.

---

**Sales Campaign Content: Explained**

You can personalize your sales campaign by adding components such as images, merge fields and response forms.

To create the content of your sales campaign, you can add any combination of the following:

- Images
- Merge fields
- Response forms
- Standard and ad hoc URLs
- Conditional content

**Images**

Add graphic images to your e-mail. You can provide a link to an image already on a server, or select a local file and upload it to the server. Specify the size and placement of the image. You can add a URL of a publicly hosted image using the **img src** tag.

**Merge Fields**

Personalize your e-mail message body by adding placeholders from a list of merge fields, such as the recipient’s first name. Merge fields are standard sets of attributes pertaining to an individual contact. You can insert them into your e-mail content. When you launch the campaign, merge fields are dynamically populated directly from the database. With sales campaigns you can also compose a personalized text message for each recipient. The personalized text feature is not available for multistage campaigns.

**Response Forms**

Insert response forms as active links in your e-mail campaign content. When a contact clicks one of the links, a specific response is automatically generated. All such responses are gathered and monitored, to track contacts’ actions. Available response forms for sales campaigns are:

- Forward to Friend
- Request Call Back
- Request More Information

**Standard and Ad Hoc URLs**

You can add any of the following types of URL:

- Standard URLs are predefined and commonly used across the enterprise.
- An ad hoc URL can be created when you define your e-mail content.
By default, all standard URLs are tracked automatically. You can optionally enable tracking for ad hoc URLs, or disable tracking for standard URLs. With tracking enabled, every time a contact clicks a link in a campaign e-mail, the click is recorded as a specific response, together with details pertaining to the URL.

**Conditional Content**

Conditional content is inserted or omitted based on the results of a rule. There are two elements that you can use to generate conditional content within an e-mail:

- **If-Then-Else cases** are used to determine if a block of text or HTML is removed from an outgoing e-mail, by verifying if a merge field value is defined. The merge field is defined if it is not an empty string or, for numeric merge fields, if it is not a value of 0 (zero). If the merge field is defined, the block of text or HTML remains in the outgoing e-mail. If the merge field is not defined, the block of text or HTML is removed from the outgoing e-mail.

- **Named Blocks** are used to decide whether or not to insert a block of text or HTML into an outgoing e-mail, by comparing one string to another. If the two strings are identical, the block is inserted.

**Related Topics**

- Using Conditional Content in Sales Campaign Templates: Explained

**Adding Personalized Text in an E-Mail Campaign: Example**

You are creating an e-mail campaign inviting contacts to an event that your company will host next month. You already have a template that provides most of the information.

In addition to standard merge fields that will automatically populate contact data, you want to add a more personal touch, for a selected few contacts, to the otherwise generic e-mail content.

**Adding Personalized Text**

1. Create a campaign, enter the details, select all the contacts for the campaign (not just the ones to whom you will send a personalized message) and, optionally, choose a template.
2. When you edit the e-mail content, add the personalized text merge field where you want the personalized text to appear.
3. When you enter advanced options, locate the contact for whom you want to create a personal text in the list of contacts. Click the edit icon in the Personalize column to open a new HTML editor window where you can enter a message for the selected contact. You can apply styles just as in the common area of the e-mail. You can preview and edit the personal message until you have what you want. You can repeat this step to create individual personal messages for as many contacts as you choose.

**Follow-Up Actions: How They Work**

When you create a sales campaign, you may want to be notified automatically when a targeted contact responds in a specific way. You can associate follow-up actions with specific responses, so that the follow-up action is triggered automatically when a contact responds to your campaign e-mail.
Response Form
You can include response forms in the content of your campaign. These appear to recipients as hyperlinks that they can click within the e-mail. Every click is recorded, and used to track usage statistics. In addition, each response can also trigger an associated action to be performed automatically.

Follow-up Action
Follow-up actions are predefined actions that can be triggered by contacts' responses. The purpose of these actions is to inform you, the creator of the campaign, when a particular contact clicks a specific response. You can choose to receive this information in an e-mail notification that will appear in your e-mail, or by the creation of a task that will appear in your worklist. In either case, the information you receive includes campaign details, contact details, the specific response that the contact clicked, and the date and time of that click.

FAQs for Creating Sales Campaigns

What is the recommended limit of contacts to include in a sales campaign?
The number of contacts to include in your sales campaign should not exceed 500. Oracle recommends to create a new sales campaigns if you want to add more contacts beyond the recommended specification.

What campaign records do the different record sets permit you to search?
The different record sets provided in the Saved Searches window restrict your saved searches to different sets of sales campaigns.
The following table lists and describes the record sets for sales campaigns. Not all record sets are available to all users. For example, the record set involving subordinates is available only to managers.

Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records you and your subordinates own. Or restrict your searches to a smaller geographical area. For example, search all the sales campaigns in one state instead of the whole country.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I own</td>
<td>Sales campaigns that you created.</td>
</tr>
<tr>
<td>My subordinates own</td>
<td>Sales campaigns owned by your subordinates.</td>
</tr>
</tbody>
</table>
### Record Set Name | Description
--- | ---
All records I can see | Sales campaigns that you can view based on your sales team membership, your position in the organization, and security permissions.

---

**How can I add optional text to the Forward to Friend response form?**

Using the Design E-Mail step of the Sales Campaigns process, insert the **Forward to Friend** link from the **Insert Elements > Response Forms** list. Next, show the **Merge Fields** list, and insert the **Forwarder Message** standard merge field in the message content: `${Standard.ForwarderMessage}`. The standard merge field is replaced with any optional text you might enter when you forward the e-mail campaign to your friend using the **Forward to Friend** link.

**What sales campaigns display when I select the My Draft Campaigns and the My Completed Campaigns lists?**

When you select the **My Draft Campaigns** list in the Sales Campaigns work area, the application displays a list of all of the campaigns you own that are pending activation. Selecting the **My Completed Campaigns** list displays all sales campaigns you own that have been completed within the last three months.
6 Designing Marketing Campaigns

Manage Multistage, Multichannel Marketing Campaigns

Campaign Stage Design Elements: Explained

The campaign design interface provides the components you use to create stages and specify audiences, treatments, allocation, schedule, event details, additional options, and lead options. The elements available to specify for each stage are determined by the stage type you select.

The following table lists the stages and corresponding elements.

<table>
<thead>
<tr>
<th>Stage Type</th>
<th>Design Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outbound</td>
<td>Audience</td>
</tr>
<tr>
<td></td>
<td>Treatments</td>
</tr>
<tr>
<td></td>
<td>Allocations</td>
</tr>
<tr>
<td></td>
<td>Schedule</td>
</tr>
<tr>
<td></td>
<td>Additional Options</td>
</tr>
<tr>
<td>Event</td>
<td>Event Details</td>
</tr>
<tr>
<td>Advertisement</td>
<td>Treatments</td>
</tr>
<tr>
<td>Lead Generation</td>
<td>Audience</td>
</tr>
<tr>
<td></td>
<td>Additional Options</td>
</tr>
<tr>
<td></td>
<td>Lead Options</td>
</tr>
<tr>
<td>Social site</td>
<td>Event Details</td>
</tr>
</tbody>
</table>

The stage types and corresponding standard design elements are described in the sections that follow.

*Note:* Since this campaign design functionality is extensible, your enterprise may have customized design elements that are different from the standard set. For example, your enterprise may add additional attributes to an existing tab, or may add an additional tab to capture more stage attributes.

Outbound Stage
An outbound stage has the following design elements:

- Audience
The audience collectively describes all the contacts you want to target in the campaign. For an Outbound stage, the audience can include any combination of segment trees, segments, and lists. After the campaign is launched, you can view the audience members on the campaign members page.

- **Treatments**

  Treatment is a marketing term describing the content that is to be delivered to the target audience of a marketing campaign. You can add any number of treatments from the Treatments tab. Optionally, you can create one or more treatments to include in your campaign.

- **Allocations**

  Allocation describes the process of relating the selected audience members to the corresponding treatments, to determine what content each contact will receive.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple</td>
<td>You must allocate 100 percent of the selected audience row, whether segment or list, to a treatment.</td>
</tr>
<tr>
<td>Advanced</td>
<td>You can allocate by count or by percentage, and you can allocate a specific count or percentage of audience members to a control group. The control group is a random sampling of contacts who will not receive the campaign marketing material. You can evaluate the effectiveness of the campaign by comparing responses from control group members to responses from contacts who received the marketing material. In order to have your supplier process the full volume of transactions, you allocate more than 100 percent of the audience. For example, if your supplier is to send 5000 e-mails, and you want a control group of 500, you would allocate 5500 audience members and specify the control group size. When the stage executes, 5500 audience members will be loaded, but 500 will be identified as control group members, and excluded from the launch.</td>
</tr>
</tbody>
</table>

- **Activities**

  The activities tab shows activities and dates for the stage.

- **Schedule**

  The schedule shows the start and end times of each system task that will be executed as part of the Load, List Export and Launch processes. By default, the Load, List Export and Launch processes run consecutively on the date scheduled for the stage, each step immediately following completion of its predecessor.

- **Additional Options**

  This page provides additional choices for loading campaign members.

- **Monitor**

  This page shows details of stage execution and provides the option to reexecute a stage.

**Event Stage**

An event stage has the Event Details design element, where you can select from the list of event types, select the venue, and optionally, add attachments.
Advertisement Stage
An advertisement stage has the following design elements:

- **Treatments**
  Treatment is a marketing term describing the content that is to be delivered to the target audience of a marketing campaign. You can add any number of treatments from the Treatments tab. Optionally, you can create one or more treatments to include in your campaign.

- **Monitor**
  This page shows details of stage execution and provides the option to reexecute a stage.

Lead Generation Stage
A lead generation stage has the following design elements:

- **Audience**
  The audience collectively describes all the contacts you want to target in the campaign. For a Lead Generation stage, the audience can include segment trees and segments, but not lists.

- **Additional Options**
  This page provides additional choices for loading campaign members.

- **Monitor**
  This page shows details of stage execution and provides the option to reexecute a stage.

- **Lead Options**
  After you have added audience segments and trees, select the audiences from which leads are to be created. For each audience, select the source code, so that the resultant leads can be tracked back to the corresponding marketing activity.

Social Stage
When you publish a social campaign using the social marketing feature, a multistage campaign with a Social site stage is created automatically, to enable response tracking.

**Related Topics**
- Lead Ranking: Explained

Repeating Campaign Stages: Points to Consider
Within a single campaign, you can define stages that repeat on a daily, weekly or monthly basis for the duration you specify, and can funnel customers through stages that repeat at different intervals. You can create and manage repeating stages with varying degrees of complexity, such as the following:

- Repeating a single stage
- Repeating two stages with simple funnelling
- Repeating two stages with complex funnelling
- Pausing a campaign with repeating stages
Repeating a Single Stage
You can create a campaign to target customers who have bought a subscription to your ABC product, to remind them when their subscription is about to expire, and offer a discount if they choose to renew for a longer term.

Repeating Two Stages with Simple Funneling
Your campaign has two repeating stages:

- Stage One, which repeats monthly, looks for all customers who buy your ABC product, to send them an e-mail with a link to the online user forum for ABC product. Every time a user finds an answer from the forum, rather than making a support call, your company saves money.
- Stage Two, which repeats quarterly, is funneled from Stage One, and looks for all customers who accessed the online user forum, to send them an offer to purchase one year of support for ABC product at a 50 percent discount.

When the first instance of Stage Two begins, Stage One has already repeated three times. All customers who were targeted in the first three instances of Stage One, and who subsequently visited the online forum, qualify for the discount offer, which is sent to them in the first instance of Stage Two.

When the second instance of Stage Two begins, Stage One has already repeated six times. The first instance of Stage Two has already targeted customers from the first three instances of Stage One. To ensure that no eligible customer gets a duplicate e-mail with the same discount offer, Stage Two must compute a segment which includes only those customers targeted in the last three instances of Stage One.

Repeating Two Stages with Complex Funneling
Again, your campaign has two repeating stages:

- Stage One, which repeats quarterly, targets customers who have attended your webinar during the last three months, and sends them a coupon that is valid for one year and which they can redeem online at any time within the year.
- Stage Two, which repeats monthly, is funneled from Stage One to find customers who redeemed their coupon online, plus those who also attended your webinar, and send them invitations to a company event, scheduled near their location, where they can share their experience with other customers from the same area.

Stage Two repeats frequently, to ensure that customers have the opportunity to attend an event soon after they purchase the product and redeem the coupon. The first instance of Stage Two starts soon after the first instance of Stage One, but Stage Two then repeats more frequently than Stage One.

When the third instance of Stage One begins, six instances of Stage Two have already occurred. When the seventh instance of Stage Two begins, it is not enough to target the same customers as in the second instance of Stage One, since there may be some customers who were targeted in the first instance of Stage One but who redeemed their coupons later.

It is therefore better to compute a segment for every instance of Stage Two that meets the following conditions:

- Includes all customers targeted in all previous instances of Stage One and
- Excludes all customers targeted in all previous instances of Stage Two

In this way, all customers who were ever targeted by Stage One are considered for Stage Two, but no customer gets duplicate treatment for Stage Two.
Pausing a Campaign with Repeating Stages
If a campaign is paused, all repeating stages are skipped for the duration of the pause. When the dialog resumes after the pause, any repeating stages execute on their next scheduled occurrence.

Stage Schedule Automatic Tasks: Explained
You can monitor the execution status of all completed and active processes in your campaign, to check that the campaign stages are on track in terms of completion dates and times. Campaign execution tasks are grouped in three categories:

- **Load**
- **List Export**
- **Launch**

Each category has a mandatory automatic task plus optional, configurable tasks.

**Load**
The load task uses segments or lists to build the audience of campaign members targeted in a particular stage. Every segment has an associated load format that determines which campaign member attributes are to be loaded. Optionally, you can override this default format by selecting a different load format on the Additional Options tab.

You can tailor the load schedule by enabling optional tasks, either for manual intervention or for a custom action to be executed automatically. Once the load process completes successfully, you can view individual campaign members in the Campaign Execution details for the stage.

> **Note:** All segments defined for a stage are loaded at the same time. If a stage has multiple extremely large segments, it will take longer to load. In such cases, you may want to create duplicate stages, and add only one large segment to each iteration, for faster processing.

**List Export**
The list export task takes the data from the load task, generates a text file of recipients, and uploads the file to Oracle WebCenter Content. The ID of this text file, together with the ID of the treatment stored in Oracle WebCenter Content, is made available to the supplier associated with the treatment, in the Launch task.

**Launch**
The launch task does the following:

- If the supplier is Oracle Fusion E-Mail and Web Marketing, the e-mails are delivered using the content and campaign member data uploaded in the List Export phase.
- For third party suppliers, the list of campaign members and content is delivered to them based on their distribution profile settings.

**Related Topics**

- Why didn’t execution processing start for a stage?
Campaign Stage Additional Options: Explained

Additional options are available for Interaction and Lead Generation campaign stages. This page has the following fields.

- Purge Cache
- Allowable Error Count
- Original System Reference
- Load Format
- Duplicate Look Back Days

Purge Cache
During the load process, the campaign members for each stage are loaded into the database. For segments, the selected contacts are also stored in the segmentation cache. The segmentation cache is purged automatically 24 hours after loading, so there is no need to select this option if more than 24 hours have elapsed since the last load cycle.

Allowable Error Count
Applies only to Lead Generation stages. Specify the maximum number of errors to allow before stopping the lead import process and the corresponding execution of the stage.

Original System Reference
Applies only to Lead Generation stages. Provide a source reference for the newly imported records.

Load Format
Specify the path and file name to a new mapping that will override the default load format for all segments in the stage.

Duplicate Look Back Days
Applies only to Lead Generation stages. Specify the number of days in the immediate past that the import process will check for duplicates, when importing new leads.

Campaign Actions: Explained

The campaign actions provide control over campaign execution. The following actions are available:

- Submit for Approval
- Withdraw Approval
- Activate
- Pause
- Resume
Submit for Approval
If campaign approval is enforced for your enterprise, you can't launch a campaign until it is approved. When the planning and design are finished, and the design status is set to Complete, you can submit your campaign for approval. You can select from a list of resources eligible to approve your campaign, if ad hoc campaign approval is set for your enterprise. If ad hoc campaign approval is not set, then the first approver is your manager.

You can't make further changes to your campaign while the campaign is awaiting approval. However, your organization can create a tailored workflow that permits making changes to the campaign in the interval between submission and approval. The campaign approver can approve or reject the campaign. If a campaign is rejected, you can modify it and then resubmit for approval.

Withdraw Approval
If the approver has not yet reviewed a submitted campaign, then you can withdraw it for approval. Highlight the submitted campaign and select Withdraw Approval from the actions list to remove it from your approver’s task list.

Activate
Once the campaign is approved, it is automatically activated. If approval is not enforced, you can activate the campaign yourself by changing the status to Active. Once activated, the first stage begins according to the stage schedule. If your campaign has a stage with a fixed date, but the campaign is not approved by that date, the stage will not execute. You can't modify an active campaign unless you pause it.

Pause and Resume
If you want to adjust the design, you must pause the campaign. You can then make your changes, and, when they are complete, resume the campaign. Your changes will only affect stages scheduled to start after you resume the campaign. While a campaign is paused, no repeating stages will execute. If a stage has a fixed date that occurs while the campaign is paused, that stage will not execute. Once the campaign resumes, repeating stages will execute at the next scheduled time. You can also pause and resume the campaign without making changes, for example, to check that the campaign is still within budget.

Note: Some processes, such as sending a batch of e-mails, can't be paused once they have begun.

Terminate
To end campaign execution after the current stage has completed, select Terminate. A terminated campaign can't be resumed, but can be reactivated.

Duplicate Stage
If your campaign will have two or more stages that are largely similar, you can save time by creating the first iteration of the stage, and then using it as a template. Highlight the campaign and select Duplicate Stage to create a copy of it.
Redesign
If changes are necessary, you can pause, redesign and resume a campaign, or you can terminate, redesign and activate a campaign. If approval is enforced, you must request approval for the redesigned campaign.

Campaign Approval Processing: How It Works
This topic explains the profile options, resources, and statuses involved in the approval process.

Settings That Affect Campaign Approval
There are three profile options that affect campaign approval:

- **Enforce Campaign Approval Enabled** determines whether or not you must request and obtain approval for your campaigns before you can activate them.

- **Ad Hoc Campaign Approval Enabled** determines whether you can select a specific approver from within your management hierarchy, or if your campaigns automatically go to your direct manager for approval.

- **Approval Timeout Interval** determines the number of days after which approval requests automatically time out.

As campaign owner, you provide a completed campaign plan and design. Valid campaign approval statuses are:

- Draft
- Submitted
- Approved
- Rejected
- Expired

The following table shows the statuses and how they affect the campaign:

<table>
<thead>
<tr>
<th>Overall State</th>
<th>Campaign Approval Status</th>
<th>Campaign Execution Status</th>
<th>Edit Plan Without Re-approval?</th>
<th>Edit Design Without Re-approval?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before submitting approval request</td>
<td>Draft</td>
<td>Draft</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Submitted</td>
<td>Draft</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Post-Approval, Pre-Execution</td>
<td>Approved</td>
<td>Draft</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Post-Approval, Execution</td>
<td>Approved, New, In Progress, Completed</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
How Campaign Approval Works

Only the campaign owner can request approval, and the campaign design status must first be **Complete**. After the campaign is submitted for approval, the status is updated to **Submitted**. This prevents further changes.

The following preapproval checks are applied automatically when you submit a campaign for approval.

1. The treatment start and end dates must be within the planned start and end date of the stage.
2. The required launch interval is evaluated based on the supplier capacity limits set in the supplier profile for this treatment and the audience count allocated to the treatment. This must be less than or equal to the duration specified for the post launch activity in the Stage schedule.
3. If a promotion is associated with the treatment, the effective start and end dates of the promotion must overlap with the treatment duration. If there is only a partial overlap, you will receive an e-mail notification warning you of the situation.
4. The products associated with all the treatments in a stage must be checked to ensure that the segment definitions do not violate any of the nonavailability rules for the products on offer.

The approval worklist tracks campaign approval status, showing the date of each entry and any comments. You can sign in to review the status.

When you submit a campaign for approval, an e-mail notification is automatically sent to your approval resource. When the campaign is approved, an e-mail notification is automatically sent to you, and the approval status is changed to Approved. If the campaign is rejected, or if it times out, an e-mail notification is automatically sent to you. The approval worklist tracks all changes in campaign approval status. You can click an item in the worklist to drill down on the details and, if authorized, you can click a button to approve or reject it.

FAQs for Multistage, Multichannel Marketing Campaigns

What happens if I create a campaign from a template or an existing campaign?

Most planning and design attributes are copied. When creating from a previous campaign or from a template, the following elements are copied:

- Attachments
- Stages
- Audiences associated with stages
- Treatments associated with stages

When creating a campaign from a template, tasks from any task template associated with the campaign template are copied:

*Note:* It is the task template, rather than the campaign template, that determines which tasks are added to your copy. If the task template has changed since the campaign template was created, the tasks in your copy may not match those in the original.
The following elements are not copied:

- Campaign team
- Notes
- Allocations
- Schedules

What happens to existing campaigns if I update the campaign template?

Existing campaigns that were created from the template are unaffected. Your changes will only affect campaigns created after the template is updated. Campaign templates provide models to use as a basis when planning and designing multistage campaigns. When you use a template to create a multistage campaign, the template values are copied to the new campaign and the template's purpose then ends for that campaign.

How can I change the quick add list when designing multistage campaigns?

The Quick Add lists contain collections of favorite treatments and audiences. The lists reflect the most recent changes, as users add and remove items. In the contextual area, click the Edit List link below the Quick Add list you want to change. A window opens, showing all the items available for that list. You can select one or more items and use the arrow buttons to move your selection into or out of the Quick Add list.

What's the difference between updating the count and refreshing the allocation?

Updating the count recalculates the number of members in segments and segment trees. This is useful when the segment rules have been changed, or if you are revisiting the campaign design after an interval where many more contacts may have been added to the segment.

Refreshing the allocation recalculates the matrix where audience members are allocated to treatments. You can refresh your allocation of numbers or of percentages, or you can change between numbers and percentages.

What happens if I select the notify option for a stage schedule activity?

When the activity completes, or if it encounters an error condition, an e-mail notification is sent to the owner named for this step in the schedule.
What happens if I deselect the Enforce Approvals check box after campaign approval has started?

While approval is pending, a campaign can’t be changed. If you have authority to deselect Enforce Approvals, and decide that you don’t want to seek approval for your campaign, you must first withdraw the approval request.

Campaign approval is enabled by a profile option. If approval is enforced, you must obtain approval before the campaign can be activated. You can override the requirement for mandatory approval only if you have the marketing vice president role.

Can I submit a campaign for approval more than once?

Yes. If your approval request expires, or if you choose to withdraw it before it is approved, you can resubmit the approval request for the campaign with or without changes. If your approval request is rejected, you can make changes and then resubmit it.

How can I update campaign members before launching my multistage campaign?

The list of campaign members is generated during the load process. If you include a manual step to inspect data after the load process has completed, then you can preview and update campaign members before the campaign launch.

Social Marketing Campaigns

Oracle Social Marketing and Oracle Sales Cloud Marketing: How They Work Together

This topic describes how Oracle Social Marketing and Oracle Sales Cloud Marketing interact to help you create outbound e-mail campaigns using Oracle Social Marketing. Using Oracle Social Marketing, you can create social media content (Web forms on Facebook pages, Twitter Tweets, and so forth) and then track visitors’ responses to this content in an Oracle Sales Cloud marketing campaign. You can also use Oracle Sales Cloud Marketing to create outbound e-mail campaigns that point to social media content like Facebook pages or tabs. You can track visitors’ interactions with the content in an Oracle Sales Cloud marketing campaign.

The following steps correspond to the high-level process described in the figure:

1. Create a Web form on a Facebook tab, and publish it.
2. A Marketing campaign of type Social Site is automatically created.
3. A visitor visits the site and completes and submits the Web form.
4. The Marketing campaign gathers responses from visitors.
5. A marketer reviews the submitted results.
6. A marketer launches an outbound campaign (such as an e-mail including a link).
7. A recipient clicks on the link (for example, to a Facebook page containing a Web form) or clicks a "Tweet This" link to create a Twitter Tweet based on the campaign’s content.
8. The Marketing campaign gathers responses.
9. A marketer reviews the responses.

The following figure illustrates the interaction.

Facebook Tabs
After you have successfully connected to Oracle Social Marketing, you can create a Facebook tab that includes one or more Web forms that visitors can complete. When you publish a Web form to Facebook that you have created using Oracle Social
Marketing, Oracle Sales Cloud automatically defines a new Marketing multistage campaign that displays a subset of the campaign’s fields. The Oracle Sales Cloud campaign contains only a single stage, of the type Social Site. The campaign:

- Collects the responses from visitors who visit your Facebook page and fill out your Web form
- Tracks responses based on unique source codes assigned to each Web form

If you choose, you can associate the campaign containing the Social Site stage with another Oracle Sales Cloud Marketing multistage campaign. Your Facebook tab can contain multiple Web forms, or you can have multiple Facebook tabs, but each response includes its own unique code for tracking purposes.

**Campaign Responses**

After your Facebook tab has been published, visitors can view it and complete the Web form. When a visitor submits a Web form, a response is automatically generated and included in the Oracle Sales Cloud Marketing campaign. When a visitor to the site provides a response such as filling out a Web form, the relevant information is passed back to Oracle Sales Cloud. Responses are captured using special tracking information that is included in the links that a visitor clicks to access the campaign content. Using this tracking information, Oracle Sales Cloud can determine which visitors responded to which campaigns, and what sort of responses they made.

Marketers can go to the Campaign work area in Oracle Sales Cloud Marketing and view the responses in the Results area of the social campaign. The Responses tab shows all responses to the campaign, including the date and the name of the respondent.

**E-Mail and Web Page Customization for Outbound Campaigns**

When you create e-mail or Web pages as part of an Oracle Sales Cloud outbound campaign, you can include links to Facebook pages that include your content, or provide links that allow your recipients to send your content to their contacts using Twitter.

**Responses to Outbound Campaigns**

Oracle Sales Cloud Marketing tracks recipient or visitor responses to your campaign content, including:

- Clicking links to Facebook pages included in e-mail or on Web pages.
- Filling out and submitting Web forms created using Oracle Social Marketing.
- Sending preconfigured Twitter Tweets to their own Twitter feeds.

Oracle Sales Cloud Marketing includes the response information in the Results area of the social campaign. Marketers can visit the campaign’s Responses tab to view the results.

**Related Topics**

- Treatments: Explained

**Managing Social Marketing Campaigns: Highlights**

Oracle Social Marketing provides the tools and technology for you to implement social marketing strategies. The tab feature provides a content management system that you can use to create your own unique, branded tabs on Facebook. For example, you can create a simple calendar of upcoming events or a locator page that directs visitors to a marketing page.
Oracle Social Marketing interacts seamlessly with Oracle Sales Cloud Marketing by automatically creating a representation of the Facebook campaign in Sales Cloud Marketing. Marketing responses are then captured and measured along with other campaigns in Oracle Sales Cloud Marketing.

Social Marketing Features and Setup
- To learn more about the social marketing features and setup, see Sales Cloud Implementing Sales guide.
- For more information about using Oracle Social marketing, see Oracle Help Center at http://docs.oracle.com/.

Using Twitter Tweets in Marketing Messages: Procedure

You can include a preconfigured Twitter Tweet in the content of an e-mail to share your marketing content with recipients as part of a sales campaign. When the e-mail recipient clicks a button or link in the e-mail, Twitter displays the preconfigured content in a dialog box to allow posting to the recipient's Twitter feed.

Including a Preconfigured Twitter Tweet in an E-Mail

The preconfigured content you include in your Twitter Tweet can include a hash tag and a URL that points to your marketing content (such as a Facebook page, microsite, or Web page).

To include a Twitter Tweet in an e-mail:

1. Click the Tweet icon when creating e-mail content.
   - Clicking the icon takes you to a dialog box where you create your Twitter message. To help you with the 140-character limit, the dialog box displays the remaining characters left in the message.
2. Enter the text, any hash tags or mentions that you want to include, and a trackable URL that points to your content.
   - To reduce the number of characters in your Tweet, you can shorten the trackable URL by highlighting it and clicking the shorten URL icon.

   **Note:** The character count shown in the dialog box is an estimate to help you. It might not be accurate in all languages due to technical limitations.
3. You can point the URL anywhere you want, but if you want to share the content of the entire e-mail, you must direct it to the View as a Web Page URL. Click the View as a Web Page link in an e-mail to display the e-mail content in the browser instead of in the e-mail client. You use the E-mail as Link response form in the e-mail Edit Content page to insert a view as a Web page link into an e-mail.

Receiving the E-Mail

Recipients can click the Tweet This link in the e-mail, which routes them to the Twitter sign-in page (or directly to their Twitter home page if they’re already signed in to Twitter). The predefined Tweet content is displayed. The recipient can then choose to edit the content or to send the Tweet without any changes.

**Related Topics**
- Treatments: Explained
Defining Facebook Tabs in Oracle Social Marketing: Worked Example

After you have successfully connected to Oracle Social Marketing, you can create a Facebook tab that includes one or more Web forms that visitors can complete. This topic shows how to define Facebook tabs in Oracle Social Marketing.

Defining Facebook Tabs

To define your Facebook tabs, do the following:

1. In Oracle Social Marketing, navigate to Forms.
2. Enter your Oracle Sales Cloud user name and password, along with the URL to your Oracle Sales Cloud service.
3. Click **Link to Campaign**.

   The campaign is published to Facebook, and an Oracle Sales Cloud Marketing campaign is set up to collect the responses.

   After the form is published to Facebook, respondents can visit the page. Their responses, when filling out your Web form, are sent to your Oracle Sales Cloud Marketing campaign.

FAQs for Social Marketing Campaigns

What’s the difference between a social campaign and a marketing campaign?

A social campaign is initiated in Oracle Social Marketing. It creates a multistage campaign in Oracle Sales Cloud Marketing. The representation of the Oracle Social Marketing campaign is created as a multistage campaign with the type of Social Media. Responses captured from acting on third party social media sites (such as Facebook) are tied to the social media multistage campaign.

Within Oracle Sales Cloud Marketing, you can create multistage, mini, and sales campaigns that contain marketing messages. You can include links to Web sites, microsites, and social campaigns in these marketing messages using Oracle Social Marketing. If you want to create a reporting link between the marketing campaign and the social campaign, you can add a Related Social Site stage to your marketing campaign.

What’s a related social site stage?

A campaign stage that lets you associate a long-running social media multistage campaign to another multistage campaign so you can promote the social site. A social media multistage campaign is created when you publish a social media campaign using Oracle Social Marketing.
What social contact data does Oracle Social Marketing capture?

Oracle Social Marketing captures social contact profile data and adds it to the contact point information for your contacts. This data includes:

- The unique identifier a social network uses for a person (for example, 703546951).
- A person's public user name (such as ID, handle, or account name). Marketers can directly address marketing campaign information to contacts using the Facebook e-mail or Twitter handle. They can also use it to get the address for a contact’s Facebook Timeline page or public Twitter profile.

What social media response activities can Marketing track?

Using Oracle Social Marketing, responses are captured based on the following social media activities performed in campaigns that were created in Oracle Social Marketing:

- Facebook Like: A contact clicks the Like button on a Facebook page or on a Web site that includes a Facebook Like icon.
- Google+ +1: A contact clicks the +1 button on a Google+ page or on a Web site that includes a Google+ +1 icon.
- Social registration: A contact registers on the social network.
- Social site visit: A contact visits a social network site.
- Twitter mention: A contact is mentioned in a Twitter Tweet, posts a reply or shares a message using Twitter.

Manage Single-Channel Marketing Campaigns

Single-Channel Marketing Campaigns: Overview

This topic provides an overview of single-channel marketing e-mail campaigns. Sales representatives and sales managers can create single-channel e-mail campaigns for reaching out to contacts within their territories. Using sales campaigns, they invite contacts to an event or inform them about a product launch. Features of a marketing e-mail campaign include:

- The ability to target contacts from multiple sources including the contact repository, Lead and Opportunity contact lists, and previous campaigns.
- An easy-to-use guided process
- Access to e-mail templates
- A response gathering and monitoring capability
- The option to personalize e-mail for individual contacts
- The ability to schedule a campaign to launch on a specific date
- Automated follow-up for specific response types
The following figure shows the business process for campaigns:

To create a single-channel marketing campaign, start from the Campaigns work area, which you can access from the Navigator by selecting Campaigns under the Marketing section.

Sales Campaign Content: Explained

You can personalize your sales campaign by adding components such as images, merge fields and response forms. To create the content of your sales campaign, you can add any combination of the following:

- Images
- Merge fields
- Response forms
• Standard and ad hoc URLs
• Conditional content

Images
Add graphic images to your e-mail. You can provide a link to an image already on a server, or select a local file and upload it to the server. Specify the size and placement of the image. You can add a URL of a publicly hosted image using the `img src` tag.

Merge Fields
Personalize your e-mail message body by adding placeholders from a list of merge fields, such as the recipient’s first name. Merge fields are standard sets of attributes pertaining to an individual contact. You can insert them into your e-mail content. When you launch the campaign, merge fields are dynamically populated directly from the database. With sales campaigns you can also compose a personalized text message for each recipient. The personalized text feature is not available for multistage campaigns.

Response Forms
Insert response forms as active links in your e-mail campaign content. When a contact clicks one of the links, a specific response is automatically generated. All such responses are gathered and monitored, to track contacts’ actions. Available response forms for sales campaigns are:

• Forward to Friend
• Request Call Back
• Request More Information

Standard and Ad Hoc URLs
You can add any of the following types of URL:

• Standard URLs are predefined and commonly used across the enterprise.
• An ad hoc URL can be created when you define your e-mail content.

By default, all standard URLs are tracked automatically. You can optionally enable tracking for ad hoc URLs, or disable tracking for standard URLs. With tracking enabled, every time a contact clicks a link in a campaign e-mail, the click is recorded as a specific response, together with details pertaining to the URL.

Conditional Content
Conditional content is inserted or omitted based on the results of a rule. There are two elements that you can use to generate conditional content within an e-mail:

• If-Then-Else cases are used to determine if a block of text or HTML is removed from an outgoing e-mail, by verifying if a merge field value is defined. The merge field is defined if it is not an empty string or, for numeric merge fields, if it is not a value of 0 (zero). If the merge field is defined, the block of text or HTML remains in the outgoing e-mail. If the merge field is not defined, the block of text or HTML is removed from the outgoing e-mail.
• Named Blocks are used to decide whether or not to insert a block of text or HTML into an outgoing e-mail, by comparing one string to another. If the two strings are identical, the block is inserted.
Using Conditional Content in Sales Campaign Templates: Explained

Conditional content provides the ability to present relevant information to individual e-mail recipients without having to create multiple messages. There are two ways to generate conditional content within an e-mail sales campaign template:

- Block statement personalization
- If-Then-Else personalization

Conditional content and merge fields are available in both HTML and Text format e-mails.

Block Statement Personalization

Blocks determine whether to insert a block of text or HTML into an outgoing e-mail by comparing one string to another:

- If the two strings are identical, the block is inserted.
- If the two strings are not identical, the block is not inserted.

Note: The string comparison is case sensitive.

The following table lists components of the block personalization element.

<table>
<thead>
<tr>
<th>Personalization Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$(DefineBlock &quot;MatchString&quot;)</td>
<td>Starts a block of text or HTML that is inserted in place of an Insert Block component when MatchString is identical to the MatchString of the Insert Block component.</td>
</tr>
<tr>
<td>$(EndBlock)</td>
<td>Ends a block of text or HTML that was started with the Define Block component.</td>
</tr>
<tr>
<td>$(InsertBlock &quot;MatchString&quot;)</td>
<td>A block of text or HTML is inserted at the location of this component when MatchString is identical to the MatchString of a Define Block component.</td>
</tr>
</tbody>
</table>

The following is an example of a block personalization element:

```
You live in $(InsertBlock "${Account Country}").
$(DefineBlock "USA") <B>the United States.</B>
$(EndBlock)
$(DefineBlock "India") <B>India</B>
$(EndBlock)
```

In this example, if USA is entered in the Country field of the Account record, the following sentence appears:

> You live in the United States.

If a given recipient has no associated value for a block variable listed in the InsertBlock MatchString component, then nothing is inserted into the message for that block.

Inserting a Block Statement

To insert a block statement, do the following:

1. Display the e-mail template in the HTML editor.
2. Place the cursor in the location where you want to insert the block.

3. Create the Insert Block statement as follows:
   - In the editor toolbar, select **Insert Block** from the rule conditions drop-down list at the far left.
   - In the next drop-down list, select the record the field comes from: Contact, Account, or Campaign.
   - In the next drop-down list, select the field in the record.
   - Click **Insert**.

4. Create a Define Block component as follows:
   - In the drop-down list immediately above the e-mail and at the far left, select **Create Block**.
   - A $(DefineBlock "") and $(EndBlock) statement appear in the text.
   - Type a field value within the quotation marks of the $(DefineBlock "") statement.
   - This is the value that drives the content displayed in the block.
   - Type the text that you want to insert into the e-mail between the $(DefineBlock "") and $(EndBlock) tags.

5. Repeat Step 4 until you have added all the **Define Block** components that you need.

**If-Then-Else Personalization**

If-Then-Else personalization provides the ability to insert or remove text within your e-mail content, based on whether a Merge field value is defined. The merge field is defined if it contains a value or, for numeric merge fields, if the value is not 0 (zero).

- If the merge field is defined, the text remains in the outgoing e-mail.
- If the merge field is not defined, the text is removed from the outgoing e-mail.

The following table lists components of the If-Then-Else personalization element.

<table>
<thead>
<tr>
<th>Personalization Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$(if {Record.FieldName})</td>
<td>The If component is used to start an If-Then-Else personalization element. It determines whether the merge field named [FieldName] has a value. If there is a value for [FieldName], the text between this If-Then-Else component and the next If-Then-Else component is not removed from the e-mail.</td>
</tr>
<tr>
<td>$(elseif {Record.FieldName})</td>
<td>Ends a block of text or HTML that was started with the Define Block component.</td>
</tr>
<tr>
<td>$(else)</td>
<td>The Else component is used after a $(if) or $(elseif) component. If the preceding $(if) or $(elseif) component removes the preceding block of text or HTML from the e-mail, the $(else) component’s block of text or HTML is included in the e-mail. If the preceding $(if) or $(elseif) component does not remove it’s block of text or HTML, the $(else) component’s block of text or HTML is not included in the e-mail.</td>
</tr>
<tr>
<td>$(endif)</td>
<td>The End-If component closes the If-Then-Else personalization element.</td>
</tr>
</tbody>
</table>

The following is an example of a If-Then-Else personalization element:

```text
$(if ${Contact.First Name})
   Dear ${Contact.First Name}${Contact.Last Name},
$(else)
   Dear Mr. or Ms. ${Contact.Last Name},
```

---

**Oracle Sales Cloud**

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You can use If-Then-Else statements similarly to block statements, by including operators such as Equal to, Starts with, or Contains. You can select these operators from a drop-down list when you generate If or If-Else statements. Unlike blocks, this allows you to insert conditional content where the variable is true or not true.

For example, to customize the e-mail with a condition for accounts in the state of California, you use the following statement:

```
$(if ${Account.Bill to State} == "CA") Join us all month long for special events and workshops held in each of our California locations.
$(else) Join us all month long for weekly online workshops and special offers at www.mycompany.com/events.
$(endif)
```

You can also nest If-Then-Else statements, placing one within another.

**Note:** The components of personalization elements must be placed in the correct locations in the text. Any incorrect placement causes an error.

### Inserting a If-Then-Else Personalization Statement

To insert a If-Then-Else statement, do the following:

1. Display the e-mail template in the HTML editor.
2. Place the cursor in the location where you want the If-Then-Else statement.
3. Create the If or ElseIf statement as follows:
   - In the editor Toolbar, from the drop-down list at the far left, select either If or ElseIf.
   - In the next drop-down list, select the record the field comes from: Contact, Account, or Campaign.
   - In the next drop-down list, select the field in the record.
   - In the next drop-down list, select the operator.
   - In the next text box, enter the value that the field is compared with.
   - Click Insert.
4. Below the If or ElseIf statement, enter the text that appears if the condition in the statement is satisfied.
5. At the end of the entire If-Then-Else statement, enter $(endif).

### Related Topics

- Sales Campaign Content: Explained
- How Standard URLs and Marketing Content Fit Together
7 Launch Campaigns

Campaign Dates: Explained

When you create a multistage campaign, there are three dates that appear on the overview page. When the campaign executes, further dates show the progress of the stages. This topic explains each of these dates. The dates that appear on the overview page are as follows:

- Planned Start Date
- Execution Start Date
- Planned End Date

The Execution Details view shows the dates for every stage, including every iteration of repeating stages. In addition to the planned and actual start dates and times, and the planned and actual end dates, two application generated dates appear for every stage:

- Load Date
- Launch Date

Types of Campaign Dates

The types of campaign dates are described as follows:

<table>
<thead>
<tr>
<th>Campaign Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned Start Date</td>
<td>The planned start date for a campaign is the day and time when the first step in the schedule of the first campaign stage will start. In order to start, the campaign must have a status of Approved. If the campaign is not approved by the planned start date, it will not start. If the campaign is approved after the start date, it will start immediately.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> When you add a treatment to an Outbound stage or an Advertisement stage, the Activation Date and Expiration Date of the treatment appear. A stage must have start and end dates within the period when any associated treatments are active.</td>
</tr>
<tr>
<td>Execution Start Date</td>
<td>The execution start date is the date and time the campaign is activated.</td>
</tr>
<tr>
<td>Planned End Date</td>
<td>Enter this date when designing your stages, to indicate when you expect all iterations of all stages to have completed. If the campaign takes longer than expected, the date does not force an end to it. Any scheduled jobs that are not complete by the planned end date will continue processing until they are complete.</td>
</tr>
<tr>
<td>Load and Launch Dates</td>
<td>After the campaign is approved and activated, these two application generated dates and times appear for each executed stage in the Execution Details view. They indicate when the predefined, mandatory Load and Launch tasks, respectively, completed for each stage.</td>
</tr>
</tbody>
</table>
FAQs for Launch Campaigns

Why didn't execution processing start for a stage?

A stage in your campaign can fail to start for any of the following reasons.

- The campaign was not approved until after the stage start date.
- Approval was not enforced for the campaign, but the campaign was not activated before the campaign start date.
- The campaign member count exceeded the capacity for the third party supplier.
8 Understanding Responses

Response Management: Overview

Whenever prospects or contacts respond to an offer through a channel, such as inbound e-mail, Web, or call center, their responses are captured in detail using Oracle Sales Cloud Response Management functionality. You can review response details and convert qualified responses to sales leads.

You can determine which responses to pursue as leads or which ones you can convert to opportunities. Campaign channels can be different from response channels. Recipients of an internet campaign can respond through a call center. Recipients of a direct mail offer may respond by going to a Web offer URL. Marketing responses are generated because of marketing activities. Responses gathered from external call centers and marketing suppliers are imported in the application.

Web sites can capture response details, while phone calls or direct mail responses must be recorded manually. When these responses are recorded, you can import them. Inbound e-mail replies aren’t automatically captured as responses. You must configure your e-mail response product to support inbound e-mail processing. Each response type has several parameters that store details about a given response. You can modify an automatically captured response if you have permission. Responses are tracked for an offer and for a campaign.

Response Management Summary

Responses are captured either through file-based data import, or they’re automatically captured by recording the various clicks when opening e-mails associated with the marketing campaign. You can review imported and autogenerated responses and convert qualified responses to leads and opportunities.

Response Management Features

You can create responses provided by prospects and contacts, and you can convert responses to leads and opportunities. You can record campaign responses to:

- Calculate campaign response rates
- Target promotional material to those responders who are more receptive to offers
- Build a profile of responders to run targeted campaigns
- Extract and source key data from the responses to generate quality leads
Differences Between Response, Lead, and Opportunity: Explained

This topic describes the main differences between a response, a lead, and an opportunity.

<table>
<thead>
<tr>
<th>Response</th>
<th>Lead</th>
<th>Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>A response is an interaction initiated by the customer in response to a marketing stimulus. Every outbound marketing activity is a marketing stimulus.</td>
<td>A lead is an inquiry, referral, or other information, obtained through marketing campaigns, or other means that identifies:</td>
<td>An opportunity is a pending sale of a product or service that can be forecasted and tracked using summary data such as:</td>
</tr>
<tr>
<td>• Potential contact or prospect</td>
<td>• Potential revenue</td>
<td>• Potential revenue</td>
</tr>
<tr>
<td>• Specific purchase interest</td>
<td>• Sales stage</td>
<td>• Sales stage</td>
</tr>
<tr>
<td>You can create a lead if the specific purchase interest is not known when the lead is created. However, to qualify a lead you must record a primary purchase interest.</td>
<td>• Win probability</td>
<td>• Win probability</td>
</tr>
<tr>
<td></td>
<td>• Expected close date</td>
<td>• Expected close date</td>
</tr>
</tbody>
</table>

**Responses are created from interest recorded from responders in response to marketing activities. Responses include:**
- Providing answers to phone survey questions
- Subscribing to a list
- Replying to an e-mail response form request

**Leads are mostly created by automated lead capture or lead import processes which periodically create qualified responders as sales leads.**

**Leads are sometimes created from the response data of a contact or prospect who has expressed a need or interest in a product or service offered by the business.**

**Opportunities are created by sales administrators when they have identified a qualified lead with a potential revenue opportunity. Leads are converted to opportunities when significant sales investment is foreseen to close the deal.**

A salesperson can create opportunities from scratch, without previously having a response or lead created.

As interest for the product or service matures, responders are elevated as leads.

Responses are solely owned by Marketing and aren’t included as part of the sales forecast.

Leads are transferred between Marketing and Sales departments based on how the lead progresses through its life cycle. Leads aren’t included as part of the sales forecast.

Opportunities are solely owned by Sales who have complete responsibility for managing the life cycle of an opportunity.

Inclusion of opportunities in the sales forecast is at the discretion of the sales administrator. However, not all opportunities are included and the decision to include them may depend on your company’s requirements.
What's the difference between a response and an interaction?

In the context of marketing, a response signifies a recorded reaction of a prospect or contact to a marketing activity. An interaction is a record of communication between your company and the prospect or contact or customer.

The following table outlines the key points about responses and interactions:

<table>
<thead>
<tr>
<th>Responses</th>
<th>Interactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A marketing response can be converted into a sales lead for further qualification or sales opportunity to be pursued and included in sales forecasting.</td>
<td>An interaction is recorded when a communication occurs with customer contacts by means of any communication channel such as e-mail, phone, direct mail, or web.</td>
</tr>
<tr>
<td>Responses received by phone, e-mail, or web are saved and positive responses can be converted to sales leads and opportunities.</td>
<td>An interaction is typically created for each outbound and inbound communication. An outbound communication is initiated by a company employee such as a salesperson by a phone call, or marketing manager by means of an e-mail campaign. An inbound communication is initiated by a prospect or contact by means of web activity or through a call center.</td>
</tr>
<tr>
<td>Responses are typically captured by automated processes or are imported in the application.</td>
<td>Interactions for a particular customer or contact can be viewed in Customer Center.</td>
</tr>
<tr>
<td>A response captures information specific to the marketing activity such as marketing source codes and specific destination URLs.</td>
<td>The channel details on a marketing treatment include the option to create interactions when a response is created.</td>
</tr>
</tbody>
</table>

What happens when I convert a response to a lead?

A lead is created and becomes available for follow up from the Leads List view. As the user who converted the response to the lead, you are listed as the lead owner.
Glossary

campaign members
Individual contacts within segments and lists, selected to receive marketing communications by e-mail, direct mail or phone.

consumer
A consumer is a person, unaffiliated to an organization, who has the intent to purchase goods and services.

do not contact
A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to remove themselves from the subscription list associated with a marketing treatment.

infolet
A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

marketing list
A static selection of contacts for the purpose of communicating a marketing message by e-mail, direct mail or phone.

mini campaign
A simplified single stage communication platform that allows a marketer to interact with customers by e-mail or SMS.

multistage campaign
An integrated multichannel communication platform that allows a marketer to achieve a specific marketing goal or objective through customer interaction, strategic advertisements, and lead generation.

request call back
A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to request a call back.

springboard
The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

treatment
A marketing term that represents a combination of a marketing message for targeted audience members and delivery options for third-party suppliers.