Siebel

Marketing User Guide

September 2026

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Marketing User Guide

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Get Help

Preface

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

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *https://docs.oracle.com/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

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1 What's New in This Release

What's New in Siebel Marketing User Guide, Siebel CRM 26.7 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

What's New in Siebel Marketing User Guide, Siebel CRM 26.7 Update

Topic	Description
Creating an Analysis Load Format	New topic. This topic describes how to create an Analysis Load Format and configure its properties for delimiter-based or XML output.
Associating Analysis Load Format with Analysis and Analysis Collection	New topic. This topic describes how to associate an Analysis Load Format in the supported views.

What's New in Siebel Marketing User Guide, Siebel CRM 25.11 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

What's New in Siebel Marketing User Guide, Siebel CRM 25.11 Update

Topic	Description
Creating and Using Analysis for Web Marketing	New chapter. Describes how to create and use Analysis for Web Marketing.
Adding an Analysis to a Campaign	New topic. Describes how to add Analysis to a Campaign.

What’s New in Siebel Marketing User Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What’s New in Siebel Marketing User Guide, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Marketing Process Flow

Marketing Process Flow

This chapter describes the process flows for Oracle's Siebel Marketing. These process flows allow you to automate, design, and target marketing campaigns and programs. This chapter includes the following topics:

- *About Campaigns*
- *Roadmap for Executing Stand-Alone Campaigns from Start to Finish*
- *Roadmap for Executing Marketing Programs from Start to Finish*

> **Note:** The procedures in this guide assume that you do not use the Tree navigation control option to access screens and views. However, you can choose to use the Tree navigation control if required. For more information about setting navigation options, see *Siebel Fundamentals Guide* .

About Campaigns

A campaign is a marketing tool that is used to target and motivate specific segments of your customer base to achieve a specific result. Campaigns can be stand-alone or part of a multistage program. Stand-alone campaigns include the elements listed in the following table.

Element	Description
Offer	An *offer* is a single proposition or message that you want to present to your current and potential customers as part of a campaign. To present an offer through a specific channel or medium using a specific piece of collateral, you create a treatment for that offer. An offer can have multiple treatments, such as an email treatment and a phone treatment, and an offer can have multiple versions of treatments for the same channel. You can create different treatments to communicate an offer in different campaigns, but the campaign is a one-time instance of the treatment presented to a customer at a certain point in time. For more information, see *Creating and Using Offers and Treatments*
Treatment	A *treatment* is a channel-specific instance of an offer. A treatment can include details such as the HTML content, literature, delivery parameters, a call guide, and other details. A campaign can use one or more treatments. For a simple campaign, you can have only a single list or segment and a single treatment. In other campaigns, you might use multiple treatments by associating multiple lists or segments and then allocating which treatments each list and segment receives. For more information, see *Creating and Using Offers and Treatments*
Segment	A *segment* defines a target set of customers or prospects. A campaign can target one or more segments. For more information, see Oracle Marketing Segmentation Guide.
Source code	A *source code* is composed of multiple codes that represent information about the customer, and the offer sent to the customer. You use source codes to track the customers' responses and gauge the reaction to a campaign and its offers. An administrator creates the source code definitions for you. For more information, see *Siebel Marketing Installation and Administration Guide* .

Element	Description
Vendor	A *vendor* is a company that you retain to help you with a campaign, such as a printing house, a fulfillment house, and a telemarketer. An administrator enters the vendor information for you. For more information, see *Siebel Marketing Installation and Administration Guide* .

A stand-alone campaign is a campaign that is set up independently of other campaigns. The outbound treatments for the campaign would all be launched at the same time. If you want to combine multiple campaigns into a larger process, you can create a program. Programs have one or more stages so that you can schedule some campaigns in parallel to or as follow-ups to another campaign. For more information, see *About Multistage Programs*.

Note: The Siebel Bookshelf is available on Oracle Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Terminology

The following information lists some terminology used in Marketing Programs.

Element	Description
Programs	A *program* is a container for organizing, designing, and executing multistage, triggered, and recurring marketing programs using new or existing campaigns, lists, and segments. You can establish multiple stages for a marketing program. Each stage can have multiple campaigns, lists, segments, and segment trees. Subsequent stages can be based on a customer response or any other event. For example, a visit by a sales person to a premium customer might trigger a follow-up email to that customer for the selected product. For more information, see *Designing Marketing Programs*.
Stage	A *stage* is a group of campaigns that happen during a certain phase of a program. It can also contain responses and leads. For example, you might have a two-stage program where stage 1 has campaigns to generate demand and stage 2 has another campaign to convert responders from the previous stage into leads.
Responses	Response handling is essential in triggering follow-up stages. Whenever prospects or contacts respond to an offer treatment through any channel (by inbound email, the Web, a call center, or sales representative, and so on), their responses can be captured in detail. You can use this data to determine which contacts to pursue as opportunities. For more information, see *About Using Response Management*.
Waves	Waves are a method of phasing the delivery of a campaign or stage over time, or for phasing the delivery of treatments over time or for different vendors. For example, you want to extend an offer to millions of customers, but do not want to add more inbound call center staff to handle the load. Using waves, you can phase the delivery of treatments over any time delay (in hours or days) you need. For more information, see *Setting Up Waves for Campaign Loads*.

Roadmap for Executing Stand-Alone Campaigns from Start to Finish

This topic outlines the roadmap for executing a stand-alone campaign. For information about executing a marketing program (multistage campaigns), see *Roadmap for Executing Marketing Programs from Start to Finish*.

To execute a stand-alone campaign, complete the following tasks:

1. Create one or more target lists or target segments.

   See *Managing Lists* or Oracle Marketing Segmentation Guide.
2. Create offers and offer treatments.

   See *Creating and Using Offers and Treatments*.
3. Create a campaign.

   See *Planning and Designing Marketing Campaigns*.
4. Load the campaign.

   See *Loading Campaigns*.
5. (Optional) Set up distribution waves.

   See *Setting Up Waves for Campaign Loads*.
6. Launch the campaign.

   See *Launching Programs and Campaigns*.

Roadmap for Executing Marketing Programs from Start to Finish

This topic outlines the roadmap for executing a marketing program (multistage campaigns). For information about executing a stand-alone campaign, see *Roadmap for Executing Stand-Alone Campaigns from Start to Finish*.

To execute a marketing program, you must complete the following tasks:

1. Create a marketing program.

   See *Designing Marketing Programs*.
2. Create your target segments for each campaign.

   See Oracle Marketing Segmentation Guide.
3. Create offers and treatments.

   See *Creating and Using Offers and Treatments*.
4. Plan response handling.

   See *About Using Response Management*.

5. (Optional) Set up waves.

   See *Setting Up Waves for Campaign Loads*.
6. Launch the program.

   See *Launching Programs and Campaigns*.
7. Load the campaigns manually or schedule the stage for automatic execution.

   To load campaigns, see *Launching Campaigns Manually*. To schedule a stage, see *Scheduling a Stage Execution and Editing a Schedule*.

3 Planning and Budgeting for Marketing

Planning and Budgeting for Marketing

Siebel Marketing includes support for a variety of Marketing Resource Management processes such as defining initiatives, planning and budgeting, expense tracking, managing calendars, and collateral planning. This chapter describes how to develop marketing plans, initiatives, and budgets. It includes the following topics:

- *About Planning and Budgeting for Marketing*
- *About Marketing Initiatives*
- *Process of Creating Marketing Plans and Budget Requests*
- *About Developing and Tracking Budgets for Marketing Plans*
- *Using Loyalty Programs*

About Planning and Budgeting for Marketing

Siebel Marketing provides support for planning and budgeting for the marketing organization. Using marketing plans, marketing executives and managers can create high-level business plans that cover a broad set of tactics, including outbound and inbound programs, campaigns, and events. For each plan, the marketing executive or team can set goals and objectives, identify available funds, assign budgets, associate multichannel marketing tactics, share documents, and generate forecasts.

The following table explains some of the marketing terms used in this chapter.

Term	Description
Marketing Plan	*Plans* are used to associate a broad set of tactics, including outbound and inbound programs, campaigns, and events for a specific business unit (such as European Field Marketing), purpose, or time period. For each plan, users can include goals and objectives, associate budget requests, associate multichannel marketing tactics, and share documents.
Tactic	A *tactic* is a term that is used to describe any kind of internal marketing activity. Types of tactics include programs, event plans, and stand-alone campaigns.
Initiative	An *initiative* can be used to associate global plans and tactics with overall strategic initiatives or priorities. For example, initiatives might include entering a consumer market or increasing brand equity.
Marketing Fund	A *marketing fund* is an internal marketing budget managed by a department or cost center, such as Corporate Advertising, Event Marketing, Market Research, and Partner Programs.

Term	Description
Budget Request	A *budget request* is an internal request to release some of the money in a Marketing Fund for use on a marketing program.
Purchase Order	An account number issued by the purchasing application giving a marketing team authority to incur expenses.
Expense	A record associated with a tactic with an estimated amount (forecast amount) and an actual amount. For example, *Catering* or *Shipping*. The actual amount can be based on an Invoice list item or entered by the user directly.
Invoice	A bill from a vendor for services rendered to the marketing organization.

The Marketing Planning module can be applied to fit any organizational planning approach, including plans based on time periods (such as quarterly or annual planning cycles), business units, product lines, or any other management structure. Plans can be organized in hierarchies with any number of levels to support small marketing organizations as well as more complex planning processes.

Executives can also set high-level corporate objectives and then assign goals to each business unit that is participating in the plan. Each business unit can then create its marketing plan to meet its own assigned goals, forecast the organization's ability to achieve the assigned goals, and submit the plan for approval. Based on common goals and performance metrics, marketing organizations can develop their own set of key performance metrics and institute the use of those metrics for their marketing plans.

There are several phases to the planning and budget cycle. The following are some typical processes using Siebel Marketing Resource Management, although the process for your company might differ:

- Planning and Alignment Process. This process is usually performed one time a year or one time a quarter. In this process, your company executives establish the overall marketing budget amount for the planning cycle. Based on the company priorities, a rough budget amount is set for each department or cost center. Meanwhile, the marketing teams develop their proposed programs, and submit them for review as budget requests. Budget requests that have good potential are approved to continue planning. The total cost of the approved budget requests is used to finalize the exact budget amounts (marketing funds) for each cost center. After the budget is finalized, the finance organization enters the official fund amounts for that planning cycle.
- Budget Approval process (for internal programs). In this process, the owner of a marketing program submits a budget request to request that funds be allocated from a Marketing Fund to pay for the program (this step might have been done during the Planning and Alignment Process). If the program is being jointly funded by more than one cost center, then each cost center submits a budget request for its portion of the cost. The fund owner reviews and approves the budget request. After the budget is approved, the request details can be entered into a procurement application for additional approvals if required, so that a purchase order can be issued.
- Expense Tracking Process (execution phase). In this process, the marketing team executes a marketing program or event. During the course of the program, expenses are incurred. Before the final invoice is received, the estimated value of each expense is tracked using the expense line items, so that a forecast of the expense amount can be monitored. After an invoice is received from a vendor that was hired for the program, the invoice is sent to the Finance department, and the invoice and purchase order number can be associated with specific expenses under the program or event.
- Budget Adjustment Process. This process can occur at any point during the year. Usually this process happens at the end of a quarter when executives want to adjust the annual plan mid-cycle. This process might also occur if there is a change of strategy or the overall budget increases or decreases. In this process, the finance team or

fund owner can transfer money from one fund to another, or use an adjustment to directly increase or decrease the money in a fund.

About Marketing Initiatives

Many organizations establish a set of strategic initiatives for each year or quarter. Often these initiatives are defined by the CEO, CFO, or executive committee with the intent that all the company's marketing activities are aligned to achieve these initiatives. While some initiatives can represent quantitative objectives, such as *Grow the Premium Segment 10%*, they can also represent more abstract concepts such as *Enter a new market*.

The Siebel Marketing Initiatives feature allows you to define these initiatives for each planning cycle, and associate your marketing plans, budgets (funds), and tactics with these initiatives to measure alignment throughout the organization. It helps improve the alignment of the activities of individual teams with the corporate priorities by providing a visible association of high-level themes with day-to-day details, and helps you improve ROI (Return on Investment) for your marketing budget.

For example, you can:

- Define the priorities for your company or organization for a given period (year, quarter).
- Associate these priorities with marketing funds and budgets. (How much funding have you actually budgeted for each of the initiatives?).
- Associate the initiatives with each of your marketing tactics such as campaigns, programs, and events. (What specific marketing activities are you implementing to achieve this objective?).
- Analyze the success of marketing tactics. (You failed to meet this objective last year. Why? What specific tactics did you execute?)

For more information, see *Creating Initiatives and Linking Initiatives to Plans*.

Process of Creating Marketing Plans and Budget Requests

To create marketing plans and budget requests, perform the following tasks:

1. *Creating Marketing Plans*
2. *Creating Initiatives and Linking Initiatives to Plans*
3. *Setting Goals for Marketing Plans*
4. *Creating and Associating Tactics with Marketing Plans*
5. *Developing and Managing Marketing Funds*
6. *Creating and Submitting Budget Requests*
7. *Developing and Tracking Budgets for Marketing Plans*
8. *Associating Purchase Orders with Marketing Tactics and Budget Requests*
9. *Creating Line Items for a Purchase Order*
10. *Managing Marketing Assets and Collateral*
11. *Attaching Documents to Marketing Plans*
12. *Adding Expenses for Events, Campaigns, and Programs*

13. *Associating Invoices and Invoice Items with Expenses*

Creating Marketing Plans

You create a marketing plan in the Marketing Plans screen. The Marketing Plans list provides a list of the marketing plans to which you have access.

The visibility filter provides several levels of visibility, including the following views:

- My Marketing Plans displays marketing plans with which you are associated as a team member.
- All Marketing Plans displays marketing plans in your assigned organizations.
- All Marketing Plans Across My Organizations displays marketing plans that exist in your organizations and in any suborganizations in your organizations.
- All Marketing Plans Across Organizations displays the marketing plans that exist in every organization in your application.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

The following procedure shows how to create a marketing plan.

To create a marketing plan

1. Navigate to the Marketing Plans screen.
2. In the Marketing Plans list, create a new record, and complete the fields.

   The following table describes some of the fields.

Field	Description
Marketing Plan Name	(Required) The name of the marketing plan.
Plan Code	(Required) An identification code provided by you. Must be a unique value.
Type	(Optional) A list of the category types of marketing plans. Examples of possible values include Corporate, Regional, Business Unit, and Department.
Objective	(Optional) A text description of the objective of the marketing plan.
Planning Period	(Optional) You associate the planning period with the plan so that you can use it during categorization and reporting. For example, you might want to track a quarterly or annual planning period.
Execution Period	(Optional) The period in which the plan is to be executed.
Approval Status	A status field that indicates that the plan has been Approved, Declined, Submitted, or Needs Revision.

Field	Description
Approval History	Displays the history of approvals for the marketing plan.
Region	(Optional) A listing of regions that you can associate with this plan. Regions are organized using a region hierarchy.
Organization	(Optional) A multivalue field displaying organizations associated with the plan. Organizations that appear in this list have visibility to the plan.
Team	(Optional) A multivalue field containing members of the team for the plan.

Creating Initiatives and Linking Initiatives to Plans

You can create a marketing plan initiative and associate it with your plan to help you track and analyze the success of your marketing plan against overall corporate initiatives. In addition, you can associate existing marketing tactics and funds with the initiative, link to marketing collateral documents, and add notes to each initiative.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

Defining a Marketing Initiative

The following procedure shows how to define a marketing initiative.

To define a marketing initiative

1. Navigate to the Marketing Plans screen, then the Initiatives view.
2. In the Initiatives list, create a new initiative and complete the required fields.

   The following table describes some of the fields.

Field	Description
Name	The name of the marketing initiative.
Status	The status indicates whether the initiative is still in planning (not yet official), active, completed (for a past planning cycle), or is cancelled.
Planning Period	The period for the planned initiative. This period must align with the period for your marketing plans, marketing funds, and tactics.
Priority	The priority assigned to the initiative.

Field	Description
Executive Sponsor	If the initiative is owned by an executive sponsor, then this field allows you to select the name of the sponsor (employee).
Team	If the initiative is owned by a particular team, then this field allows you to add team members to the initiative.
Region	If the initiative applies to a specific region, then this field allows you to select it. Regions are organized using a region hierarchy.

Associating a Marketing Plan with an Initiative

The following procedure shows how to associate a marketing plan with an initiative.

To associate a marketing plan with an initiative

1. Navigate to the Marketing Plans screen, then the Marketing Plans view.
2. In the Marketing Plan list, query for the Marketing Plan.
3. Select the Plan Details tab, and then click the Related Initiatives field.
4. Associate one or more initiatives with the plan, and then save the record.

Associating a Marketing Fund with an Initiative

The following procedure shows how to associate a marketing fund with an initiative.

To associate a marketing fund with an initiative

1. Navigate to the Marketing Plans screen, then the Marketing Funds list.
2. In the Marketing Fund list, query for the Marketing Fund.
3. Select the Fund Details tab, and click the Related Initiatives field.
4. Associate one or more initiatives to the fund, and then save the record.

Associating a Marketing Tactic with an Initiative

The following procedure shows how to associate a marketing tactic with an initiative.

To associate a Marketing Tactic with an Initiative

1. Navigate to the Marketing Plans list, and click Initiatives in the link bar.
2. In the Initiatives list, click the Initiative name.
3. From the Initiative form, click the Marketing Tactics view tab.
4. Associate one or more initiatives with the tactic, and then save the record.

Associating Documents and Notes with an Initiative

The following procedure shows how to associate documents and notes with an initiative.

To associate documents and notes with an initiative

1. Navigate to the Marketing Plans list, and click Initiatives in the link bar.

2. In the Initiatives list, click the Initiative name.
3. From the Initiative form, click the Documents view tab or the Notes view tab.

Setting Goals for Marketing Plans

Each marketing plan can be associated with a set of goals. Each goal is a metric against which the performance of the plan is measured. If you need additional metrics that are separate from performance objective goals, then you can create assumptions for a goal. An assumption is a presumed factor in the achievement of a goal. For example, the goal of the campaign might be a 20% ROI, with the assumption that the total cost is less than $10,000.00. An assumption record uses the same fields as a goal record.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

The following procedure shows how to create a goal for a marketing plan.

To create a goal for a marketing plan

1. Navigate to the Marketing Plans screen.
2. In the Marketing Plans list, click a plan name.
3. In the Marketing Plans form, use the Type drop-down list to choose a type of plan.
4. Click the Goals view tab.
5. In the Goals list, click Apply Goal Template.

   The goals from the template populate the Goals list.

   > **Note:** The goal template is controlled by the Type field. If you apply the template with an incorrect type selected, then you can change the type and click Apply Goal Template again. If a template is not available, then a message appears indicating that there is no active goals template for the specified type that you chose in Step 3.

6. If a goal template is not available, then in the Goals list, create a new record.

7. In the new record, complete the fields using the following table as a guide.

Note: Make sure that you select the appropriate number format for the goal type.

Field	Description
Metric	Type of goal. Some of the values for this field are: o Average Cost per Lead. (Number Format equals Currency) The expected cost of the marketing activities in the plan divided by the number of sales leads generated. o Average Cost per Opportunity. (Number Format equals Currency) The expected cost of the marketing activities in the plan divided by the number of sales opportunities generated. o Average Cost per Order. (Number Format equals Currency) The expected cost of the marketing activities in the plan divided by the number of sales orders generated. o # Leads. (Number Format equals Integer) The number of sales leads this plan is expected to yield. The definition of lead might vary based on your company's business process. o ROI %. (Number Format equals Percentage) The Return on Investment percentage that this plan is expected to earn. o Unit Volume. (Number Format equals Integer) The number of product units that are expected to be sold as a result of this plan.
Number Format	The types of formats are Number (nonfinancial), Percentage (nonfinancial), and Currency (financial): o If you select the Currency number format (a financial goal), then complete the Target Amount field. o If you select a different number format (a nonfinancial goal), then in the Target Qty field, enter the target number for the goal. **Note:** If the goal has a Number Format of Percentage then be sure to enter whole number values, not decimal values. For example, an ROI goal of 15% must be entered as "15", not ".15".
Target Amount	If the number format is Currency, then use this field to specify the amount.
Target Qty	If the number format is anything other than Currency, then use this field to specify the number.
Forecast Amount or Forecast Quantity	If you know the expected forecast value, then enter it in the Forecast Amount or Forecast Quantity field. If you do not know the expected forecast value, then leave the Forecast Amount or Forecast Quantity field empty, and add the value after you develop a forecast.

8. (Optional) In the Assumptions form, create assumptions for the goal.

Creating and Associating Tactics with Marketing Plans

A plan tactic is a marketing program, event plan, or stand-alone campaign that you have associated with a marketing plan. A marketing plan can be associated with any number of marketing programs, event plans, or stand-alone campaigns:

- A marketing program is any program created in the Programs screen.
- An event plan can be any event plan created in the Events screen.
- A stand-alone campaign can be any campaign created in the Campaigns screen that is not associated with a marketing program.

You can create new tactics while developing your marketing plan or associate existing tactics with the marketing plan.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

Creating a New Plan Tactic and Associating it with a Marketing Plan

The following procedure shows how to create a new plan tactic and associate it with a marketing plan.

To create a new plan tactic and associate it with a marketing plan

1. Navigate to the Marketing Plans screen.
2. In the Marketing Plans list, click a marketing plan name.
3. Click the Plan Tactics view tab.
4. In the Plan Tactics list, create a new tactic.
5. In the new tactic record, complete the Tactic Name and Type fields.

CAUTION: Be sure to select the correct Tactic Type (Event Plan, Program, or Standalone Campaign) before saving the record, because the type cannot be changed after the record is saved.

Associating an Existing Plan Tactic with a Marketing Plan

The following procedure shows how to associate an existing plan tactic with a marketing plan.

To associate an existing plan tactic with a marketing plan

1. Navigate to the Marketing Plans screen.
2. In the Marketing Plans list, click a marketing plan name.
3. Click the Plan Tactics view tab.
4. In the Plan Tactics list, click Add.

   You can modify every field in this record except Type.
5. In the Pick Tactic dialog box, query for an event, program, or stand-alone campaign, and click OK.

   Note: Each tactic can be associated with only one marketing plan.

Developing and Managing Marketing Funds

Many marketing organizations, especially those that operate in multiple business lines and geographies, typically use disparate methods to track the sources, uses, and status of marketing funds. These methods might include the use of multiple, disconnected applications and media including spreadsheets, email messages, and departmental databases. Gaining control of these funds and maintaining a consistent view of the available fund balance is a challenge that is complicated by the lack of consistent processes across the organization.

By creating Marketing Funds, you can delegate spending authority to a particular department or cost center, and use Siebel Marketing to manage each budget. Because there is often a delay between the execution phase of a program and the date when all the invoices are received and processed in your back-office financial applications, your Marketing Funds and related tactics can provide a more up-to-date forecast with your organization's financial position.

Using Marketing Funds, an organization can:

- Establish a budget for each marketing department or cost center
- Draw money from these funds to pay for marketing tactics
- Transfer funds from one budget to another
- Adjust a fund with an increase or decrease (but not a transfer)
- Monitor current amounts for initial, allocated, committed, and spent funds

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

Creating Marketing Funds

Complete the steps in the following procedure to create a marketing fund.

To create a Marketing Fund

1. Navigate to the Marketing Plans screen and click Marketing Funds in the link bar.
2. In the Marketing Finds list, create a new marketing fund, and complete the required fields.

   The following table describes some of the fields.

Field	Description
Initial Amount	Indicates the amount delegated to the fund at the beginning of the planning cycle (typically an annual or quarterly cycle).
Allocated	Indicates the total Approved Budget amount from budget requests associated with the Fund.
Spent	Indicates the total of actual expenses from the tactics associated with the fund (using budget requests). If you have linked invoice line items to your tactic expenses, then this would represent the actual invoice amount. Otherwise, the actuals would be whatever was manually entered by users in the tactic-level expense records. **Note:** You must associate the Budget Request with the expense.

Field	Description
Fund Id	Automatically assigned when the record is created.
Approval Status	Indicates the status of the marketing funds approval. Options are Submitted, Approved, Declined, Needs Revision. If you change the status to anything other than Approved or Declined, then you must specify the name of the employee who will become the new owner.
Committed	Indicates the total of all purchase orders associated with budget requests from this fund. Note that the budget request and purchase order must both be associated with the same tactic.
Available	Indicates the Initial Amount minus Committed minus Net Adjustments minus Net Transfers.
Locked	When this check box is selected, the marketing fund can only be updated by a Marketing administrator.
Net Adjustments	Net amount (calculated) of all financial adjustments made to the Marketing Fund.
Net Transfers	Total transfers into the fund minus total transfers out of the fund.

Creating and Submitting Budget Requests

Use budget requests to request funds to pay for a marketing activity such as a campaign, event, or program. You can specify the amount of funding you need, associate the tactics related to the request, and submit the request for approval from the budget owner in your organization. Budget requests can be associated with a marketing plan or created and approved without establishing a relationship to a marketing plan. You can request funds for a single tactic from multiple budget owners. You can spread the money from an approved budget request across multiple tactics.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

Creating Budget Requests

The following procedure shows how to create a budget request.

To create a budget request

1. Navigate to the Marketing Plans screen.
2. In the Marketing Plans link bar, click Budget Requests.

3. In the Budget Requests list, create a new record, and complete the fields.

   The following table describes some of the fields.

Field	Action
Total Requested	Total amount of the budget request. This field must be completed, or the budget request cannot be submitted.
Approval Status	A status field that indicates that the plan has been Approved, Declined, Submitted, or Needs Revision.
Marketing Plan	Associates the request with the marketing plan.
Budget Request Id	Automatically populated.
Net Requested	By default, this field shows the same value as Total Requested, but it can be configured to calculate the net amount as total minus any partner contributions.
Approval History	Displays the history of approvals for the budget request (when Approval Status is Submitted).
Planning Period	Indicates the time period during which the request is active. For example, an annual or quarterly budgeting period.
Budget Category (G/L Account)	Choose a budget category for the request. The categories typically correspond to the values in the back-office accounting general ledger.
Line Number	You can use this field in any way that meets your business needs. For example, some general ledger applications generate a line number for each budget item.
Approved Budget	Specify the amount of money approved for the request. This field must only be used by employees with budget authority.
Region	Select the region authorized to spend the funds.
Type	The value corresponds to the categories that your organization uses to organize and review requests. For example, Direct Mail, Hospitality, Marketing Operations, and so on.
Fund	Identifies the Marketing Fund that provides funds for this budget request.
Organization	Associates the request with organizations that must have visibility to the request.

Field	Action

Associating Programs, Campaigns or Event plans with a Budget Request

The following procedure shows how to associate programs, campaigns or event plans with a budget request.

To associate programs, campaigns or event plans with a budget request

1. Navigate to the Marketing Plans screen.
2. Click the Budget Request link.
3. Click the Tactics view tab.
4. To associate an existing program, campaign or event, click Add, then select a tactic in the dialog box, and click OK.
5. To create a new tactic:
    a. Click New, and then enter a name.
    b. Select the type (Program, Event Plan or Standalone campaign).

> **Note:** After you select a tactic type and save the record, you cannot change the type.

You can now submit the budget request.

Submitting a Budget Request

After you create the budget request (making sure that the Total Requested field is complete), submit the budget request, using the following procedure.

> **Note:** Be sure that the marketing plan for the budget request is associated with a tactic before submitting the request. For instructions, see *Creating and Associating Tactics with Marketing Plans*.

To submit a budget request

1. From the Approval Status drop-down list, choose Submitted.
   The Pick Employee dialog box opens.
2. In the Pick Employee dialog box, select the employee to whom you want to submit the budget request.
3. (Optional) Add a comment to the request.

Approving or Declining a Budget Request

The following procedure shows how to approve or decline a budget request.

To approve or decline a budget request

1. Navigate to the My Approvals Inbox view.
2. Click the budget request name.
   The Budget Request view appears.
3. In the Approval Status drop-down list, choose Approved, Declined, or Needs Revision.
   The Pick Employee dialog box opens.

4. In the Pick Employee dialog box, select the employee who submitted the budget request.
5. (Optional) Add a comment to the request.

Associating a Budget Request with a Marketing Plan

The following procedure shows how to associate a budget request with a marketing plan.

To associate a budget request with a marketing plan

1. Navigate to the Marketing Plans screen.
2. In the link bar, click Marketing Plans.
3. In the Marketing Plans list, expand a Marketing Plan name.
4. Click the Budget Requests folder.
5. In the Budget Requests list, click Add.
6. In the Pick Budget Request dialog box, select the budget request, and click OK.

Note: If there are any tactics associated with the budget request that are not already associated with a marketing plan, then the tactics are then associated with the marketing plan.

Associating Budget Requests and Tactics with the Marketing Fund

When you submit a budget request, you must indicate the fund from which you want the money drawn. To indicate this, you must associate the fund with the budget request record.

The following procedure shows how to submit a budget request from a marketing fund.

To submit a budget request from a marketing fund

1. Navigate to the Marketing Plans screen.
2. Select the Budget Requests link.
3. In the Budget Request list, click the name of the Budget Request.
4. Click the Fund field.
5. Select the Fund, then click OK and save the record.

Managing the Marketing Fund

You can shift funds from one marketing fund to another and make other required financial changes to your Marketing Fund using the Transfers In, Transfers Out and Adjustments view tabs.

You can also view charts that provide Fund Analysis, Fund Allocation Analysis, and a Fund Allocation Trend Analysis by Region Brand, and Budget Category by Marketing Fund, and add notes to the fund.

Transferring Funds into or out of a Marketing Fund

The following procedure shows how to transfer funds into or out of a marketing fund.

To transfer funds into or out of a marketing fund

1. Navigate to the Marketing Funds list, and click the marketing fund name.
2. From the Market Fund form, click either the Transfers In or Transfers Out view tab.
3. In the Transfers In, or Transfers Out list, create a record and complete the fields.
   Amounts transferred in or out of the Marketing Fund are calculated and appear in the Net Transfers field of the Marketing Fund form. For a Transfer In, the To field is always the Fund that you selected. For a Transfer Out, the From field is always the Fund that you selected.

Making Adjustments to a Marketing Fund

The following procedure shows how to make adjustments to a marketing fund.

To make adjustments to a marketing fund

1. Navigate to the Marketing Funds list, and click the marketing fund name.
2. From the Market Fund form, click the Adjustments view tab
3. In the Adjustments list, create a new record and complete the fields.
4. Enter a comment to explain why the Fund amount was increased or decreased.

   For example, if there is a budget cut, then provide details so that other users can understand why the budget was changed.

   The Net Adjustment amount appears in the Net Adjustments field of the Marketing Fund form.

Viewing Marketing Fund Analyses

The following procedure shows how to view marketing fund analyses.

To view marketing fund analyses

1. Navigate to the Marketing Funds list, and click the marketing fund name.
2. From the Market Fund form, click the Charts view tab.
3. In the Charts view, specify the By value, and the Chart Type, and click Go.
4. Click the appropriate link on the link bar to view Fund Allocation Analysis, Fund Analysis, or Fund Allocation Trend Analysis results for your Marketing Funds.

About Developing and Tracking Budgets for Marketing Plans

The Marketing Plans screen also shows summary financial information based on items associated with the plan. This topic explains the source for each of the financial fields on the Marketing Plan.

Use the Marketing Plan form to review the forecast and actual expenses for the campaigns, events and programs in your organization. The marketing plan provides the following categories of values for viewing financial information:

- **Requested and Assigned Budget.** The Plan Tactics view tab contains two fields that show how much money the plan owner has requested (Requested Budget) and how much money has been approved by the budget owner (Assigned Budget). These fields can be edited.

- **Forecast and Actual Expenses.** The total forecast and actual expenses for all tactics in the marketing plan.
  - Forecast Expenses. Total forecast expense value for expense records associated with the tactics (programs, campaigns, and events) in the marketing plan.
  - Actual Expenses. Total actual expense value for expense records associated with the tactics in the marketing plan.

  The following table identifies the location of expense data for each type of tactic.

Tactic Type	Where to Find the Input Data
Event Plans	Navigate to the Events screen, Event Plans, Plan, and then the Expenses view.
Events	Navigate to the Events screen, Plan, and then the Expenses view.
Programs	Navigate to the Programs screen, Plan, and then the Expenses view, or navigate to the Campaigns screen, Plan, and then the Expenses view (for campaigns associated with programs).
Standalone Campaigns	Navigate to the Campaigns screen, Plan, and then the Expenses view.

- **Forecast and Actual Revenue.** The total actual expenses and revenues for all tactics in the marketing plan. The Plan Details view tab includes a Financial Summary section summarizing total revenues for the tactics in the plan.

  The following table identifies the location of revenue data for each type of tactic.

Tactic Type	Where to Find the Input Data
Campaigns	Navigate to the Campaigns screen, then the Plan view, and click Goals link.
Event Plans	Navigate to the Events screen, Event Plans, and then the Plans view, and click the Revenue link.
Programs	Navigate to the Programs screen, then the Plan view, and then click the Goals link.

- Forecast Revenue. A total of forecast values for revenue goals such as forecast amount for tactics in the marketing plan.
- Actual Revenue. The Total Order Revenue for orders associated with a tactic using values obtained from the Oracle Business Intelligence Server after the Siebel Data Warehouse is populated from the Siebel transactional database. If the value from the Oracle BI Server is not integrated into your environment, then the value is blank.

Developing and Tracking Budgets for Marketing Plans

You can use marketing plans to develop budgets. As you implement tactics, you can track the financial status of the marketing plan.

You can optionally use the Marketing Plan to track all the budget requests you have submitted to pay for the tactics in your plan. You do not have to use the Marketing Plan to submit budget requests for your tactics, but you might find it convenient to associate the budget requests here for easier tracking.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

The following procedure shows how to allocate funds from a budget request to tactics.

To allocate funds from a budget request to tactics

1. Navigate to the Marketing Plans screen.
2. In the Marketing Plans list, click a marketing plan.
3. Click the Budget Requests view tab, and verify that you have associated your budget requests and their related programs, events, and stand-alone campaigns.

   For more information on associating plan tactics, see *Creating and Associating Tactics with Marketing Plans*.
4. In the lower list of tactics for each budget request, if the Allocated Amount is not visible, then use the Columns Displayed option to add it:

   a. From the Tactics Menu, choose Columns Displayed.
   b. In the Columns Displayed dialog box, move Allocated Amount to the Selected Columns list and click Save.
5. In the Allocated Amount field for the Tactic, enter the portion of the budget request Approved Budget that you want to allocate to that tactic. If there is only one tactic for that budget request, then this amount must be 100%.

   If you developed forecast expenses for the tactic, then you can verify the plan is within budget by comparing your assigned budget to the forecast expenses.

You can also perform Step 4 and Step 5 directly on the Budget Requests screen.

Associating Purchase Orders with Marketing Tactics and Budget Requests

Purchase orders (POs) are approved purchase requests for marketing expenses. You can track committed spending by associating purchase orders with tactics and budget requests.

Note: Your company might approve and generate POs in a separate procurement application.

There are two types of purchase orders:

- Blanket PO. This type of purchase order is used for a recurring expense.
- One-time PO. This type of purchase order is used for a single instance of an expense.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

Associating Purchase Orders with Marketing Tactics

The following procedure shows how to associate purchase orders with marketing tactics.

To associate purchase orders with marketing tactics

1. Navigate to the Marketing Plans screen.
2. In the link bar, click Purchase Orders.
3. In the Purchase Orders list, create a new purchase order, complete the fields, and save the record.
   In the type field, you must specify either Marketing Purchase Order or Blanket Purchase Order. You can also select an existing purchase order.
4. Click the Tactics tab, then click the name of the program, event plan, or campaign.
5. Click the Plan view tab, then select the Purchase Orders link.
6. Click New. In the dialog box, select the purchase order that you created in Step 1 to Step 3.
   .

Associating Purchase Orders with Budget Requests

The following procedure shows how to associate purchase orders with budget requests.

To associate purchase orders with budget requests

1. Navigate to the Marketing Plans screen.
2. In the link bar, click Purchase Orders.
3. In the Purchase Orders list, select an existing purchase order, or create a new purchase order.
   If you are creating a new purchase order record, then you specify either Marketing Purchase Order or Blanket Purchase Order in the Type field.
4. In the Purchase Orders list, click the Purchase Order # link.
5. From the Purchase Order form, click the Budget Requests view tab, and then click Add to select an existing Budget Request.

> **Note:** The same tactic must be associated with the Budget Request and Purchase Order before you can see it in this dialog. This ensures that the budget request and purchase order are indeed related, since they are intended to pay for the same tactic.

Creating Line Items for a Purchase Order

Optionally, you can enter the line items that are associated with a purchase order. Usually you submit and approve purchase requests through your company procurement application, however, you can choose to use the purchase order screen as a system of record. You can use the line items view to enter the detailed line items that are part of your purchase request.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

The following procedure shows how to enter a purchase order line item.

To enter a purchase order line item

1. Navigate to the Marketing Plans screen.

2. In the link bar, click Purchase Orders.
3. In the purchase orders list, select an existing purchase order.
4. In the purchase orders list, click the Purchase Order # link.
5. From the purchase order form, click the Line Items view tab.
6. Click New to create a line item.
7. Enter a description, quantity and price for each item covered by the Purchase Order.

Managing Marketing Assets and Collateral

Using the Marketing Asset feature, you can track the physical inventory of your marketing collateral, monitory inventory status, and manage requests for vendors to replenish your marketing materials.

The Marketing Assets screen provides a running inventory of each collateral item, with visual indicators that show when collateral is likely to require replenishment. For more rigorous purchase processes, the fulfillment process supports tracking of vendors and multiple bids for fulfillment requests to make sure that the low price supplier is always used.

Marketing Assets is integrated with Siebel Content Center. Using Content Center, users can use version management for revision of content, and implement workflow-driven approval processes.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

Creating a Marketing Asset

The following procedure shows how to create a marketing asset.

To create a marketing asset

1. Navigate to the Administration - Content Center screen.
2. Select the Content Assets link.
3. Click New to create a new asset.
4. In the dialog box, enter a Name and Title for the asset, and then click File Options to browse for the file or URL options if you want to reference a URL to an online location.
5. Click OK to save the document.
6. Enter Activation and Expiration dates for the asset.
7. Select the Marketing Asset check box.

Tracking an Inventory of Marketing Assets

The following procedure shows how to track an inventory of marketing assets.

To track inventory of marketing assets

1. Navigate to the Marketing Asset screen.
2. Select the Marketing Inventory link.
3. Click New to add an asset to the inventory list.
4. In the location field, enter the Location where the inventory currently resides.

   > **Note:** To create a location, go to Administration - Location on the site map.

5. In the Quantity Available field, enter the current inventory amount for that location.

Creating Fulfillment Requests

The following procedure shows how to create fulfillment requests.

To create fulfillment requests

1. Navigate to the Marketing Asset screen.
2. Select the Fulfillment Requests link.
3. Click New to enter a request.
4. Enter the priority, date requested, and shipping location.
5. Save the record, and then click the Request # link.
6. Select the Pieces view tab, and then click New.
7. Select the Asset name field and specify the asset you want shipped and the quantity requested. Repeat this step for other assets you want fulfilled.

Tracking Bids for a Fulfillment Request

The following procedure shows how to track bids for a fulfillment request.

To track bids for a fulfillment request

1. Navigate to the Marketing Asset screen.
2. Select the Fulfillment Requests link.
3. Click on the Request # link.
4. Select the Bids view tab.
5. Click New to create a record for each supplier that is considered for fulfillment, and then select the Supplier name and set the Bid Status to Request Submitted.
6. In the Bid Items list at the end of the screen, enter the Asset, # of Units, and expected Unit Cost.
7. Repeat Step 5 and Step 6 for other suppliers.
8. When bids are received for a supplier, set the bid status to Bid Received and update the bid items list to reflect their submitted estimate.
9. When you select a supplier, set the bid status to Awarded Bid and update the Actual Cost field on the bid header.

Attaching Documents to Marketing Plans

You can attach planning documents to a marketing plan using the Documents view. These documents are visible to anyone who has access to the plan.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

The following procedure shows how to attach a document to a marketing plan.

To attach a document to a marketing plan

1. Navigate to the Marketing Plans screen.
2. In the Marketing Plans list, click a Marketing Plan name.
3. Click the Documents view tab, and attach the document to the marketing plan in either of the following ways:
    - If the document is a file on your computer or network, click New File, then navigate to the file and click Open.

- If the document is a Web page, click New URL, paste the URL into the URL field, and then click Add.

Adding Expenses for Events, Campaigns, and Programs

Using the Expense views for event plans, events, campaigns, and programs you can add the type and amount for each budget expense along with information, such as the purchase order number and invoice details. After you add expenses, the total forecast and actual values are calculated and displayed in the parent marketing plan for the tactic.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

The following procedure shows how to add expenses for a campaign, event, event plan, or program.

To add expenses for a campaign, event, event plan, or program

1. Navigate to the appropriate screen for your product:
   - For campaigns, navigate to the Campaigns screen.
   - For events, navigate to the Events screen, then the Events view.
   - For event plans, navigate to the Events screen, then the Event Plans view.
   - For programs, navigate to the Programs screen.
2. In the list, click a campaign, event, event plan, or program name.
3. Click the Plan view tab.
4. In the Plan link bar, click Expenses.
5. Create a new record, and complete the fields.
6. (Optional) For programs only, associate the expense with a specific campaign by choosing the campaign in the Campaign Name field, if appropriate.

   The following table describes some of the fields.

Field	Description
Expense (Campaigns and Programs only)	A reference name for the expense.
Campaign Name (Programs only)	A reference name for the campaign.
Purpose (Campaigns and Programs) Cost Type (Events and Event Plans)	The category for the expense.
Unit (Campaigns and Programs only)	Indicates if the expense is a fixed or unit (variable) cost.
Invoice #	The Id that corresponds to the invoice received. This information is available only if your company stores invoice information in the application. For more information, see *Associating Invoices and Invoice Items with Expenses*.

Field	Description
Purchase Order #	Associates the Purchase Order that must pay the expense. **Note:** The Purchase Order only appears if the purchase order type is Payable and the purchase order is associated with the tactic in the Plan screen, Purchase Orders view.
Assigned Budget (Campaigns only)	The amount budgeted for the expense.
Forecast # Units, Forecast Unit Cost, and Forecast Expense	Typically, the Forecast amount indicates the expected cost of the expense before the actual quote or invoice is received for the expense. The Forecast Expense column is calculated by multiplying Forecast # Units by Forecast Unit Cost.
Actual # Units, Actual Unit Cost, and Actual Expense	Typically, the Actual amount indicates the true cost of the expense after the quote or invoice is received. The Actual Expense column is calculated by multiplying Actual # Units by Actual Unit Cost.
Variance	Calculated as Actual Expense less Forecast Expense.
Event (Event Plans only)	Associates the expense with a specific event.
Session (Events and Event Plans only)	Associates the expense with a specific session.
Expense Date	Determines the correct exchange rate, if your application spans multiple currencies.

Associating Invoices and Invoice Items with Expenses

Invoice values are available only if your company stores invoice information in the application.

This task is a step in *Process of Creating Marketing Plans and Budget Requests*.

The following procedure shows how to associate invoices and invoice items with expenses.

To associate invoices and invoice items with expenses

1. Navigate to the Campaigns, Events, or Programs screen.
2. Click the campaign, event, event plan, or program name.
3. Click the Plan view tab.
4. In the Plan link bar, click Expenses.

5. In the Expenses list, locate the expense record to associate the invoice and Invoice item.
6. Click the Invoice Id # select button, query for the invoice number, and click OK.

   Note: Only Invoices with a type of Payable appear.

7. Navigate down to the Invoice Line Items list, and click Add.
8. In the Pick Line Items dialog box, select one or more line items to associate with the expense.
9. Click Update Actual Cost to update the Actual Expense field on the expense record.

Note: You can associate different line items from the same invoice with different expense records.

Using Loyalty Programs

Loyalty programs are available in Siebel Loyalty Management only.

You can associate a campaign with your loyalty promotions by first associating the loyalty program with a marketing plan. Any expenses for the loyalty promotion are then rolled up to the marketing plan and appear in the audit trail.

Associating a Loyalty Program with a Marketing Plan

The following procedure shows how to associate a loyalty program with a marketing plan.

To associate a loyalty program with a marketing plan

1. Navigate to the Marketing Plans screen.
2. Click a marketing plan.

   The Plan Tactics view tab appears.
3. Click the Plan Details tab.
4. In the Marketing Plan Details form, select a Loyalty program in the Loyalty program field.

Associating a Loyalty Promotion with a Campaign

The following procedure shows how to associate a loyalty promotion with a campaign.

To associate a loyalty promotion with a campaign

1. Navigate to the Marketing Plans screen.
2. Click a marketing plan.

   The Plan Tactics view tab appears.
3. Add a new plan tactic, selecting Standalone Campaign in the Type field.
4. Click the plan tactic.
5. Click the Design view tab.
6. Click the Related Loyalty Promotions link.

A list of Loyalty promotions that are associated with the selected Marketing plan appears.

7. To associate a new promotion with the campaign, click the New button, then select the promotion you want to associate in the Promotion field.

   After you have added a promotion, the Create Enrollment and Create Eligibility buttons become active and can be selected. These buttons can be used as follows:

   - **Create Enrollment.** Enrolls all contacts you have associated with the campaign who are Loyalty program members to the selected promotion.

     For information on associating a contact with a campaign, see *Associating Lists of Prospects or Contacts with Campaigns* and *Adding Contacts and Prospects to Campaigns Individually*.
   - **Create Eligibility.** Makes all contacts you have associated with the campaign who are Loyalty program members eligible to enroll in the promotion.

     Eligible members can then be enrolled into the promotion manually, either by using Siebel eLoyalty self-service options, or by being enrolled by a member service representative (MSR).

After selecting either the Create Enrollment or Create Eligibility buttons, you can verify a member's status in relation to the selected promotion by navigating to the Loyalty Members screen, selecting the relevant member, then selecting the Promotions link bar. Select the Enrolled Promotions tab to view all promotions the member is enrolled in, or select the Applicable Promotions tab to view promotions the member is eligible to enroll in if he or she chooses.

> **Note:** Before selecting either the Create Enrollment or the Create Eligibility buttons, make sure that you have associated contacts with the campaign, and that the promotion you have associated with the campaign is valid. If you do not, an error message is displayed when you select either button.

4 Designing Marketing Programs

Designing Marketing Programs

This chapter describes how you can use the Program screen's Program Flow view and the Program Explorer view to design and execute programs using new or existing segments, lists, and campaigns. It includes the following topics:

- *About Designing Marketing Programs*
- *Process of Designing Marketing Programs*
- *About Multistage Programs*
- *About the Program Execution Workflow*
- *Creating Programs*
- *About Using the Program Flow View*
- *Setting Up a Program Flow*

About Designing Marketing Programs

A *program* is a multistep dialogue in which you can set up a series of communications to your customers and prospects. In the Programs screen, you can use the graphical Program Flow view or the Program Explorer view to design and execute multistage, triggered, and recurring marketing programs using new or existing campaigns, lists, and segments.

You can establish multiple stages for a marketing program. Each stage can have multiple campaigns, lists, segments, and segment trees. Subsequent stages can be based on a customer response or any other event. For example, a visit by a sales person to a premium customer might trigger a follow-up email to that customer for the selected product.

In the workspace, you can use the right-click menu to manually start Marketing Server tasks. To schedule server tasks to be started automatically, use the Schedule calendar.

The graphical Marketing Program Flow designer is integrated with the workflow engine and Marketing Server. Therefore, when defined, the entire program can be automated from the initial customer segmentation through communication, to response collection and analysis. This capability is especially useful when programs are set to recur, such as a monthly welcome package campaign to new customers.

In previous releases, allocation was done across campaigns, and segment trees were at the stage level. Now, segmentation is performed within a campaign, a campaign is a direct child of a program, and a stage is an optional attribute of a campaign.

Process of Designing Marketing Programs

To design marketing programs, perform the following tasks:

1. *Creating Programs*

2. *Adding Stages to Programs*
3. *Specifying Repeating Stages Within Programs*
4. *Adding Lag Time Between Stages Within Programs*
5. *Adding Campaigns to Stages*
6. *About Using Triggers with Campaign Stages*
7. *Associating Segments with Campaigns*
8. *Adding Imported or Internal Lists to Campaigns*
9. *Adding Trees to Campaigns*
10. *Adding Responses to Programs*
11. *Applying Funneling with Constrained Connectors*
12. *Applying Lead Creation to a Program*
13. *Setting Up Waves for Campaign Loads*
14. *Creating and Applying Program Templates*
15. *Executing Programs*

Related Topics

About Multistage Programs

About the Program Execution Workflow

About Using the Program Flow View

Process of Loading Customers in Campaigns

Launching Programs and Campaigns

About Multistage Programs

Siebel Marketing supports both single-stage and multistage marketing programs. In a single-stage program, contacts are targeted in a stand-alone campaign, with no follow-up campaigns planned. During a multistage program, contacts in the first stage receive follow-up treatment in the program's second and third stages, often based on the contact's response to the original campaign. Multistage programs use stages to mark each phase of the program, campaigns to track separate instances of marketing messages, and campaign waves to track each batch of customers that are contacted. The following are types of multistage programs:

- **Marketing program with recurring campaign.** Scheduled to recur at standard intervals or specific times (daily, weekly, monthly, quarterly, yearly). For example, your company sends out a welcome kit and free gift to new customers on a monthly basis. Each month, a program stage occurs, new customers are identified (based on the segment criteria of account longevity of less than a month), and the welcome campaign is launched.
- **Event-triggered marketing program.** Provides a follow-up activity based on an action. For example, a customer visiting a product catalog might trigger an email offer to that customer based on items included in the customer's cart. If no response to the email is received, then a telesales campaign launches to offer the customer a special offer on the product.
- **Response triggered marketing program.** Uses response data to drive the next stage of the marketing program.

  For example, the marketing manager of a bank designs a program implementing the company's goal of increasing the number of bank-affiliated credit card customers. Within the program, he creates a campaign with two offers and two treatments, one offering a card with 10% interest and a $25 annual fee, the other offering

14% interest but no annual fee. These treatments are sent to 250,000 of the company's customers who do not already have credit card accounts with the bank.
After 30 days, response information is used to:

- Send a welcome packet of information to each new credit card customer who responded to one of the treatments.
- Offer an 8%, $25 annual fee card to everyone who did not respond.

When using repeating stages, be sure that your segment criteria exclude customers who were targeted in any previous wave of the same campaign or stage. This precaution prevents the customers from receiving redundant messages.

About the Program Execution Workflow

Multistage programs can be launched manually or automatically scheduled using the calendar. When you use the calendar, it can trigger key events such as loading a campaign (list generation) and launching a campaign (sending lists to vendors and sending offers to targeted contacts). The Program Schedule drives the process, with activities triggering the execution of each program. Each of these key events can be executed manually, using the Program Flow menu or the Program Explorer menus.

The Stage Execution workflow process shows how executing a program, loading a campaign, and launching a campaign occur in a multistage process.

When a stage or campaign is scheduled, the application applies a predefined allocation matrix for each campaign that links segments to each treatment. Campaigns are loaded and launched, and if the stage is scheduled to repeat, then the next occurrence of the stage is scheduled. Each stage of a program is a unique event, and Siebel Marketing tracks campaign and response history at the unique campaign wave and treatment level (for each run). For more information about workflow processes and the Siebel Business Process Designer, see Siebel Business Process Framework: Workflow Guide and Siebel Business Process Framework: Task UI Guide.

Creating Programs

When you create a new program, you specify an objective, a type (for example, Cross-sell or Win-back), a status (Active, Completed, or Planned), a revenue goal, and a budget figure.

When you add organizations to a program, any campaign that you add to a program (using the program flow or program explorer) inherits the program's organizations. The campaign that you add retains any existing organizations and existing lead partner.

The organizations in the campaign represent the union of the program's and campaign's organizations. After you add the campaign to the program, changes made to the organizations at the program are not reflected at the associated campaign level. Segments added to the program do not inherit the organizations. For more information, see *Creating Campaigns*.

Note: You can turn off the teams and organizations inheritance features in Siebel Tools. In the appropriate business component, change the User Prop value for the Copy Teams and Copy Organizations property from Y to N. For more information, see Siebel Tools Online Help.

You can attach documents and other files and view program stages and status. In addition, you can add team members, activity plans, events, and design the actual program flow, using a graphical designer workspace.

Creating a Program

The following procedure shows how to create a program.

To create a program

1. Navigate to the Programs screen.
2. In the Programs list, create a new record and complete the fields.

   Use the following table as a guide.

Field	Comment
Program Code	(Required) The program component of the source code. Specify a unique code for the program. It defaults to Row ID. You can choose to overwrite this manually, provided that the value you specify is unique.
Status	The default program status is In Planning. Options are Active, Cancelled, Completed and Scheduled. The status changes from In Planning to Active, and then Completed during program execution. Manual execution of the program does not affect this field.
Type	Choose a program type from the following list: Acquisition, Awareness, Cross-Sell, Loyalty, Referral, Retention, Up-Sell, Win-Back, Other.
Planned Start/Planned End	(Required) Defaults to the current date and time. Use the select button to change the defaults.
Execution Period	A period of time during which the program is to be executed.
Approval Status	A status field that indicates that the plan has been Approved, Declined, Submitted, or Needs Revision.
Approval History	Displays the history of approvals for the budget request.
Priority	Choose a priority from 1 to 4.
Duration (in days)	Calculated as the number of days between the program's Planned Start and Planned End. This value updates when you save the record.
Region	Choose the region to which the program is related.

Field	Comment
Organization	Click the Organization select button, and select the predefined organization to be responsible for the program. An organization that you assign to a program is inherited by campaigns in that program.

3. Save the program.

Adding Detailed Information to Programs

The following procedure shows how to add detailed information to programs.

To add detailed information to programs

1. Navigate to the Programs screen, then the Program list. Click an existing program in the program list.
2. Click the Program Details view tab and complete the fields.

   Use the following table, which describes fields in the Programs Details view, as a guide.

Field	Comment
Objective	Enter a text description of the objective for this program.
Product Lines	Click the Product Lines select button to select product lines that this program promotes.
Products	Click the Product select button to select products that this program promotes.
Lead Partner	Choose a partner organization to associate with the program. The Lead Partner is limited to the organizations associated with the program.
Summary	Enter a summary that describes the program's goals.
Program Template	Indicates the name of the program template (if any) that has been applied to this program.
Default Source Code Format	Click the Default Source Code Format select button to select a default source code format for this program.
Marketing Plan	Shows the parent Marketing Plan if the program is associated with a Marketing Plan.

Field	Comment
Planning Period	Click the Planning Period select button to associate the planning period with the plan. The period is associated with the plan for categorization and reporting purposes. For example, you might want to track a quarterly or annual planning period.
Budget Request	Indicates the budget requested for this program.
Requested Budget	Enter a requested budget amount.
Assigned Budget	Click the Budget select button to select the program's currency code, exchange date, and budget amount. The budget value is a top-down (descending) figure, rather than a calculatebottom-up (ascending) figure.
Forecast Expenses	This read-only field displays the sum of the expense data added in the Forecast view for campaigns associated with the program.
Actual Expenses	Indicates the actual expenses associated with this program.
MDF Requested	Indicates the Marketing Development Funds (MDF) associated with this program. This association is made on the MDF Pre-approval in the Marketing Purpose field.
Net Expense (forecast)	Calculated as Actual Expense less MDF Requested.
Forecast Revenue	Indicates the sum of the revenue predictions (based on data added in the Goals view) for campaigns associated with the program.
Actual Revenue	Indicates the actual revenue associated with this program.

3. Save the record.

About Using the Program Flow View

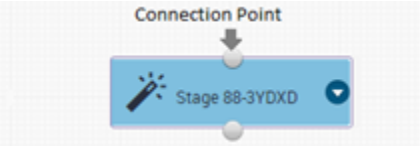
The logical flow for both single-stage and multistage programs is designed using the Program Flow view. In the Program Flow view, you graphically define the program's single-stage or multistage logic by selecting and moving program component objects such as campaigns, events, and stages into the workspace from a palette. You associate the objects to one another using connection points on the object.

Note: The Program Flow workspace is not designed to contain a large number of object icons. Placing more than 100 object icons on the workspace can distort the appearance of the Program Flow view.

You can manually execute the program from the Program Flow view or execute the program by scheduling a stage.

Connecting Objects

You connect objects in the Program Flow workspace using connection points on the object. The connection points on an object are usually located over and under the object as shown in the following image.



Objects can be connected using either the upper or lower connectors. However, when you connect an object to an endpoint object, the connector must start from the lower connection point of the source object and end at the upper connection point of the target object.

To connect objects

1. To connect an object to another object, select the connection point on one of the objects and, without releasing the selection, then move it to start the connection.
2. Place the connection on the relevant target object and then release the selection.
   Once you select the connection point on an object, the connection points on any other object in the workspace where the connection can be dropped are highlighted.

   > **Note:** To create a constrained connector, navigate to the Connector object in the palette and change the Constrained attribute to ON by selecting the button before creating the connector. For information about constrained connectors, see *Applying Funneling with Constrained Connectors*.

Setting Up a Program Flow

This topic describes how to set up a program flow. Before starting to create the program flow, make sure you have completed all the tasks listed in *Required Tasks*.

To set up a program flow, perform one or more of the following tasks:

1. *Adding Stages to Programs*
2. *Specifying Repeating Stages Within Programs*
3. *Adding Lag Time Between Stages Within Programs*
4. *Adding Campaigns to Stages*
5. *About Using Triggers with Campaign Stages*
6. *Adding Triggers to a Campaign Stage*
7. *Associating Segments with Campaigns*
8. *Adding Imported or Internal Lists to Campaigns*
9. *Adding Trees to Campaigns*
10. *Adding Responses to Programs*
11. *Applying Funneling with Constrained Connectors*
12. *Applying Lead Creation to a Program*
13. *Setting Up Waves for Campaign Loads*
14. *Creating and Applying Program Templates*

15. *Executing Programs*

Required Tasks

Before setting up a Program Flow, verify that the following tasks have been completed:

- Define segments and lists and associate them with the campaigns.
- Define campaigns and associated offers and events.
- Define segment trees, if required.
- Define responses and leads, if required.

Adding Stages to Programs

Use the following procedure to add a stage to a program, using the Program Flow workspace.

To add a stage to a program

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. Click the Design view tab.
4. In the Program Flow workspace, select the Stage object from the palette, and move it onto the workspace.
5. To complete stage details, double-click the stage object in the workspace.
6. In the Schedule view tab, in the Details list, add or modify stage details.

   Use the following table, which describes Details list fields, as a guide.

Field	Comment
Objective	Enter the program's objectives.
Stage Code	The default is the record identifier for the stage. Change the identifier for the stage source code if desired, but make sure the value is unique.
Stage Name	Name of the stage. Change the stage name from the default value to something more meaningful such as Stage 1: Summer Program.
Summary	Enter summary text that describes the stage's implementation.

Note: To display more fields, click the Details menu button, and then choose Columns Displayed.

Specifying Repeating Stages Within Programs

In most multistage programs, each stage occurs only one time, separated by a specified number of days between stages. In some circumstances, you might want to have a follow-up stage repeat at a different frequency than a previous stage. For example, in Stage 1, you send a direct mailing with a Web site link to a large audience. In Stage 2, every day you monitor the Web site mentioned in the direct mail offer and call any customers who visit the Web site immediately. In this example, Stage 1 only occurs one time, and Stage 2 repeats daily until the end of the campaign.

Note: When using a repeating stage, be sure that your segment criteria exclude customers who were targeted in a previous wave of the same campaign or the same stage.

The following procedure shows how to specify a repeating stage.

To specify a repeating stage

1. Navigate to the Programs screen.
2. In the Programs list, click a multistage program.
3. Click the Schedules view tab.
4. In the Schedules link bar, click Details.
5. In the Stages list, select a stage to repeat.

Note: You cannot repeat Stage 1.

Adding Lag Time Between Stages Within Programs

You can use the Wait shape in the Program Flow workspace to specify a lag period between stages in a multistage program.

The Wait shape can only be used between stages and the lag time is applied only if the first stage executes successfully. If the first stage fails due to an error, then the second stage will not execute.

Multiple Waits are allowed between stages. For example, you can set a 5-minute lag (Wait 1) to occur between Stage 1 and Stage 2, and also set a 10-minute lag (Wait 2) to occur between Stage 1 and Stage 3. Both stages can be scheduled from Stage 1.

The following procedure shows how to add lag time between stages.

To add lag time between stages

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. Click the Design view tab.
4. In the Program Flow workspace, select the Wait object from the palette, and move it onto the workspace.
5. To complete lag time details, double-click the Wait object in the workspace.
6. Use either a normal or constrained connector to connect the Wait object to a stage.

   For more information on constrained connectors, see *Applying Funneling with Constrained Connectors*.

Adding Campaigns to Stages

This topic describes how to add existing campaigns to program stages and how to create new campaigns for programs.

Adding Predefined Campaigns with Associated Offers to a Stage

If you previously created a campaign, then you can add it to a program stage using the following procedure.

To add predefined campaigns with associated offers

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. In the Program Flow workspace, select the Stage object.
4. In the Objects palette, select the Campaign object and move it from the palette to the workspace.
5. In the Pick Campaign dialog box, select the campaign, and click OK.

   Note: If the campaign you want is not listed in the Pick Campaign dialog box, then it might be already associated with another program. Although offers are reusable, campaigns are not. Use the My Campaigns or All Campaigns view to determine which program is using the campaign. Then, create a new campaign with a different name and the same offers.

Creating a New Campaign for a Program

The following procedure shows how to create a new campaign for a program.

To create a new campaign for a program

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. In the Program Flow workspace, select the Stage object.
4. In the Objects palette, select and move the Campaign object from the palette to the workspace.
5. In the Pick Campaigns dialog box, create a new record, enter a name and description for the campaign, and click Save.
6. In the Pick Campaign dialog box, select the campaign, and click OK.
7. In the workspace, double-click the Campaign object to open the Design view, then Offers view.
8. To add one or more treatments:
   a. Click New in the Offers list and select an offer.
   b. Click the Treatments list and select one or more treatments for that offer.

Note: To gauge response to the offer, in some marketing programs, a control segment of customers can be targeted by a test campaign with no associated treatment. For more information, see *Testing Campaigns That Have Email and Fax Treatments*.

About Using Triggers with Campaign Stages

Triggers detect an event automatically and trigger the appropriate program stage. Actual event detection is performed by an external event triggering framework, such as a third-party database trigger, Oracle Business Activity Monitoring

Engine (BAM), or workflows that monitor the creation of records in a Siebel OLTP table. The event detection application notifies the Siebel Marketing application to implement a trigger.

The integration point between the external detection application and Siebel Marketing is an event repository, which stores references to event definitions and key parameters that the program might need from the event application. The Create Event Trigger and Execute Event Trigger SOAP API Web services allow the external event detection application to populate the event repository with data for the event attributes. For more information on Web services, see Siebel CRM Web Services Reference. You can manage the event repository by navigating to the Administration-Marketing screen, then the Triggers view.

Note: A triggered stage cannot be scheduled. A scheduled stage cannot be triggered.

Trigger-Based Execution of Marketing Programs

Once a trigger is associated with a campaign, the event capture application sets the steps illustrated in the figure in this topic in motion. These steps are as follows:

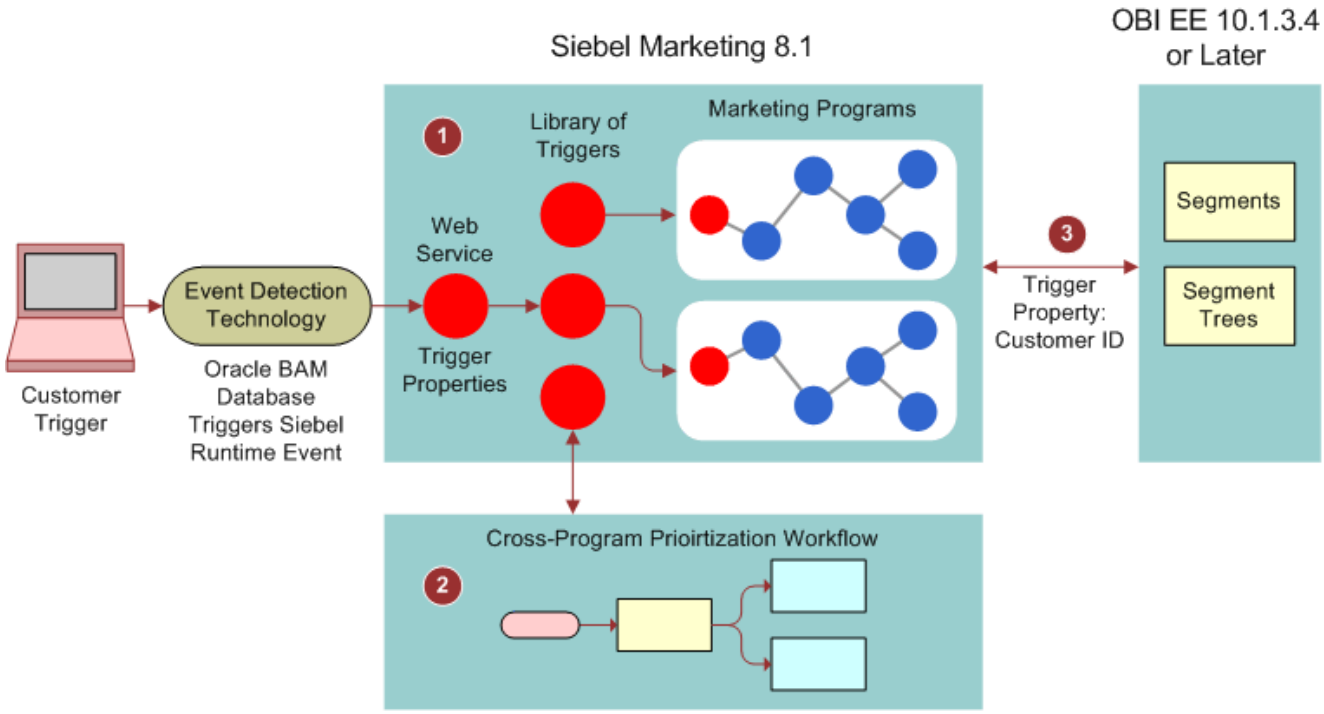
1. The trigger service receives the event and maps the trigger to all eligible programs.
2. The event capture application determines the programs that are executed as follows:
    - If a custom workflow has been created to handle cross-program prioritization, then this workflow is invoked to return the set of programs to execute. The custom workflow includes the following elements, all of which are extensible though configuration in Siebel Tools:
        - Customer_ID
        - Maximum number of program stages that are required to be returned (optional)
        - Event Code
        - Event Name
        - Event Category
        - An array consisting of Input Program Stages (stage IDs), the Program Type of each program associated with the stage, and the program priority of each stage
    - If no custom workflow exists, then the following parameters determine the programs to execute. If programs have identical priorities, then they are prioritized randomly.
        - Maximum number of Concurrent Programs for a Trigger
        - Program Priorities (in case of a tie)

3. For each of the program stages to be executed, the trigger service passes the CUSTOMER_ID to the program stage, then the program stage uses the CUSTOMER_ID to pass the correct context to the Oracle BI segmentation engine to execute the segments.

   The segmentation engine restricts each segment to this CUSTOMER_ID so that either 0 or 1 record is loaded into S_CAMP_CON.

   > **Note:** To accommodate the CUSTOMER_ID value, the Marketing Stage Execution workflow contains a CUSTOMER_ID input parameter, which is passed to the Load-Launch Campaigns step of the workflow. This calls the Marketing Campaign Load workflow, which contains a Get List Format System Data step that uses the BI Server to perform a WriteListFiles operation. This maps the CUSTOMER_ID to the value passed as input.

   The following figure illustrates trigger-based execution of marketing programs.



If the Execute Event Trigger Web service is called in batch mode (that is, if Real Time Flag is set to N), then all the records remain queued in the History table and are picked up when the number of records reaches the threshold specified in the Stage Allocation Threshold server parameter. All the customer Ids are then concatenated and sent to Oracle BI as a single, comma-separated Id and are then processed. For information about adding a trigger to a campaign, see *Adding Triggers to a Campaign Stage*.

> **Note:** Real Time Flag is a parameter for the stage threshold in the Marketing Event Trigger Execution Web service. You can change this value when calling this Web service. Real Time Flag is a case-sensitive parameter.

To enable throttling during a campaign load, a parameter called '"-Contact Profile".ROW_ID' stores the Customer Id value in the Get List Format System Data step of the Marketing Campaign Load workflow. You can enable throttling on other parameters by adding them to the same workflow step. You can also use the '"-Contact Profile".ROW_ID' parameter to enable throttling in the Marketing Create Lead and Marketing

Create Responses workflows. If you have modified the name of the Contact Profile variable in Oracle Business Intelligence, then be sure to modify the parameter name to match.

Adding Triggers to a Campaign Stage

This topic describes how to create a trigger and add the trigger to a campaign. For general information about using triggers, see *About Using Triggers with Campaign Stages*.

To create a trigger and add it to campaign

1. Navigate to the Administration- Marketing screen, then the Triggers view.
2. Click the New button to add a new trigger.
3. In the Trigger Details applet, add trigger details.

   The following table describes some of the fields in the Trigger Details applet.

Field	Comment
Trigger Code	A unique ID for the trigger.
Trigger Category	Available options are Churn, Cross Sell, Lifetime Event, Retention, and Upsell.
Trigger Description	Description of the trigger.
Associated Programs	Choose an associated program from the dialog box.
Trigger Status	(Required) Available options are Active or Disabled.
Created Date	(Required)

4. To add the trigger to a campaign, perform the following steps:

   a. Navigate to the Programs screen.
   b. In the Programs list, click the program name.
   c. From the Objects palette, select the Trigger object and move it to the workspace.
   d. In the Trigger Type dialog box, select a specific event trigger, or specify a repeating stage.

      Note: Double-clicking the Trigger object in the workspace navigates to the Program screen, Schedule, and then the Details view. Clicking the Event Trigger column opens a picklist to allow you to choose a different trigger.

   e. In the Program Flow workspace, select the Campaign, Lead, or Response object and associate it with the trigger.

Associating Segments with Campaigns

You previously defined segments with criteria in the Segment Designer. You can associate these segments with a campaign in the program.

The following procedure shows how to add segments to a campaign.

To add segments to a campaign

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. In the Program Flow workspace, select a Campaign object.

   If you do not yet have a Campaign object: Select an object from the Objects palette, move it to the workspace, and then select a campaign.
4. In the Objects palette, select a Segment object and move it to the workspace. If segments are already associated with the campaign, then they automatically appear in the workspace.
5. In the Previously Used Segments dialog box, perform one of the following steps:
   a. To create a new segment, click Choose a New Segment and select the location of the segment to use, and then click OK.
   b. Select a segment from the list and click OK.

      The segment object appears in the workspace.

Repeat Step 5 to add more segments to a campaign.

Note: When you include stand-alone segments (not part of a segment tree) in a stage, the members of the stand-alone segments are not deduplicated against other segments, trees, or lists in the stage.

Adding Imported or Internal Lists to Campaigns

Imported or internal lists of contacts can be added to the campaign. To check the status of an imported list, double-click the list icon in the Program Flow workspace to display the List Contacts and Prospects view.

The following procedure shows how to add a list to the campaign.

To add a list to the campaign

1. Navigate to the Programs screen.
2. In the Programs list, click the program name.
3. In the Program Flow workspace, select the Campaign object.
4. From the Objects palette, select the List object, and move it to the workspace.
5. In the Pick Campaign List dialog box, select an imported or internal list, and click OK.

   The List object appears in the workspace, linked to the stage and referencing the campaign.

To view and edit list details, double-click the List object in the workspace.

Adding Trees to Campaigns

Each campaign in your program can use one or more segment trees. After you associate a campaign with your program, you must allocate each segment tree within the campaign.

You can associate one or more segment trees with a campaign by using the following procedure.

To associate a segment tree with a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Design view tab, and then click the Segment Trees link.
4. In the middle list, click New.
5. In the Pick Segment Tree dialog box, click Choose a new Segment Tree.
6. In the second Pick Segment Tree dialog box, from the folders, select the Segment Tree.
7. In the Pick Segment Tree dialog boxes, click Save, and then OK to save the tree to the campaign.

> **Note:** You can also navigate to the Campaign screen, Design, then the Allocation view to associate a segment tree with a campaign. For information on allocating segments, segment trees, and lists, see *Allocating Segments, Segment Trees, and Lists to Offer Treatments*.

Adding Responses to Programs

Siebel Marketing includes a Responses shape in the Program Flow view. Right-clicking this shape and choosing Define Response navigates to the Program screen, Design, then Response Definition view, which contains all response definitions within the current program (for all stages). Deleting a response definition here also deletes the shape from the Program Flow designer view. For more information on response definitions, see *About Using Response Management*.

Right-clicking the Responses shape and choosing Generate Responses opens a dialog box that allows users to manually run the response generation process.

Use the following procedure to add a response to a program, using the Program Flow workspace.

To add a response to a program

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. Click the Design view tab.
4. In the Program Flow workspace, select a stage and add a Response object from the palette.
5. To complete response details, double-click the Response object in the workspace.
6. In the Response Definitions view tab, in the Details list, add or modify response details.

   For details about fields in the Response Definition applet, see *About Response Definitions*.
7. In the Response Values list applet, add a segment or segment tree.

About Inferred Responses

Response Definition functionality allows users to capture and persist *inferred* responses. An inferred response occurs when a customer does not respond in a concrete sense, but has changed his behavior in a specified manner over a specified time period. This differs from a *hard* response, where a customer explicitly accepts an offer through a conventional, direct channel, such as verbal acceptance of an offer by phone. Hard responses can also come through a conventional, indirect channel, such as clicking a link on a specific site.

Inferred responses are supported in the Response Definitions view. To see this view, navigate to the Program screen, Design, and then the Response Definitions view. A segment tree can define mutually exclusive inferences. For example, two response segments could be defined as:

- Customers who bought product X in the last 3 months.
- Customers who bought product Y in the last 3 months.

To prevent duplicate results, a segment tree can ensure that only one response record is created and only one follow-up action is taken.

Applying Funneling with Constrained Connectors

Siebel Marketing allows you to define a constrained connector to enable stage funneling, which allows a target audience to be maintained throughout the entire flow. Funneling can be used between stages or between stages with specified Wait times. Constrained connectors can start from a Stage or Wait shape and end on a Stage or Wait shape. Funneling from one stage to another implies that the audience in the second stage is a subset of the targeted audience from the first stage.

If a stage repeats, then funneling the second stage implies that the audience set is restricted to the targeted audience in Stage 1, up until the current time, including all completed executions of the previous stage.

Funneling cross-references the qualified target audience of the previous stage from the Campaign History Table (through appropriately configured list format filters while pulling a list for the next stage).

Note: Funneling is not supported if different target levels are used in Stage 1 and Stage 2 of a program.

To add a constrained connector to a program

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. Click the Design view tab.
4. In the Program Flow workspace, navigate to the Connector object in the palette and change the Constrained attribute to ON by selecting the button.
5. On a Stage or Wait shape, create a connector to another Stage or Wait shape.

   For information on creating connectors, see *Connecting Objects*.

Applying Lead Creation to a Program

Siebel Marketing contains a Lead Creation shape that allows a target audience or group of responders to be converted to leads. Right-clicking this shape and choosing Setup Leads navigates to the Program screen, Design, and then the

Lead Setup view, which defines all lead setup definitions within the current program. Deleting a lead definition here also deletes the shape from the Program Flow designer view. Right-clicking the Lead shape and choosing Generate Leads opens a dialog box that allows users to manually run the lead generation process. For more information on leads, see *About Creating and Using Leads*.

Use the following procedure to add lead creation to a program, using the Program Flow workspace.

To add lead creation to a program

1. Navigate to the Programs screen.
2. In the Programs list, click a program.
3. Click the Design view tab.
4. In the Program Flow workspace, select a stage and add a Leads object from the palette.
5. To complete Lead Setup details, right-click the Leads object and choose Setup Leads.
6. In the Lead Setup view tab, add or modify lead details, including segments or segment trees.

> **Note:** After adding a segment or segment tree, click the Update Count button.

The following table describes some of the fields in the Lead Setup applet.

Field	Comment
Stage Name	Name of the stage associated with the lead. Clicking this field navigates to the Program, Schedule, Details View, which displays the stage details, including the schedule.
Name	Name of the lead.
Referred By	The partner who referred the lead.
Source	A picklist displaying campaigns from the same program.
Product	The product that needs to be associated with the lead.
Folder Location	The default location of the lead list format. To change the default value of this field, change the value of the Default Lead List Format parameter. To locate the Default Lead List Format parameter, navigate to the Administration - Server Configuration screen, Enterprises, and then the Parameters view. For information on updating Siebel Enterprise parameter values, see *Siebel System Administration Guide* .

Field	Comment

The following table describes some of the fields in the Lead Values list applet.

Field	Comment
Name	Expandible hierarchy of segments and trees that define the lead. The hyperlink navigates to the Segment/Tree Definition in Oracle Business Intelligence.
Priority	Priority of the Tree Node.
Net Count	The most recent Net count retrieved from the segmentation engine.
Create Lead	A lead will only be created if this box is checked. It is checked by default.
Treatment	(Optional) A pick applet to associate a treatment with the lead. This field is used to track and report the effectiveness of treatments. Constrained to campaigns in the program.
Status	The default program status is Unqualified. Options are Accepted, Qualified, To be reassigned, Existing opportunity, Nurture, Converted, Rejected, and Retired.
Quality	A picklist from the lead object.
Description	Lead description.

Note: When batch converting contacts to leads in the Program Flow designer, campaign history information is not available.

Setting Up Waves for Campaign Loads

If your marketing program consists of a one-time campaign and treatment (and you are confident that your organization can handle the volume of responses), then you probably do not require multiple waves. Siebel Marketing provides a 100 % fully allocated wave (with a wave code of A and a time lag of 0) when a campaign is created.

If you are planning a multistage recurring campaign and anticipate a large distribution list of contacts to receive an offer, then you might want to take a measured approach to distribution and split fulfillment of the offer among a number of waves.

Waves, or set distribution periods, are commonly used to:

- **Test the campaign concept.** An initial sampling to gauge campaign response is followed by a larger distribution.
- **Examine the campaign mechanics.** A measured distribution of the campaign offer provides information to guarantee the campaign mechanism works efficiently from order entry, to fulfillment, to response tracking.
- **Balance the load on a fulfillment center.** In this case, each wave might include 10 to 15% of the list to make sure existing resources can reasonably handle launching a campaign, including managing campaign responses.

In addition to setting up waved distribution periods, you can set a lag time for additional waves that reference the stage launch date, and then split the generated list by a percentage of contacts for each wave period. You can also split by a List Measure. The measure must be included in the list to be available for use in splitting the list.

You can use the List Distribution list to specify the vendor export list format and distribution method for each wave. Before creating a second wave, decrease the number in the % field of the first wave, which, by default, is 100%. The total percentage of values cannot exceed 100.

The following procedure shows how to set up multiple waves for a campaign load.

To set up multiple waves for a campaign load

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click a campaign name.
3. Click the Design view tab.
4. From the link bar, click Wave Settings.
5. In the Waves list, create a new record.

   Use the following table, which describes fields in the Waves list, as a guide.

Field	Comment
Wave Code	Enter a wave code, up to 10 characters. You cannot save the record without a wave code. The wave code appears as part of the source code for the campaign member if you set up the source code format to include it. The wave code for the default wave is A.
Description	Describe the characteristics of the wave.
Lag	The default is 0. Enter the amount of time the wave is delayed after loading a campaign. The maximum lag for the waves cannot be greater than number of days between the start date and end date of the campaign. The wave is launched when the server processes the Launch Campaign request. This server process can be scheduled or can be manually started using the right-click menu in the Program Flow workspace.
Lag Unit	Choose either Hours or Days.

Field	Comment
%	The default percentage is 100 for a single wave. If you are planning multiple waves, then first reduce the percentage number in the first wave and enter the percentage of contacts who are included in the second wave. The total percent values cannot exceed 100%.

6. Complete the necessary fields and save the wave record.

Creating and Applying Program Templates

You can save any program you create as a reusable program template. The template retains many of the planning details from the program such as the program flow, related campaigns, activity plans, documents, and other details. After you create a program template, you can apply the template to new programs. You can also share the template with other employees in your organization.

Program templates also include child campaign templates for each of the campaigns in the design. For more information about campaign templates, see *Creating and Applying Campaign Templates*.

Saving a Program as a Program Template

The following procedure shows how to save a program as a program template.

To save a program as a program template

1. Navigate to the Programs screen.
2. In the Programs list, click a program to use as a template.
3. In the Program form, click the menu button, and choose Save As Template.

   This menu option is active only if your administrator has given you permission to use this action (using the Marketing access groups).
4. In the Save As Template dialog box, enter a name, and click OK.
5. To make changes to the new template, navigate to the Marketing Templates screen, then the Program Templates view.
6. Query for the template you created in Step 4.
7. In the template list or form, make the necessary changes.

Applying a Program Template to a Program

The following procedure shows how to apply a program template to a program.

To apply a program template to a program

1. Navigate to the Programs screen.
2. In the Programs list, either create a new program, or select the program name to which to apply the template.
3. In the Program form, click the menu button, and choose Apply Template.
4. In the Apply Template dialog box, select the template to apply, and click OK.
5. When asked if you want to continue, click OK.

   The Message dialog box, appears, confirming that the template was applied.

> **Note:** You cannot apply a program template if your program already has stages in the program flow. If your program has existing stages, then delete them from the program flow before applying the template.

6. In the Message dialog box, click OK.

Executing Programs

You can manually execute a program from the Program Flow link in the Design view. Alternatively, you can execute a program by scheduling a stage in the calendar. In the Schedule view, you use the calendar link to invoke the workflow process and execute the server tasks.

The following procedure shows how to execute a program using the Design view.

To execute a program using the Design view

1. Navigate to the Programs screen.
2. In the Programs list, click the program name.
3. In the Design view, click Program Flow.
4. In the Design view, right-click on the campaign.
5. Select Load Campaign.
6. In the Load Campaign Dialog Box, select the time and date, and click OK.
7. In the Design view, right-click on the campaign.
8. Select Launch Campaign.
9. In the Launch Wave dialog box, select the wave or waves to launch, and click OK.

5 Creating and Using Offers and Treatments

Creating and Using Offers and Treatments

This chapter describes how to create offers and treatments to present content on product and services to current and potential customers as part of a campaign. It includes the following topics:

- *About Creating and Using Offers and Treatments*
- *Process of Creating and Modifying Offers*
- *About Creating and Editing Treatment Templates*
- *Process of Creating and Editing Treatment Templates*
- *About Email Treatments*
- *Process of Working with Email Treatments*
- *About Using Personalization Categories When Editing Treatments*
- *About Creating Conditional Content in Treatments*
- *Previewing Treatments*
- *About Fax Treatments*
- *Process of Working with Fax Treatments*
- *Web Treatments*
- *Creating Other Treatment Types*
- *Associating Literature with Treatments*
- *Implementing Test and Control Groups for Treatments*

About Creating and Using Offers and Treatments

An offer is a single proposition or message to a customer that provides an incentive to respond. Offers are associated with a campaign, and then presented to contacts and prospects when the campaign is launched. Offers can be reused in many campaigns, but the campaign is a one-time instance of the offer presented to a customer at a certain point in time.

A single offer can have multiple treatments, with each treatment delivering the offer by means of a specific channel and campaign. A treatment is a channel-specific instance of an offer. You create a treatment for every channel, such as email or direct mail, through which you want to deliver the offer.

Offers associated with campaigns are created using the Offers screen. Typically each campaign has a single offer, but you can associate multiple treatments with that offer. For example, a single campaign can have an associated offer that has email and Web treatments.

Using the Offers views and Treatments views, you can create, edit, and preview reusable offers with multiple channel-specific treatments, which can be associated with your campaigns.

In addition, you can design personalized HTML and text templates for email treatments. You can create email treatments containing conditional content that is based on contact and prospect attributes. Additionally, email

treatments can contain embedded links to items such as Web treatments and Web surveys, so the marketer can assess and capture campaign responses. Web treatments can contain embedded links to Web surveys, events, trackable URLs, downloads, and response forms.

Process of Creating and Modifying Offers

To create and modify offers, perform the following tasks:

- *Creating and Modifying Offers*
- *Adding Treatments to Offers*
- *Associating Products with Treatments*

This process is a step in *Roadmap for Setting Up Campaigns*.

Creating and Modifying Offers

You can create reusable offers in the Offers screen, adding details such as the channel to use, activation and expiration dates, templates, literature, and so on. For more information about using offer templates to create an offer, see *Creating Treatment Templates and Adding to the Template List*.

Use the Offers link bar to navigate directly to a treatment type. The types of treatments that are available to you depend on the features your company is licensed to use. After you create or modify an offer, you can create and add treatments to the offer, and associate products with the offer.

This task is a step in *Process of Creating and Modifying Offers*.

You can use the following procedure to create and modify offers.

To create or modify an offer

1. Navigate to the Offers screen.
2. In the All Offers list, create a record, or select an offer to change.
3. Complete the fields.

   The following table describes some of the All Offers list fields.

Fields	Comment
Offer Code	Contains a unique code that identifies the offer. You can change this code, but make sure the new value is unique.
Type	Designates the purpose of the offer. For example, Cross-Sell, Retention, or Up-Sell.
Activation Date	Identifies the date that the offer becomes active. You can associate an inactive offer with a campaign, but when you launch the campaign, only active offers are executed.
Expiration Date	Use the calendar controls to select the offer's expiration date.

Fields	Comment
	Expired offers must not be associated with campaigns because they are not sent out when the campaign is launched.
Organization	The organizations that have visibility to associate to see this offer in their campaign design views.
Approval Status	Indicates whether the offer has been submitted, approved, or declined.
Approval History	Shows the approval history of the offer.
Products	Use to indicate which products are being promoted by this offer.
Price List	Used to associate a previously defined price list with this offer. A marketer can create promotional prices for specific products. When an offer recipient clicks a product item hyperlink in an email or Web treatment and goes to the product detail Web page, the recipient sees the predefined promotional price. The set of products associated with the selected price list can be different from the set of products defined in the offer's product list. When a contact responds to a treatment, clicks a product link, and goes to the product detail page, the contact sees the promotional price that is defined for that product only if that product is a part of the price list that was selected for this offer. Otherwise, the contact gets the default price for the product.
Promotion	Use to associate the offer with a promotion from the Order Management application (from the product catalog), such as a special price discount or product bundle.
Loyalty Promotion	Shows the Loyalty promotion associated with this offer. The offer is used to advertise this loyalty promotion. When a customer transacts accordingly, the promotion can award loyalty points.

Adding Treatments to Offers

You can use the following procedure to create treatments and add them to offers. After creating a treatment you can associate a treatment template with it.

This task is a step in *Process of Creating and Modifying Offers*.

To create a treatment

1. Navigate to the Offers screen.
2. In the link bar, select the Treatment channel you want to add.
3. Complete the fields in the Treatment Details screen, using the values in the following table as a guide.

Fields	Comment
Treatment Code	Contains a unique code that identifies the treatment. You can change this code, but make sure the new value is unique.
Channel	Identifies the channel used to distribute the treatment. For example, Email, or Fax.
Parent Offer	Choose the offer with which to associate the treatment.
Cost	Cost of the treatment.
Type	Designates the purpose of the offer. For example, Cross-Sell, Retention, or Up-Sell.
Activation Date	Identifies the date that the treatment becomes active. You can associate an inactive treatment with a campaign, but when you launch the campaign, only active treatments are executed.
Expiration Date	Use the calendar controls to select the treatment's expiration date. Expired treatments must not be associated with campaigns because they are not sent out when the campaign is launched.
Subject Text	Email Treatment only. Enter the subject text of the email.
Description	Enter a description of the treatment.
Organization	Use to associate the organization that has visibility to see this treatment in its campaign design views.
Approval Status	Indicates if the treatment has been submitted, approved, or declined.
Approval History	Shows the approval history of the treatment.
Products	Use to indicate which products are being promoted by this treatment.

Fields	Comment
Subscription List	Use to select a marketing list of type Subscription List and associate this list with this treatment. The subscription list can already have contacts or prospects or be empty.
Language	For email treatments, do not change the value in this field.
Version	Use this field if you create multiple versions of the same treatment in the same channel. You can enter any numeric value.
Locale	Used to locate the correct, language-specific Web page.
Email Marketing Server	Used for email treatments and Web treatments only. Use to select the Email Marketing Server when sending an Email treatment. This server provides the following: o From and Reply-To header values. o Connection details for the email sending daemon. o SMTP envelope Sender address domain (for bounces). o Base URL to use in constructing response forms and trackable URLs. Trackable URLs track customer clicks on an embedded link in an email. o Web Server base URL (for product catalog items, Web offers, Web surveys, some response forms, and events).
Delivery Profile	Used when sending fax treatments. This field is only available in the fax treatments view, not in fax treatment records in the All Treatments view. Profiles are created using the Communications Administration screen's Communications Drivers and Profiles view. For more information, see *Creating Delivery Profiles and Associating with Fax Treatments*.

Associating Products with Treatments

You can associate predefined products with a treatment. Ideally, you only select a subset of products from the price list associated with an offer, because there is a many-to-one relationship between the products and the price list. The products that you associate with the offer determine which product catalog page links can be embedded in Email and Web treatments.

This task is a step in *Process of Creating and Modifying Offers*.

The following procedure shows how to associate a product with a treatment.

To associate a product with a treatment

1. Navigate to the Offers screen.
2. In the All Treatments list, select the treatment and click the Products select button.

3. In the Products dialog box, in the Available list, select one or more products, and then click Add to copy them to the Selected list.
4. Click OK.

About Creating and Editing Treatment Templates

To create an Email treatment or Web treatment, you must start with a treatment template. A template can be empty or can include text and other elements. Treatment templates are available in Siebel Marketing, Siebel Web Marketing, and Siebel Campaigns. You can create the document that serves as a template using any HTML tool or text editor such as Adobe GoLive, Macromedia Dreamweaver, Microsoft Front Page, or Windows Notepad. After creating the source document you upload it to the Treatment Templates list.

After creating a template, you add the template file to the template list and associate the template with a treatment. When you associate a template with a treatment, Siebel Marketing creates a copy of the template, leaving the master unaffected. This copy has the same name as the original and adds a time stamp to provide a history.

Treatment templates can be associated with the following treatment types:

- **Fax treatments.** For more information on Fax treatments, see *Associating Templates with Fax Treatments*.
- **Email treatments.** When creating an email treatment, you can use the Edit Email view tab to associate a template with the treatment.
- **Web treatments.** When creating a Web treatment, you can use the Edit Web Treatment view tab to associate a template with the treatment.

Process of Creating and Editing Treatment Templates

To create and edit treatment templates, complete the following tasks:

- *Creating Treatment Templates and Adding to the Template List*
- *Using Merge Fields in Email Treatments*

Related Topics

About Using Hyperlinks (HREF) in Treatment Templates

About Using Personalization Categories When Editing Treatments

About the Merge Fields Personalization Category

Creating Treatment Templates and Adding to the Template List

Treatment templates are usually created with a file type of text (TXT) or HTML (HTM or HTML). You create the template, and modify existing templates, using third-party HTML tools and text editors, such as Microsoft Front Page and Windows Notepad.

After creating the template using a third-party tool, you must add the new template to the Treatment Templates list so that you can associate it with a treatment.

Creating an HTML or Text Treatment Template

The following procedure shows how to create an HTML or text treatment template.

To create an HTML or text treatment template

1. Create an HTML template, using a third-party HTML editor or text editor of your choice:
   a. Using Microsoft Word, Front Page, Notepad, or another editor, create a new file.
   b. For HTML templates, save the file using an HTM file extension.

      CAUTION: Take care when using quotation marks in personalization elements. Some applications replace straight quotation marks (") with curly (also called smart) quotation marks (“”). Curly quotation marks cause errors when used in personalization elements.

2. If it does not already exist, then create a subdirectory in your HTML templates directory and name it Images.

   The HTML templates directory is the directory specified for the editor file manager browser on the external Web server. For additional information about the editor file manager, see *Siebel Marketing Installation and Administration Guide* . In the Images directory, you store the graphics to be used in the treatment. Make sure that you refer to each image as follows:

   ```
   <IMG BORDER=0 SRC="http://server_name/Web Marketing/images/image.gif">
   ```

   where:

   - *server_name* is the name of the server where the file manager is located on the external Web application server
   - *image.gif* is the name of the embedded image

   Note: You cannot use HTML or embedded images in text email. However, some email readers display images that the sender attached to a text email at the end of the text email.

3. Add the template you created to the Treatment Templates list as follows:
   a. Navigate to the Offers screen.
   b. In the link bar, click Treatment Templates.
   c. In the Treatment Template list, create a record.
   d. Complete the fields to add the treatment template to the list:
      - In the Name field, enter a name for the template.
      - Click the File Name select button and select the template file.
4. Copy the images you embedded in your treatment to the subdirectory you created or the image folder you referenced in Step 2.

Modifying An Existing Treatment Template

If you want to modify an existing treatment template, then perform the steps in the following procedure.

To modify an existing treatment template

1. Make the necessary modifications to the template file saved on your local drive, using the same text editor used to create the file.
2. Save and close the file.

3. Navigate to the Offers screen, then the Treatment Templates view.
4. In the Treatment Template list, select the template record.
5. In the File Name field, click the select button.
6. In the dialog box, click Browse.
7. Select the file, and click Open.

About Using Hyperlinks (HREF) in Treatment Templates

Siebel Marketing can perform a special processing task for HTML-based emails and Web treatments. A URL address entered directly into the body of an HTML template, such as http://www.mycompanyname.example.com, is not recognized as a hyperlink by the HTML parser. The generic HTML syntax for a hyperlink is:

```
<a href="target url">highlighted text or picture</a>
```

The link includes both the URL and the anchor, which is the text or image that appears in the template and links to the URL. Thus, to create a link to the URL http://www.mycompanyname.example.com and display the Web site as the text in the message, you must enter the following:

```
<a href="http://www.mycompanyname.example.com">MyCompanyName Web Site</a>
```

Using this method, Web treatments, response forms, and product items are replaced differently in HTML templates from the way they are replaced in text templates. The following list describes the default method for processing hyperlinks:

- For Web treatments, Web surveys, and product links, Siebel Marketing creates the hyperlink so that the hyperlinked text is the Web treatment name, Web survey name, or product name such as in the following reference:

```
<a href="[Web Treatment: 10% discount offer]">10% discount offer</a>
```

For more information, see *About Using Personalization Categories When Editing Treatments*.

- For response forms, Siebel Marketing creates the hyperlink so that the hyperlinked text is the same as the response forms description in the Response Types view. The hyperlinked text for a response form can be modified in the Response Types view, where, for each response form, a description field represents the value used for highlighted text.

These default methods for processing hyperlinks in Siebel Marketing can be modified. You can put an asterisk (*) before the tag to tell the application that you are manually defining the hyperlink format in the HTML body. The asterisk tells the application not to create the hyperlink.

For example, instead of inserting [Web Treatment: Great Discount], the marketing manager can enter the following:

```
<a href="[*Web Treatment: Great Discount]">Whatever I want to highlight be it text
or picture</a>
```

In this case, Siebel Marketing replaces the Web treatment with the proper URL but does not create the HREF syntax. You can then create a Web treatment link, product item link, and response form link with any text or picture you want.

Note: You can customize the text shown in a hyperlink by right-clicking the link in the HTML Editor and choosing Edit Link.

About Email Treatments

Using the Email Treatments view, a marketer can design and distribute a personalized email treatment to target recipients of a campaign. An email treatment can be associated with a price list for various products. If the recipient clicks on a product link in an email treatment, then the product detail page displays the promotional price for that product rather than the list price.

The Email Treatments view includes the Treatment Details, Edit Email, Delivery Profile, Attachments, and Advanced tabs.

- **Treatment Details.** This form contains additional fields that you can use if the email treatment requires approvals from your company's marketing and legal departments. It provides a unique identifier for the treatment in the Treatment Code field. Use this form to specify the email treatment's Subject Text, the Email Marketing Server (Reply-To and From headers, Email Marketing Daemon configurations, and Web Server URLs) to be used to distribute the treatment, and Personalization Format to use with this treatment.
- **Edit Email.** Use this form to edit the template content and to select personalization items such as Trackable URLs, Social Sharing URLs, Dynamic URLs, Response Forms, and Merge Fields. Personalization elements can be inserted into the template in the HTML Editor.
- **Delivery Profile.** This read-only list provides a list of the Email Marketing Server parameters for the Email Marketing Server that is associated with the treatment.
- **Attachments.** Includes literature items with your email treatment. These items are delivered as attachments to the email when the campaign is launched.
- **Follow up Activity.** Allows marketers to schedule a follow-up activity when the treatment is delivered.
- **Advanced.** Contains the Related Web Treatments, Related Web Surveys, Related Events, Social Sharing URLs, Dynamic URLs, and Trackable URLs lists. Use these lists to specify the Web treatments, Web surveys, events, and URLs that you plan to include as hyperlinks in the email treatment. Adding these elements embeds them as Personalization Elements. For information on Web surveys, see *About Web Surveys and Landing Sites*.

  Whenever a treatment recipient clicks a Web treatment, product catalog item, or trackable URL link in an email treatment, the click is captured as a response. The available response types are Clicked On Web Treatment, Clicked On Web Survey, Clicked On Product URL, and Clicked on URL.

Note: Siebel Events views are not currently included in the Siebel Web Marketing application. Therefore, if you embed a related event in an email treatment, related events must be directed to the Web Server on which Siebel Events is installed. To accomplish this, the Web Server field must contain the location of the Web Marketing Web Server and the location of the Events server. For more information see the Web Server field description in *Adding Treatments to Offers*.

Process of Working with Email Treatments

This topic lists the tasks you generally perform when setting up email treatments for an offer.

To set up email treatments, perform the following tasks:

- *Creating Email Treatments*

- *Associating Templates with Email Treatments*
- *Editing Treatments*
- *Adding Attachments to Email Treatments*
- *Adding Response Forms to Email Treatments*
- *Adding Social Sharing URLs to Email Treatments*
- *Adding Dynamic URLs to Email Treatments*
- *Creating Activities for Contacts and Prospects for Email Treatments*

Alternatively, you can use the Design Email Treatment task in the Task UI application to create an email treatment. See *Using the Task UI Application to Create and Update an Email Treatment*.

Related Topics

About Using Personalization Categories When Editing Treatments

Previewing Treatments

Creating Email Treatments

Siebel Marketing has multiple forms of email treatments available for use in campaigns. The following topics cover these treatments:

- *Creating an Email Treatment*
- *Creating Email Confirmation Treatments*
- *Creating Email Welcome Treatments*
- *Including Forward to a Friend in Your Email Treatments*
- *Creating a Text Email from an HTML Template*
- *Using the Task UI Application to Create and Update an Email Treatment*

This task is a step in *Process of Working with Email Treatments*.

Creating an Email Treatment

The following procedure shows how to create an email treatment.

To create an email treatment

1. Navigate to the Offers screen.
2. Click Email Treatments.
3. In the Email Treatments list, create a new record.
4. Complete the fields, using the field descriptions in *Adding Treatments to Offers* as a guide.

Email treatments have their own specific channel types available. *Creating an Email Treatment* describes these email-specific channels. You must always create a treatment using the Email channel. Use the other channels when implementing a double-opt in or subscription confirmation process. When you create treatments using these other channels, they must be associated with the same campaign as the original Email channel treatment.

Channel Types for Email Treatments

Email Channel	Description
Email	The Email channel is for standard email treatments that do not use a subscription list.
Email-Confirm In	The Email-Confirm In channel produces a confirmation opt-in treatment that is delivered to users. The confirm-in treatment is triggered by a user responding to the Confirm Subscribe to List response form. When this response form is clicked, this confirmation is delivered to the user with an additional link asking to confirm opt-in status to the email program. For more information, see *Creating Email Confirmation Treatments*.
Email-Confirm Out	The Email-Confirm Out channel produces a confirmation opt-out treatment that is delivered to users. The confirm-out treatment is triggered by a user responding to the Confirm Unsubscribe List response form. When this response form is clicked, this confirmation is delivered to the user with an additional link asking to confirm opt-out status to the email program. For more information, see *Creating Email Confirmation Treatments*.
Email-Welcome	The Email-Welcome channel produces a standard welcome message to the email program. This message is triggered by a user recording a subscription record in the database. This message is triggered by a user responding to the Subscribe to List response form. This message does not ask for confirmation, thus it is not a replacement for the Email-Confirm In channel. Use the Welcome channel when you do not want to have a double opt-in method as is used by the Email-Confirm In channel. For more information, see *Creating Email Welcome Treatments*.

Creating Email Confirmation Treatments

Email confirmation treatments are used to respond to customers who have clicked on a Confirm Subscribe to List response form or a Confirm Unsubscribe to List response form in a previous message. These treatments are sometimes called double opt in or double opt out treatments because from the recipients' point of view they must take two actions to opt in or out. The first act is to click on a response form in an initial email, the second is to respond to the confirmation email. If you do not require your customers to go through two steps to opt in, then you can send an Email-Welcome treatment instead of an Email-Confirm In treatment. For more information, see *Creating Email Welcome Treatments*.

Siebel Marketing sends out an Email-Confirm In or an Email-Confirm Out message to only those contacts who have clicked those response forms. If your list includes contacts for whom there is no record of the Confirm Subscribe to List or Confirm Unsubscribe to List events, then Siebel Marketing skips over them and does not send a confirmation treatment.

The following procedure shows how to create an email confirmation treatment.

To create an email confirmation treatment

1. Navigate to the Offers screen, then the Email Treatments view.
2. Create a new email treatment.
3. Set the Channel field to either Email-Confirm In or Email-Confirm Out.
4. Associate the Parent Offer with the treatment.
5. Associate a subscription list with the treatment.
6. In the edit email view, associate a treatment template with the treatment.
7. In the edit email view, include a response form for Subscribe to List within the body of the message.
8. Save the treatment.
9. Navigate to the Campaigns view.

10. Associate the treatment with the appropriate email confirmation campaign.

Creating Email Welcome Treatments

If you do not require your customers to use a double opt-in confirmation to accept the offer, then after the customer has clicked on the Subscribe to List response form, you typically follow up with an Email-Welcome treatment. Siebel Marketing sends out an Email-Welcome message to only those contacts who have clicked the Subscribe to List response form. If your list includes contacts for whom there is no record of the Confirm Subscribe to List event, then Siebel Marketing skips over them and does not send the Email-Welcome treatment.

The following procedure shows how to create a welcome message.

To create a welcome message

1. Navigate to the Offers screen, then the Email Treatments view.
2. Create a new email treatment.
3. Set the Channel field to Email-Welcome.
4. Associate the Parent Offer with the treatment.
5. (Optional) Associate a subscription list with the treatment.
6. In the edit email view, associate a treatment template with the treatment.
7. Save the treatment.
8. Navigate to the Campaigns view.
9. Associate the treatment with the appropriate email confirmation campaign.

Including Forward to a Friend in Your Email Treatments

Siebel Email Marketing can include a Forward to a Friend link in email treatments. This provides a means for your contacts and prospects to forward a version of the message to others and optionally to add a personalized note as well.

The following procedure shows how to include Forward to A Friend in a treatment.

To include Forward to A Friend in a treatment

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Treatments list, click an email treatment.
3. In the edit email view, select a template to edit.
4. In the HTML editor view, from the Categories menu on the toolbar, select Response Forms.
5. In the Items menu on the toolbar, choose [Response: Forward to Friend].
6. Click the location in the template where you want to insert the Forward to Friend link.
7. Click the Insert button (the down arrow icon) on the toolbar.

Creating a Text Email from an HTML Template

You can create a text version of your HTML treatments. By creating the text version, you can streamline your production efforts. This creates a text template from the HTML template. You might have to adjust the formatting before delivery.

The following procedure shows how to create a text version of your HTML treatments.

To create a text email from an HTML template

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Treatments list, click an email treatment.
3. In the list between the Treatments list and the Editor, create an additional template for the treatment.
4. In the Template Name field, choose a text treatment template and click OK.
5. Return to the HTML template within the treatment.
6. Click Save Text Template.

7. To view the results, select the text template in the list preceding the Editor.

   The text content appears in the Editor.

Associating Templates with Email Treatments

You can associate a template with an email treatment by using the following procedure. To edit the treatment template, see *About Creating and Editing Treatment Templates*.

This task is a step in *Process of Working with Email Treatments*.

To associate a treatment template with an email treatment

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Email Treatments list, select the treatment.
3. In the Edit Email tab, create a new record.
4. In the Edit Email list, complete the necessary fields.
   a. Siebel Marketing populates the Sequence field. Change the sequence if you are adding multiple templates with rich and plain format. The sequence field includes email attachments. Therefore, when you add your first template, you might get a sequence number other than 1.

      For example, if you have two templates (one HTML and one text) associated with the email treatment, then adjust the sequence so that you associate the plain format (text) first and the rich format (HTML) last. This change satisfies the Multipart MIME standard. The Multipart MIME standard defines a way to send both the text and HTML content together within the body of a single email message. The email program displays only the part that it has been configured to display.
   b. In the Template Name field, click the select button.

      You can associate one text template and one HTML template with the treatment.
   c. In the Pick Treatment Template dialog box, select the template record, and click OK.
5. Save the record to associate the template with the treatment.

Editing Treatments

After you add a template to a treatment, you can edit it in the following ways:

- **Edit a template in the edit treatment screen.** Make changes to your treatment using the text editor or the TinyMCE HTML editor provided with Siebel Marketing. In the Edit Email view, select a template to modify. The template appears for editing at the end of the page.

  If you created your template as an HTML file, then you can use the HTML editor to render the HTML source (tags and text) and to modify the rendered HTML. If you created your template as a text file, then a text editor displays the treatment contents for editing. Preview the email to verify the treatment's syntax, including merge fields and embedded objects.
- **Modify a template using a third-party HTML editor.** If you have to make edits that are not possible in the HTML editor provided with Siebel Marketing, then you can modify the template using a third-party HTML editor. Examples of third-party editors are Adobe GoLive and Macromedia Dreamweaver. For more information, see *Editing a Template Using a Third-party Default HTML Editor*.

This task is a step in *Process of Working with Email Treatments*.

Editing Email Treatments

The following procedure describes how to edit an email treatment.

To edit an email treatment

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Email Treatments list, select an email treatment.
3. In the Edit Email tab, select a template to change.

   One of the following editors starts:

   - **Text editor.** You use this tool to make simple changes to the text. The text editor starts by default, if the selected template is a text (.txt) file.
   - **HTML Editor.** You can use this tool to make more complex changes than you can make in a text editor. The TinyMCE HTML editor starts by default if the selected template is an HTML file (HTM or HTML file extension). For more detail, see *Using the Siebel Marketing TinyMCE HTML Editor*.
4. To embed a personalization item such as a Response Form or Trackable URL, perform the following steps:
   a. Locate the position in the treatment text where the personalization item is to appear.
   b. In the Categories drop-down menu, choose one of the available personalization categories, for example, Events, Merge Fields, or Social URLs.

      The available elements for the selected category appear in the personalization Items menu. For more information about personalization categories, see *About Using Personalization Categories When Editing Treatments*.
   c. In the Items menu, choose a personalization item and click the Insert button.
5. When you finish making changes, click Save Template.
6. Repeat Step 3 through Step 5 to continue editing the template.
7. To preview your changes and verify that the template still performs correctly, click the Verify & Preview button.

   If your administrator has configured the Email Marketing Server to integrate with Apache SpamAssassin, then clicking the Verify & Preview button also generates spam scores for the email. A spam score for an email indicates the likelihood of the email being classified as spam and being rejected by a recipient's spam filters.

   If the email generates a high spam score, modify the email content until it passes the spam scoring test. For additional information, see *Siebel Marketing Installation and Administration Guide* .

Using the Siebel Marketing TinyMCE HTML Editor

You can use TinyMCE, the HTML editor provided with Siebel Marketing, to make changes to your HTML template. To make more complex changes in TinyMCE, see *Editing a Template Using a Third-party Default HTML Editor*.

TinyMCE supports the following features:

- Alignment options: Align to the inside margin on the page, the center, and, or, align to the outside margin on the page.
- Alt-tag support
- Bold, italic, and underline
- Bulleted List
- Clip art support

- Copy, cut, and paste
- Fonts (typeface, size, style)
- Find and replace
- HTML source view
- Hyperlinks
- If-Then-Else conditional statements
- Indents
- Numbered Lists
- Personalization support (events, merge fields, response forms, Web surveys, Web treatments, trackable URLs, social sharing URLs, dynamic URLs, product catalog items)
- Preview support
- Styles
- Tables
- Undo and redo

To make changes using the HTML editor, enter your changes directly in the workspace. You can also use the editing toolbar in the Template Contents workspace for formatting text. Most of the buttons on the toolbar are the same buttons that appear in the standard TinyMCE software.

Adding Graphics to HTML Email Treatments

The following procedure describes how to add a new graphic to an email treatment using the HTML editor.

To add a graphic to an HTML email treatment

1. Navigate to the Offers screen, and from the link bar select Email Treatments.
2. In the Email Treatments list, select a treatment, and click the Edit Email tab.
3. In the HTML editor workspace, place your cursor at the location where you want to insert the graphic.
4. On the HTML editor toolbar, click the Image icon.
5. In the dialog box, do one of the following:
    - Enter the URL of the image and click OK.
    - Browse for an image on the local server by clicking the Browse Server button.
6. Adjust the picture dimensions if necessary, and then click OK. The image is inserted in the HTML editor.
7. Click the Save Template button.

Editing a Template Using a Third-party Default HTML Editor

If you prefer to use a third-party HTML editor over the TinyMCE HTML editor provided with Siebel Marketing, then you can do so using the following procedure.

To edit a template file using your default HTML editor

1. Navigate to the Offers screen and, from the link bar, select the type of treatment.
2. In the Treatments list, select a treatment, and click the Edit Email or Edit Web Treatment tab.
3. For email treatments, select the HTML template in the list between the Treatments form and the Editor.
4. In the HTML Editor toolbar, click the Source icon.
5. Copy all the text in the workspace to your third-party HTML editor.
6. In the third-party HTML editor, make changes to the template.

7. Paste the changed template source text back into the HTML editor.
8. In the Edit Email list, associate the HTML file with a treatment.

Adding Attachments to Email Treatments

Use the following procedure to add literature items as email treatment attachments. Be aware that some Internet Service Providers limit the size of emails and email attachments that they deliver to their subscribers.

This task is a step in *Process of Working with Email Treatments*.

To add an attachment

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Email Treatments list, click the treatment name.
3. Click the Attachments view tab.
4. In the Attachments list, create a new record.
5. Click the Name select button, select a literature file to attach, and click OK.
6. In the Attachment Label field, enter an attachment label for each file.

Adding Response Forms to Email Treatments

You can include a variety of response forms in an email treatment. Whenever a customer receives the email treatment and clicks on the hyperlink for a response form, responses are created for the campaign.

Response types are fields in a response record. A response record might be generated by the email recipient clicking the response form link or by completing a form on the Web page to which he or she has been directed.

This task is a step in *Process of Working with Email Treatments*.

The following procedure shows how to add a response form to an email treatment.

To add a response form to an email treatment

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Email Treatments list, click an email treatment name.
3. Click the Edit Email view tab.
4. Click a template to edit.

   The template appears in the workspace.
5. From the Categories (HTML editor) or the Personalization Categories (text editor) menu, choose Response Forms. Use the following table as a guide.

Response Form	Description
Confirm Subscribe To List	Use this in an initial email treatment to activate a double opt-in process. When the recipient clicks the embedded link, Siebel Marketing sends an email confirm-in treatment with a Subscribe to List response form.

Response Form	Description
Confirm Unsubscribe from List	Use this in an initial email treatment to activate a double opt-out process. When the recipient clicks the embedded link, Siebel Marketing sends an email confirm-out treatment with an Unsubscribe to List response form.
Forward to Friend	Navigates customers to a page where they can add the email address of friends and from where your company can forward the message. Customers can also provide a text message to be sent with the email treatment. When they submit this form, Siebel Marketing generates a Forward to Friend response type record and sends a copy of the email to any email addresses that the customer provided. It then regenerates the response form links in the email for the new recipient's email address.
One Click Unsub	Sets the Do Not Email check box on the contact profile and displays a confirmation message to the customer that states that she has been unsubscribed from all email treatments.
Read Receipt	Detects that the email message has been opened by the customer. The customer is not aware of this hidden event. This link is used only in HTML to embed a 1x1 pixel image in the email treatment at the location where a response form is placed. If the recipient of the email treatment opens the email, then Siebel Marketing retrieves this image from the Email Marketing Server and updates the Message Open Timestamp in the campaign history table (S_CAMP_CON). The following are some ways a read receipt can be blocked: o Newer email applications have preferences options that can prevent the display of embedded images. o Ports used to make the request for the image might be blocked at the recipient's firewall. o If you place the read receipt image in the HTML part of a multipart MIME email message and the recipient sets up his email application to read text emails only, then the Read Receipt image request does not occur. o For the Read Receipt to work correctly, it must be on its own line at the end of the message.
Requested call back	Navigates customers to a Web page where they can provide contact information and from where your company can arrange a follow-up phone call.
Requested More Info	Navigates customers to a Web page where they can provide contact information and from where your company can send more information such as brochures or other collateral.
Requested Unsubscribe	Navigates customers to a Web page where they can enter communication preferences by channel. For more information, see *Setting Up and Using Web Marketing*
Subscribe to List	Navigates customers to a Web page where a confirmation message displays stating that they have been subscribed to the list. This response associates the contact or prospect ID of the respondent with a subscription list associated with the treatment.

Response Form	Description
Unsubscribe from List	Navigates customers to a Web page where a confirmation message states that the customer has been unsubscribed. Siebel Marketing generates an Unsubscribe from List response type record and removes the customer's contact or prospect record from the subscription list associated with the treatment.

6. In the Items menu (HTML editor) or the Personalization Elements menu (text editor), choose a response type.
7. Position the cursor at the desired location in the content, and click Insert.
8. When you are finished editing, click Save Template.

Adding Social Sharing URLs to Email Treatments

When editing email treatments, you can use the Social Sharing URLs functionality to define a hyperlink and associate it with one or more social network icons, for example, Facebook© or Twitter© icons, which are added to the email treatment. Customers who are targeted for the email campaign can then click the relevant icon directly from the email offer to share the hyperlink on their social networks.

To make a social sharing URL available in TinyMCE for inclusion in email treatments, you must first define the social sharing URL. The following procedure describes how to create a social sharing URL and then add the URL to an email treatment. For information on configuring the social networking sites that are available for selection in TinyMCE when using social sharing URLs, see Siebel Marketing Installation and Administration Guide.

This task is a step in *Process of Working with Email Treatments*.

To create a social sharing URL and add it to an email treatment

1. Create the social sharing URLs that you want to make available for selection in TinyMCE as follows:
   a. Navigate to the Offers screen, then the Email Treatments view.
   b. In the Email Treatments list, click the treatment name.
   c. Click the Advanced view tab, then click the Social Sharing URLs link bar.
   d. Create a new record, entering values similar to those shown in the following table, then save the record.

Parameter	Value
Name	Enter the name you want to assign the social sharing URL. This name is displayed in the Items menu in the email treatment editor.
URL	Enter the URL that you want to allow customers to share on their social networks.

2. Insert the social sharing URL you have created into an email treatment template as follows:
   a. Click the Edit Email view tab.
   b. Select a template to edit.

The template appears in the workspace.

c. From the Categories menu in TinyMCE, choose Social URLs.

d. From the Items menu, select the social sharing URL you created, then click the Insert arrow.

The Social Sharing dialog box is displayed.

e. In the Social Sharing dialog box, specify values similar to those shown in the following table.

Parameter	Value
Title	Enter the text that is displayed for the hyperlink when it is displayed on customers' social networks.
URL	The social sharing URL is displayed allowing you to modify it, if required.

f. Select the social communities on which you want to allow recipients of the email treatment to share the hyperlink by clicking the appropriate check boxes, then clicking OK.

The social community icons are embedded in the email treatment.

Adding Dynamic URLs to Email Treatments

When creating email treatments, you can use the Dynamic URLs functionality to embed dynamic hyperlinks into an email template. When emails are generated for the treatment, the Email Marketing Server retrieves the content indicated by the dynamic URL and the content is merged into the email.

Note: To use the Dynamic URLs functionality, you must install Email Marketing Server build 8.1.1.2 [610] - EMS[624] or later from My Oracle Support.

To make a dynamic URL available in TinyMCE for inclusion in email treatments, you must first define the dynamic URL, then add it to an email treatment as described in the following procedure.

This task is a step in *Process of Working with Email Treatments*.

To create a dynamic URL and add it to an email treatment

1. Create the dynamic URL that you want to make available for selection in TinyMCE as described in Step 1 in *Adding Social Sharing URLs to Email Treatments*, but click the Dynamic URLs link bar at Step c.
2. Enter values similar to those shown in the following table, then save the record.

Parameter	Value
Name	Enter the name you want to assign the dynamic URL. This name is displayed in the Items menu in the email treatment editor.
URL	Enter the URL that you want to embed in the email treatment template.

Parameter	Value
	Dynamic URLs can contain merge fields and can be defined to specify the content management system that is the source of content for a given contact or prospect. For example, the following dynamic URL contains 2 merge fields, [Field: First Name] and [Field: Last Name]: `http://server_name.example.com:8080/getOffer.php?firstName=[Field: First Name]&lastName=[Field: Last Name]`

3. Insert the dynamic URL you have created into an email treatment template, as described in Step 2 *Adding Social Sharing URLs to Email Treatments*, but select Dynamic URLs from the Categories menu at Step c.
4. From the Items menu, select the dynamic URL you created, then click the Insert arrow.
   The dynamic URL is embedded in the email template.
   If you defined a dynamic URL that contains merge fields, as shown in the example in Step 2, then when the email is generated for a contact named JaBrown, the URL is converted, and offer content appropriate to Jane Brown is merged into the email as follows:
   `http://server_name.example.com:8080/getOffer.php?firstName=Jane&lastName=Brown`

Creating Activities for Contacts and Prospects for Email Treatments

Siebel Marketing can create an activity for each contact and prospect in your mailing. If you enable this option, then Siebel Marketing uses the Email Marketing - Update Status workflow to create the new activities. The workflow is called after each wave batch sent. You can customize the workflow if needed. The following information lists the workflow fields and the values used.

Workflow Field Values

Workflow Field	Value
Account Id	accountId for the contact or prospect
Campaign Id	campaignId
Description	treatmentName
Done	current date
Opportunity Id	opportunityId
Status	Done

Workflow Field	Value
Type	Email - Outbound

Note: The value of the Status field is set to Sent at the end of the Email Marketing - Update Status workflow. The Status field is mapped to the STAT_CD column in the S_CAMP_CON table. Although there is a LOV value called Delivered, the email process does not use this value.

The following procedure shows how to create activities for contacts and prospects for an email treatment.

To create activities for contacts and prospects for an email treatment

1. While creating the Email treatment, click the Advanced tab.
2. Check the Create Activity check box.

Using the Task UI Application to Create and Update an Email Treatment

Siebel Marketing includes the Create Email Treatment task to streamline the process of creating or updating an email treatment. For information on using the Task UI application, see *Siebel Fundamentals* . For details on customizing, activating, and assigning access privileges for tasks, see *Siebel Business Process Framework: Task UI Guide* .

The following example lists the steps that an end user performs to use the Create Email Treatment task.

To create or update an email treatment using the Task UI

1. Navigate to Offers, then the Email Treatments view.
2. Click the Email Setup Wizard button.
3. Choose to create a new treatment or edit an existing one, and then click Next. If editing an existing treatment, then select a treatment on the Pick Email Treatment screen.
4. In the Create Email Treatment screen, enter details for the treatment.
5. In the Define Email header screen, choose a delivery profile to populate the profile parameters.
6. In the Define Merge Elements screen, choose merge field set.

   Merge field set is an email list format that defines the available merge fields. Define the merge elements to embed in the email content, including trackable URLs and landing site URLs.
7. In the Email Template screen, select a template from the picklist.

   In the Email Body HTML screen, you can see the HTML content based on your selected HTML template.
8. Make changes in the HTML editor, then save your changes by clicking the Save Template button.
9. In the Email Template Option screen, choose whether to add another template.
10. In the Email Treatment Attachment screen, associate one or more documents as attachments if required.
11. In the Review Email screen, click Test Email to test the new email treatment, using an internal seed list of recipients.

    For more information on seed lists, see *Using Seed Lists for Testing Email Treatments*. Options for the format of the test email include HTML only, Text only, or Multi-part MIME.

About Using Personalization Categories When Editing Treatments

This topic describes the personalization objects that can be added to treatments. Personalization categories are categories of supported object types that can be embedded in treatments when you edit the treatment. Depending on which category type you select in the editor, the Personalization Elements menu (text editor) or the Items menu (HTML editor) contains the available elements for that category.

Personalization Categories

The personalization categories are listed in the following table. The channel that each personalization category can be used with is also shown.

Personalization Categories

Personalization Category	Available Channels	Description
Merge Fields	Email offers, Web offers, Fax offers	Merge Fields allow you customize treatments by contact or prospect. The Merge Fields that are available for you to select is determined by your configuration. If you are using the advanced mode, then merge fields can be extended using fields from the segmentation module. For more information, see *Using Merge Fields in Email Treatments*.
Product Catalog Items	Email offers, Web offers	Product catalog items are limited to those defined for the Product catalog page for the products associated with the treatment.
Response Forms	Email offers, Web offers	Typically, response forms are Web forms that a contact or prospect can use to respond to a treatment through the Web. For additional information, see *Adding Response Forms to Email Treatments*.
Events	All offer channels	You can associate an event with a treatment provided the event has been defined for this treatment in the Related Events link bar. For information, see *Associating Web Offers, Web Surveys, Events, and Trackable URL Personalization Items with Treatments*. When you add a related event, you can only display events with active dates that have a status code of Executing or In Progress.
Trackable URLs	Email offers, Web offers	Use trackable URLs to embed hyperlinks into a treatment that link to other treatments, or to generic Internet Web pages. When a contact or prospect clicks this link, Siebel Marketing records a campaign response. You can associate a trackable URL with a treatment provided the URL has been defined for this treatment in the Trackable URLs link bar. For information, see *Associating Web Offers, Web Surveys, Events, and Trackable URL Personalization Items with Treatments*.

Personalization Category	Available Channels	Description
Web Treatments	Email offers	You can associate a Web treatment with the treatment you are currently defining. You can relate the same Web offer to more than one email treatment. For example, you might have a Web offer and want to associate that Web offer with multiple email offers. In this case, each of these email offers has a link to that same Web offer. The list of Web treatments is limited to those defined for this treatment in the Related Web Treatments list view tab. For information, see *Associating Web Offers, Web Surveys, Events, and Trackable URL Personalization Items with Treatments*.
Web Surveys	Email offers, Web offers	You can associate a Web survey with the treatment you are currently defining. The list of Web surveys is limited to those defined for this treatment in the Related Web Surveys list view tab. For information, see *Associating Web Offers, Web Surveys, Events, and Trackable URL Personalization Items with Treatments*.
Dynamic URLs	Email offers	Use dynamic URLs to embed hyperlinks that can include merged fields into an email treatment. When emails are generated for the treatment by the Marketing Email server, the merged field content is dynamically merged into the URL. The list of dynamic URLs that is available when editing treatments is limited to those you define on the Dynamic URLs link bar. For additional information on Dynamic URL functionality, see *Adding Dynamic URLs to Email Treatments*.
Social Sharing URLs (This category is listed as Social URLs in the editor menus)	Email offers	Use social sharing URLs to embed hyperlinks, which are associated with one or more social network icons, into email treatments. Customers who are targeted for the email campaign can share the hyperlink on their social networks. The list of social sharing URLs that is available when editing treatments is limited to those defined on the Social Sharing URLs link bar. For additional information, see *Adding Social Sharing URLs to Email Treatments*.
Downloads	Web offers	You can select files that are available for downloading with the treatment. To be available for selection in the editor, the download items must have been defined in the Downloads list for the treatment. For additional information, see *Adding Attachments to the Web Treatments Downloads List*.

For Web offers, Web surveys, Events, and URLs (trackable, dynamic, and social sharing URLs) to be available for selection as personalization elements, you must add records to the relevant lists. For more information, see *Associating Web Offers, Web Surveys, Events, and Trackable URL Personalization Items with Treatments*.

About Using Personalization Items

You can insert any field from the Personalization Elements menu (Text editor) or Items menu (HTML editor) that is available for a treatment by selecting the item, then clicking the insert arrow when editing the treatment.

For example you might want to personalize an offer with the contact's name, such as: Exciting Offer for [Field: First Name] [Field: Last Name]. Using the Merge Fields category, select the personalization item [Field: First Name] and insert it into the desired location in the message. Repeat this procedure to add a last name. Typically, the tags for personalization items are enclosed in brackets ([and]). During run time, the target values are substituted for personalization elements.

Response forms, product links, Web treatment links, and Web survey links personalization items are encoded so that they become URL links containing the destination address, with campaign, treatment, and recipient codes included. Thus, the URL in any text-based email can become long.

The following list contains descriptions of how links to offer elements appear in an offer:

- **Web offer link.** The following is an example of how a link to a Web offer appears in an offer. The hyperlink is the image (banner_midsize.gif). When you click the link, the Web offer (Introducing Diet Vanilla Cake) appears.

```
<a href="[*Web Offer: Introducing Diet Vanilla Cake]"><img
src="banner_midsize.gif" border=0 width="149" height="43"></a>
```

- **Event link.** The following is an example of how a link to an Event appears in an offer. The hyperlink is Click Here. When you click the words Click Here, the specific Event appears.

```
<a href="[*Web Offer: Introducing Diet Vanilla Cake]">Click here</a>
```

- **Web survey link.** The following is an example of how a link to a Survey appears in an offer. The hyperlink is the image (customer_survey.gif). When you click the image, you are taken to a predefined Web survey page.

```
<a href="[*Web Survey: Diet Vanilla Cake Survey]"><img src="images/
customer_survey.gif" border=0 width="156" height="23"></a>
```

Web surveys are used to capture customer feedback or qualify leads. Using the Web Survey designer, you can design a survey one time, reuse questions and answers for multiple surveys, and deploy the survey on the Web and in the Call Center. For information on Web surveys, see *About Web Surveys and Landing Sites*.

- **Trackable URLs link.** The following is an example of how a link to a trackable URL appears in an offer. The hyperlink is Click Here. When you click the words Click Here, the specific URL appears, showing any specified data elements.

```
<a href="[*Trackable URL: DVC URL]">Click here</a>
```

- **Products link.** The following is an example of how a link to a Product URL appears in an offer. The hyperlink is the image (order_now.gif). When you click the image, the specific product page appears.

```
<a href="[*Product: Diet Vanilla Cake]"><img src="images/order_now.gif" border=0
width="81" height="23"></a>
```

Associating Web Offers, Web Surveys, Events, and Trackable URL Personalization Items with Treatments

This topic describes how to associate Web offers, Web surveys, Events, and Trackable URL personalization items with offer treatments. When you have associated these items with an offer treatment, they become available for selection from the Personalization Elements menu (Text editor) or Items menu (HTML editor) when editing the treatment, and they can be embedded in the treatment.

Note: Social Sharing URL and Dynamic URL personalization items can also be associated with email treatments. For information, see *Adding Social Sharing URLs to Email Treatments* and *Adding Dynamic URLs to Email Treatments*.

To associate Web offers, Web surveys, Events, and Trackable URL personalization items with treatments

1. Navigate to the Offers screen.
2. In the link bar, choose the treatment type to associate with an offer element, for example, Email Treatments.
3. Select a treatment, then click the Advanced view tab for the treatment.
4. Select one of the following link bars, depending on the type of element you want to make available from the Personalization Elements menu (Text editor) or Items menu (HTML editor):
    - Related Events
    - Trackable URLs
    - Related Web Treatments
    - Related Web Surveys
5. In the selected list, create a new record and save it.

    The item created can now be embedded in the treatment. For example, after you add a Web treatment on the Related Web Treatments link bar, if you navigate to an Edit view and select Web Treatments in the Categories menu (HTML editor) or Personalization Categories (text editor) menu, your newly added Web treatment appears in the list of elements.

    Note: Trackable URLs must start with http:// or the Web server address is inserted. If you have more than one URL, then separate each one with a semicolon (;) and no spaces.

About the Merge Fields Personalization Category

Use merge fields to customize treatments by contact or prospect. Contacts or prospects can have multiple fields associated with them, each field defining some attribute of a contact or prospect (for example, the person's first or last name). For each unique contact or prospect, the value of these fields might differ. You insert the merge field personalization element in the text and then the value of the Contact or Prospect field is populated into the text where you inserted the merge field personalization item.

The following simple example shows two prospects with the first names of Sally and Fred, how the personalization item appears in the treatment before and then after the contact or prospect field is populated.

Before population in the treatment text:

```
Hello [Field: First Name]!
```

When Sally receives the treatment, she gets the following:

```
Hello Sally!
```

When Fred receives the treatment, he gets the following:

```
Hello Fred!
```

In some contact or prospect records, a value might not exist for a non-numeric merge field. For example, the database record from which the value comes is a NULL entry. When the contact or prospect field is populated, the merge field can default to one of the following values:

- **Empty string.** The value is an empty string (a string containing no characters).
- **Unspecified.** The value is the word Unspecified.

Using Merge Fields in Email Treatments

Your application can be configured to use email merge fields in the following ways:

- **Basic.** Provides a static set of merge fields based on the campaign recipient business component. These merge fields are available when your organization has not licensed or deployed the marketing segmentation module.
- **Advanced.** Provides a flexible set of merge fields based on data from any data source or table within the application. The merge fields in this case are controlled by the Personalization Format (Email Server list format) that you select for the email treatment. For information on selecting a personalization format, see *Selecting a Personalization Format for an Email Treatment*.

For instructions on configuring the Basic or Advanced modes for email personalization, see *Siebel Marketing Installation and Administration Guide* . In the Basic configuration, each category has a number of personalization elements. For example, the Merge Fields category has the following personalization elements (depending on the personalization format used):

- [Field: M/M]
- [Field: First Name]
- [Field: Middle Name]
- [Field: Last Name]
- [Field: Account]
- [Field: Account Location]
- [Field: Job Title]
- [Field: Work Phone #]
- [Field: Home Phone #]
- [Field: Cellular Phone #]
- [Field: Fax Phone #]
- [Field: Email Address]
- [Field: Current Date]
- [Field: Source Code]
- [Field: Contact Id]
- [Field: Prospect Id]
- [Field: Camp Con Id]
- [Field: Segment/List Name]
- [Field: Forwarder Message]
- [Field: Subscription List]

Note: Current Date is a calculated field. This merge field is replaced by the Campaign Send Date when the campaign is launched.

You can use merge fields in the body of a text or HTML email treatment, in the same way that they are used within the text or HTML of other treatment types. Additionally, you can use merge fields in the following areas related to email treatments:

- **Subject Text field of the email treatment.** The text to appear in the subject line of the email.
- **From Address parameter value.** A parameter of the Email Marketing Server in User Delivery Profiles.
- **Reply To Address parameter value.** A parameter of the Email Marketing Server in User Delivery Profiles.

For example, to personalize the From Address parameter with a first name, navigate to the Administration - Marketing screen, then the Servers view. Select the Email Marketing Server and enter `${first name}@example.com` in the From Address field.

Selecting a Personalization Format for an Email Treatment

When you create an email treatment, the values for the Email Marketing Server and Personalization Format are set based on settings established by your administrator.

The default value for the Personalization Format field is Default Merge Fields. If the field value is not a path name, then the available merge fields come from the Campaign Recipient business component user property. Otherwise, the columns in the report identified by the path are displayed in the Merge Fields picklist. You can change the default value for this field by using the Email Personalization Format server parameter for your object manager.

The following procedure shows how to select a Personalization Format (merge fields) for an email treatment.

To select a Personalization Format (merge fields) for an email treatment

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Treatments list, click the name of the email treatment.
3. In the Email Treatment form, click the Merge Field Set button.
4. In the dialog box, select the appropriate format from the folders that appear.

   For more information about creating Email Server formats, see Siebel Marketing Installation and Administration Guide.
5. In the Edit Email form, from the Personalization Categories menu (text editor) or the Categories menu (HTML editor), choose Merge Fields.

   The merge fields must appear in the Personalization Elements menu (text editor) or Items menu (HTML editor).

About Creating Conditional Content in Treatments

There are two personalization elements that can be used to generate conditional content within an email treatment. Each of these is made up of the following personalization elements:

- **If-Then-Else.** Determines whether or not a block of text or HTML is removed from an outgoing email 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). For more information, see *About the If-Then Personalization Element*.

- If the merge field is defined, then the block of text or HTML remains in the outgoing email.
- If the merge field is not defined, then the block of text or HTML is removed from the outgoing email.

- **Named Blocks.** Used to decide whether or not to insert a block of text or HTML into an outgoing email by comparing one string with another. For more information, see *About the Named Blocks Personalization Element*.
  - If the two strings are identical, then the block is inserted.
  - If the two strings are not identical, then the block is not inserted.

The components of these personalization elements must be placed in the correct locations in the text or HTML email treatment or an error occurs.

About the If-Then Personalization Element

The following table shows a list of If-Then personalization element components.

If-Then Personalization Element Components

Personalization Element	Description
$(endif)	The End-If component closes the current If-Then-Else personalization element.
$(if [Field: FieldName])	The**If** component is required to start an If-Then-Else personalization element. The**If** component determines if the merge field named [FieldName] has a value. If there is a value for [FieldName], then the text between this If-Then-Else component and the next If-Then-Else component is not removed from the email.

The following is a simple example of the use of an If-Then personalization element. If the first name is defined, then the contact's or prospect's first and last name appears. If the first name is not defined, then only the last name appears:

```
$(if [Field: First Name])
Dear [Field: First Name] [Field: Last Name],
$(else)
Dear Mr. or Mrs. [Field: Last Name],
$(endif)
```

Nesting If-Then personalization elements (placing one within another) is an acceptable practice. The following is an example of nesting these elements:

```
$(if [Field: First Name])
 $(if [Field: Last Name])
Dear [Field: First Name] [Field: Last Name],
 $(else)
Dear [Field: First Name],
 $(endif)

$(elseif [Field: Last Name])
Dear Mr. or Mrs. [Field: Last Name],
$(else)
To Whom It May Concern:
$(endif)
```

Use of indentation indicates the nesting of one If-Then personalization element within another. Indentation is not necessary, but makes it easier to read. Also, in this example, each component is on its own line. This use of separate lines is also not necessary, but it makes reading the treatment easier.

After the Email Marketing Server makes the decision about what text or HTML to remove, the If-Then-Else personalization element components are also removed (including their trailing line breaks).

Inserting If-Then Statements in an Email Treatment

The following procedure shows how to insert if-then statements in an email treatment.

To insert if-then statements

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Treatments List, click an email treatment.
3. Select a template to edit.
4. From the If Then Rules menu, choose If.
5. In the secondary menu, choose a merge field to be personalized.
6. In the tertiary menu, choose a conditional operator.
7. Click the Value button (the book icon) and enter the value of the merge field to be personalized.
8. Select a location in the template to insert the personalized If statement.
9. Click the Insert Rule button (which is a down arrow icon).
10. Place the conditional content between $(if) and $(endif) tags.
11. (Optional) Add $(elseif) conditions if more than one iteration of the content must appear.
12. Place default content after the $(endif) tag.

About the Named Blocks Personalization Element

The following table shows a list of Named Blocks personalization element components.

Named Blocks Personalization Element Components

Personalization Element	Description
$(DefineBlock "MatchString")	Define Block component. 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.
$(EndBlock)	End Block component. Ends a block of text or HTML started with the Define Block component.
$(InsertBlock "MatchString")	Insert Block component. A block of text or HTML is inserted at the location this component is placed when MatchString is identical to the MatchString of a Define Block component. This comparison is case sensitive.

Note: The string comparison is case sensitive.

The following is a simple example of the use of a Named Blocks personalization element:

```
<P>The temperature of your favorite drink is $(InsertBlock "[Field: Favorite
Drink]").</P>
$(DefineBlock "Coffee")
<B>hot</B>
$(EndBlock)

$(DefineBlock "Iced Tea")
<B>cold</B>
$(EndBlock)

$(DefineBlock "Water")
<B>cool</B>
$(EndBlock)
```

In this example, the merge field named Favorite Drink is the value Coffee. After the merge fields are populated, the following sentence appears:

```
The temperature of your favorite drink is hot.
```

The HTML source reads:

```
<P>The temperature of your favorite drink is <B>hot</B>.</P>
```

If there is no match for an Insert Block component match string, then the Insert Block component is not replaced by any text or HTML. After the Email Marketing Server resolves all matches, the remaining Named Block personalization element components are removed (including their trailing line breaks and any text or HTML between Define Blocks and End Blocks).

Note: The Define Block and End Block components can be placed within the HTML HEADER tags. This placement can make the email treatment more readable.

Inserting Named Blocks in an Email Treatment

The following procedure shows how to insert named blocks in an email treatment. For additional information about named blocks, see *About the Named Blocks Personalization Element*.

To insert named blocks

1. Navigate to the Offers screen, then the Email Treatments view.
2. In the Treatments List, click an email treatment.
3. Select a template to edit.
4. From the If Then Rules menu, choose Insert Block.
5. In the secondary menu, choose a merge field.
6. In the tertiary menu, choose a merge field to be personalized.
7. Select a location in the template to insert the block.
8. Click the Insert Rule button to insert the block to be personalized.
9. After inserting the named block, you must define the values that have personalized content as follows:
    a. From the If Then Rules menu, choose Create Block.
    b. Click the Value button and enter the value of the personalized item to be linked to this block.
    c. Click in the workspace after the previously inserted Insert Block statement.
    d. Click the Insert Rule button.

e. Place conditional content between $(DefineBlock "merge field") and $(EndBlock) statements.

About Applying Localization Rules to Treatments

Each treatment record contains a locale value. The locale is used to locate and display the localized landing page for response forms. When you create an email treatment record, the locale value defaults to the value set in your profile. You can change the value to match your business needs. When you launch the campaign, the locale assigned to the email treatment is used for all recipients.

The default character set for emails is UTF-8 which is the value set in the Charset attribute for the email's Content-Type header. To change the Charset attribute, select an Email Marketing Server profile with the correct Charset attribute or request an Administrator to make the changes necessary to the Email Marketing Server profile that you use.

The character set for the template you upload must be the default character set configured for the operating system you are using (the current code page on Windows or UTF-8 on UNIX). On UNIX platforms, an environment variable (SIEBEL_FILE_ENCODING) can be assigned to a character set to use in place of UTF-8 when reading templates. If the original template file contains a BOM (Byte Order Mark), then the character set of the template file can be detected. This detection is useful when the character set differs from the platform default character set.

CAUTION: Be careful when using a character set for outgoing email that differs from the platform default character set or UTF-8. If the Email Marketing Server character set is not compatible with the character set of the original template file that is read from disk, then the resulting email text might be unreadable.

Previewing Treatments

You can preview what a treatment looks like when received by a contact or prospect in the following ways:

- **Click Verify and Preview in the appropriate Edit Template view.** Clicking this button previews the selected template and tests the behavior of conditional content to various merge field values. For more information, see the topic in this chapter that applies to the template you are using.
- **Use the Test Treatment feature.** This feature is one way to confirm configurations for email and fax treatments. For example, when you use this feature to test email treatments you confirm configurations such as Email Marketing Server configuration and proper template setup for use in multipart MIME. For more information, see *Testing Campaigns That Have Email and Fax Treatments*.

About Fax Treatments

Fax treatments are available in Siebel Marketing and Siebel Campaigns. Using the Fax Treatment view, a marketer can create personalized faxes for targeted distribution during a campaign.

The Fax Treatment view contains the following view tabs:

- **Treatment Details.** This form contains additional fields that you can use to specify a predefined communications Delivery Profile for fax distribution, an Activity check box that can be used to track the treatment as an activity, and approval check boxes and fields if the fax treatment requires approval from your

company's marketing and legal departments. The Treatment Details form also displays a unique identifier for the treatment in the Treatment Code field.

- **Edit Fax**. Use this form to choose a treatment template and specify the personalization elements that are included in your fax design.
- **Delivery Profile.** This read-only list displays parameters of the Siebel Communications profile chosen for the fax treatment. For more information on setting up a delivery profile for a fax treatment, see Siebel CTI Administration Guide. For more information on testing and distributing fax campaigns, see *Testing Campaigns That Have Email and Fax Treatments*.
- **Literature.** This list shows the company and product information associated with the media treatment. You can add additional items to this list if desired. For more information, see *Associating Literature with Treatments*.
- **Related Events.** Displays events related to fax treatments.

Process of Working with Fax Treatments

To set up fax treatments, perform the following topics:

- *Associating Templates with Fax Treatments*
- *Creating Delivery Profiles and Associating with Fax Treatments*

Related Topics

Process of Creating and Modifying Offers

Delivery Profiles for Fax Treatments

Associating Templates with Fax Treatments

A template can be associated with a fax treatment. To edit the template, see *About Creating and Editing Treatment Templates*.

The following procedure shows how to associate a treatment template with a fax treatment.

To associate a treatment template with a fax treatment

1. Navigate to the Offers screen, then the Fax Treatments view.
2. In the Fax Treatments list, select the fax treatment, and click the Edit Fax view tab.
3. In the Edit Fax form, create a new record.
4. Click the Template Name select button.
5. In the Pick Treatment Template dialog box, select the predefined template for the fax treatment, and click OK.

   Only treatment templates that you add to the Treatment Templates list are available for selection. For more information, see *About Creating and Editing Treatment Templates*.
6. Save the record.

   The template contents appear on the far side of the view, and Edit Template and Verify & Preview buttons become available.

Delivery Profiles for Fax Treatments

Delivery Profiles are available in Siebel Marketing. They are required for fax treatments. Delivery Profiles are created using the Communication Administration screen's Communications Drivers and Profiles view. Fax treatments are distributed using the fax communications driver provided with your fax application.

Siebel Communications Server does not interface directly with fax servers. Most popular fax servers provide email gateways that connect themselves to an email server such as Microsoft Exchange Server or an SMTP server. The host email server recognizes messages with specially formatted email addresses and directs those messages to the fax server.

Siebel Communications Server interfaces indirectly with this type of fax server through the host email server. Except for the email address format, it makes no difference to Siebel Communications Server whether it is sending an email or a fax. Before fax treatments can be sent out, you must select one of the defined profiles.

Default parameter values are set for each communications driver within the Communication Administration screen's Communications Drivers and Profiles view. You can create customized communications profiles for each of these driver types that override the default values for that driver. For example, a profile might specify customized From and Reply-To email addresses. For more information about communications drivers and profiles, see Siebel CTI Administration Guide. For more information about using delivery profiles, see *Creating Delivery Profiles and Associating with Fax Treatments*.

Creating Delivery Profiles and Associating with Fax Treatments

This topic describes how to create a delivery profile and associate it with a fax treatment.

Creating a Delivery Profile

Use the following procedure to select a communications driver and create a profile that you can associate with fax treatments.

To create a delivery profile for fax treatments

1. Navigate to the Administration-Communications screen, then the Communications Drivers and Profiles view.
2. In the Communications Drivers list, select a driver, and click the Profiles view tab.
3. In the Profiles list, create a new record:
    a. In the Name field, enter a name for the new profile.
    b. In the Organization field, accept the default organization, or click the select button to select another organization.
    c. In the Responsibilities field, click the select button, and in the Responsibilities list, select the responsibility associated with profile access.

       The Responsibilities field is used in conjunction with Siebel eMail Response. It does not apply to outbound email campaigns.
4. Save the profile, and click the Driver Parameters view tab.
5. Edit the parameters for the profile, and save the record.

Associating a Delivery Profile with a Fax Treatment

The following procedure shows how to associate a delivery profile with a fax treatment.

To associate a delivery profile with a fax treatment

1. Navigate to the Offers screen, then the Fax Treatments view.
2. In the Treatment Details form, select the treatment record.
3. In the Delivery Profile field, select the delivery profile for the treatment.

Web Treatments

Web treatments are targeted HTML treatments that can be displayed on the Siebel Web Marketing microsite. Web treatments are available in Siebel Marketing and Siebel Web Marketing.

Using the Web Treatments view tabs, you can specify a template containing content for the Web treatment, edit the template and add personalization elements, identify links to related Web offers, surveys, related events and trackable URLs and attach relevant product information that can be downloaded by the Web site visitor. The following table shows the view tabs available in the Web Treatments view.

Web Treatments View Tabs

View Tab Name	Description
Treatment Details	This form contains additional fields that you can use if the Web treatment requires approvals from your company's marketing and legal departments. It also provides a unique identifier for the treatment in the Treatment Code field. **Note:** If you select the Inbound Active Flag check box, then the Web treatment appears to eligible users in the Web Marketing home page. The Featured Treatments applet checks this flag before displaying a Web offer to an eligible contact or prospect.
Edit Web Treatment	Use this form to attach templates containing the content of the Web treatment. To be selected here, templates must first be added to the Treatment Templates list. For more information, see *About Creating and Editing Treatment Templates*. • Use the HTML editor to edit the template content as well as select personalization items and insert items into the template. • Click the Verify & Preview button to verify the template edits and display the finished Web treatment as it appears on the Web page.
Downloads	Use this list to provide a list of literature related to the offer that is available for download by the Web site visitor.
Advanced	Contains the Related Web Surveys, Related Events, and Trackable URLs link bars. Use these lists to specify Web surveys, related events, and trackable URLs that you can embed in your Web treatment, using the Edit Web Treatment personalization elements controls. For more information, see *Associating Web Offers, Web Surveys, Events, and Trackable URL Personalization Items with Treatments*.

View Tab Name	Description
Follow up Activity	Allows marketers to schedule a follow-up activity when the treatment is delivered.
Real-Time Details	This view is used only if Siebel Marketing is integrated with the Oracle Real-Time Decisions (RTD) product.

The following topics detail how to create a basic Web treatment:

- *Associating Templates with Web Treatments*
- *Adding Attachments to the Web Treatments Downloads List*

Related Topic

Process of Creating and Modifying Offers

Associating Templates with Web Treatments

Complete the steps in the following procedure to associate a template with a Web treatment. To edit the treatment template, see *About Creating and Editing Treatment Templates*. Templates must first be added to the Treatment Templates list to be available for selection in the Edit Web Treatment view tab. For more information, see *About Creating and Editing Treatment Templates*.

The following procedure shows how to associate a treatment template with a Web treatment.

To associate a treatment template with a Web treatment

1. Navigate to the Offers screen, then the Web Treatments view.
2. In the Web Treatments list, select the treatment, and click the Edit Web Treatment view tab.
3. Create a new record.
4. Click the Template Name select button.
5. In the Pick Treatment Template dialog box, select the template, and click OK.

   To be available for selection, templates must first be added to the Treatment Templates list. For more information, see *Creating Treatment Templates and Adding to the Template List*.
6. Save the record to associate the template with the treatment.

Adding Attachments to the Web Treatments Downloads List

The Web Treatment Downloads list displays literature and other files that can be downloaded with the treatment. Literature items must be included in the literature list to be available for selection in this view.

The Downloads list shows files that can be included in the selected Web treatment for download. Any literature other than treatment templates can be included in a treatment as a download. The fields in this view are shown in the following table.

Fields in the Web Treatment Downloads View

Field	Comment
Comments	Populated from the literature table.
Description	Populated from the literature table.
File Name	Populated from the literature table.
File Type	Populated with the file extension.
Modified	Populated with the file modification date.
Name	Click the Name select button to select a literature item.
Release Date	Populated with the date that the literature item was released.
Size (In Bytes)	Populated with the file size in kilobytes.

Files added here are not yet available for downloading. In this view, you select a set of files to be able to include as downloads from your Web treatment. These files then appear in the personalization Items menu of embeddable objects in the HTML Editor tool bar when you choose Downloads from the personalization Categories menu.

You can select any file from that list and copy it into the template file and that file becomes available for downloading. These files are displayed in the Embedded Object list as `[Download:Literature Item Name].`

When the Siebel Marketing software encodes this tag, it uses the Literature Item Name as the hyperlink text. The marketer can override this default behavior by using the wildcard (*) functionality and manually defining the HREF link, as described in *About Using Hyperlinks (HREF) in Treatment Templates*.

The following procedure shows how to attach literature in the Downloads view.

To attach literature in the Downloads view

1. Navigate to the Offers screen, then the Web Treatments view.
2. In the Web Treatments list, select the treatment, and click the Downloads view tab.
3. In the Downloads list, select the literature to make available for downloading from the Web treatment:
    a. Click the menu button and create a new record.
    b. In the Downloads form, click the Name select button.
    c. In the Pick Literature Item list, select the item, and click OK.

Creating Other Treatment Types

You can create other treatment types, such as direct mail, media treatments, and phone depending on the application you use:

- *Creating Contact Call Treatments and Associating a Response Template*
- *Direct Mail Treatments*
- *Media Treatments*
- *Phone Treatments and Direct Sales Treatments*

Creating Contact Call Treatments and Associating a Response Template

Contact call treatments are available in Siebel Pharma Marketing and Siebel Pharma Campaigns only. Contact call treatments are executed through the Siebel Pharma sales application. Use the Contact Call treatment view to define specific product messages to be delivered as part of pharma call detailing. The contact call treatment view includes the following view tabs:

- More Info. This form contains fields that you use if the contact call treatment requires approvals from your marketing and legal departments. It also provides a unique identifier for the treatment in the treatment code field.
- Response Templates. Use this list to create potential responses to the product message created as part of the contact call treatment.

  For instructions on how to create response templates, see *Associating a Response Template to a Contact Call Treatment*.
- My Messaging Plan List. Displays messaging plans associated with the Contact Call treatment.

For more information on executing contact call treatments and for information on messaging plans, see *Siebel Life Sciences Guide* .

Creating a Contact Call Treatment

The following procedure describes how to create a Contact Call treatment.

To create a Contact Call treatment

1. Navigate to the Offers screen, then the Contact Call Treatments view.
2. In the Treatments list, create a new treatment.

   Contact Call is displayed in the Channel field.
3. In the Contact Call Treatments list, complete the remaining fields.

   For more information about creating treatments, see *Process of Creating and Modifying Offers*.
4. Click the Contact Call treatment name.
5. In the More Info tab, complete the fields.

Associating a Response Template to a Contact Call Treatment

Response templates associated with a contact call treatment determines the choice of responses that can be recorded as part of call reporting in Siebel Pharma.

The following procedure shows how to associate a response template with a contact call treatment.

To associate a response template with a contact call treatment

1. Navigate to Treatments screen, then the Contact Call Treatments view.
2. Click the treatment name.
3. In the Response Template list, create a new record.

Direct Mail Treatments

Direct mail treatments are available in the Siebel Marketing application. For instructions about how to create a direct mail treatment, see *Process of Creating and Modifying Offers*.

Using the Direct Mail Treatment view, you can associate Literature documents with a treatment. Siebel Marketing does not provide a mechanism to print direct mail treatments but can pass output lists to vendors for execution.

You can generate output or distribution list of contacts during the campaign launch. The customer information is arranged according to a predefined list format, and the list can be delivered to the appropriate vendors through a predefined method (for example, FTP or email). For more information about list output and vendors, see *About Previewing and Generating Lists*.

The Direct Mail Treatment view contains the following view tabs:

- **Treatment Details.** This form contains additional fields that you can use if the direct mail treatment requires approvals from your company's marketing and legal departments. It also provides a unique identifier for the treatment in the Treatment Code field.
- **Literature.** This list shows the company and product information associated with the treatment. To add literature to the list, see *Associating Literature with Treatments*.
- **Related Events.** Displays events related to direct mail treatments.
- **Follow up Activity.** Allows marketers to schedule a follow-up activity when the treatment is delivered.
- **Direct Mail Template.** Allows you to associate a template with the direct mail treatment.

Media Treatments

Media treatments are available in Siebel Marketing and Siebel Campaigns. For more information on how to create a media treatment, see *Process of Creating and Modifying Offers*.

Use the Media Treatments view to define indirect treatments. Types of media treatments available in the standard product are Billboard, Print Ad, Press Release, Radio, TV, Seminar, and Trade Show. When you define indirect treatments, you know the general characteristics of your audience but not its exact composition.

The Media Treatments view contains the Treatment Details, Literature and Related Events view tabs.

- **Treatment Details.** This form contains additional fields that you can use if the media treatment requires approvals from your company's marketing and legal departments. It also provides a unique identifier for the

treatment in the Treatment Code field. You can specify the type of media to use to distribute the treatment using the Type field.

- **Literature.** This shows the company and product information associated with the media treatment. You can add additional items to this list if desired. For example, if the media treatment type is press release, then you can associate the press release content with the treatment for later referral. For more information, see *Associating Literature with Treatments*.
- **Related Events.** This indicates if the media treatment is being used to promote a specific event or set of events.
- **Follow up Activity.** Allows marketers to schedule a follow-up activity when the treatment is delivered.

Phone Treatments and Direct Sales Treatments

Phone treatments and direct sales treatments are available in Siebel Marketing and Siebel Campaigns.

Use the Phone Treatments view or Direct Sales Treatments view to define telemarketing treatments to be executed using Siebel Call Center or another application. The following table shows the view tabs in the Phone Treatments view.

Phone Treatments View Tabs

View Tab Name	Description
Treatment Details	This form contains more fields that you can use if the phone treatment requires approvals from your company's marketing and legal departments. It also provides a unique identifier for the treatment in the Treatment Code field.
Literature	This list shows the company and product information associated with the phone treatment. You can add additional items to this list if desired. For more information, see *Associating Literature with Treatments*.
Related Events	Displays events relating to phone treatments.
Advanced	This form associates a treatment group with the phone treatment. This tab is not available in the Direct Sales Treatments view.
Follow up Activity	Allows marketers to schedule a follow-up activity when the treatment is delivered.
Real-Time Details	This view is used only if Siebel Marketing is integrated with the Oracle Real-Time Decisions (RTD) product.

Associating Literature with Treatments

Literature about the products or services offered during a campaign can be associated with a treatment using the Literature view tab in the Direct Mail, Media, Phone, and Fax Treatment views. To add attachments to email treatments, see *Editing Treatments*.

You can associate literature items, such as white papers, presentations, brochures, advertising material, and product specifications with your treatment to create a specialized library of information. You can use this library when reviewing details of treatments that are being reused in current campaigns.

In addition, a call center agent can view the literature while launching the campaign. The agent can also include literature items with faxes, email messages, or correspondence sent to a contact. Literature items are then included when you create a new correspondence record for a contact.

Before you can select literature to associate with a treatment, you must add the literature items to the Literature screen's All Literature Across Organizations list. For more information about adding literature that you can associate with your treatments, see *Siebel Applications Administration Guide* .

Use the following procedure to associate specific literature items with your treatments.

To associate a literature item with a treatment

1. Navigate to the Offers screen.
2. From the Treatments link bar, select the appropriate treatment type.
3. Click the treatment name.
4. In the Literature list, create a new record.
5. In the Literature form, click the Name select button.
6. In the Pick Literature Item dialog box, select the literature, and click OK.

Implementing Test and Control Groups for Treatments

Test and control groups allow you to isolate variables in the effectiveness of a treatment. The test group contains treatment recipients who are tested for a particular factor. The control group does not receive this factor, and is therefore separated for purposes of comparison.

The following procedure shows how to implement test and control groups for a treatment.

To implement test and control groups for a treatment

1. In Siebel Tools, add an LOV value to the treatment to identify it as Control or Test.
2. Add a filter to all export list formats that excludes any customer rows that receive control treatments. You might have to extend the list export business model to join to the treatment type (for example, S_CAMP_CON to S_DMND_CRT_PRG).
3. Add a search specification to any Call Center screens, so that outbound telemarketing calls do not show any recipients of the control treatment.
4. Associate both test and control treatments with the campaign.
5. Use a segment tree to split the test and control groups. Allocate the tree branches to the test and control treatments.
6. Load the campaign, including both test and control segments.

6 Creating and Using Analysis for Web Marketing

Creating and Using Analysis for Web Marketing

This chapter describes how to create and use Analysis for Web Marketing. It includes the following topics:

- *Creating Analysis in Use in Siebel Marketing*
- *Creating Analysis Collection in Use in Siebel Marketing*

Creating Analysis in Use in Siebel Marketing

Follow these steps to navigate in the New Views added in Siebel Marketing:

1. Navigate to *Segments* Screen.
2. Go to *Analysis in Use* view.
3. Click on **+** to create a new record.
4. Click on the **Pick** icon from the Folder Location field.
5. Go to the Catalog folder where your Analysis is present.
6. Choose the Analysis and hit the **OK** button.
7. Modify the value of the Name field if required.

Creating Analysis Collection in Use in Siebel Marketing

Follow these steps to navigate in the New Views added in Siebel Marketing:

1. Navigate to *Segments* Screen.
2. Go to *Analysis Collection in Use* view.
3. Click on **+** to create a new record.
4. Click on the **Pick** icon from the Folder Location field.
5. Go to the Catalog folder where your Analysis Collection is present.
6. Choose the Analysis and hit the **OK** button.
7. Modify the value of the Name field if required.

   It adds all the Analysis under the Collection folder.

Note: The Priority is added by default. If needed, you can change the Priority value. This is used for De-Duplication purpose.

7 Planning and Designing Marketing Campaigns

Planning and Designing Marketing Campaigns

This chapter describes how to plan and design marketing campaigns that meet your business needs. It includes the following topics:

- *About Siebel Campaigns*
- *About Creating and Using Activity Plans*
- *Process of Planning and Designing Marketing Campaigns*
- *Roadmap for Setting Up Campaigns*
- *Process of Setting Up Teams and Groups*
- *Process of Setting Up Campaign Execution Options*
- *Process of Setting Up Campaign Quotas*
- *Process of Setting Up Campaign Assignment Skills*
- *Using Siebel Marketing with Siebel Events Management*
- *Testing Campaigns*
- *About Using Response Management*
- *Reviewing and Adding Campaign Elements in Campaign Explorer*
- *Creating an Analysis Load Format*
- *Associating Analysis Load Format with Analysis and Analysis Collection*
- *Adding an Analysis to a Campaign*
- *Process of Loading Customers in Campaigns*
- *Using Waves with Campaigns*
- *About Previewing and Generating Lists*
- *Integrating Contact Planning Rules in Marketing Campaigns*

About Siebel Campaigns

The Siebel Campaigns module is available to users with a license for Siebel Marketing or Siebel Campaigns.

A *campaign* is the initiative in which you convey a marketing message to one or more groups of people. Typically, campaigns deliver a promotional offer to retain current customers or to acquire new customers using different channels of communication. For example, you might launch a phone campaign that invites contacts to sign up for a special promotion or deliver a direct mail campaign that provides a sample of a new product and a coupon offer to existing customers.

The goal of a marketing campaign is to create an opportunity that ultimately results in a sale, brand recognition, or some other type of response. Marketers use both direct and indirect campaigns to achieve these objectives.

- Direct campaigns target individuals using multichannel approaches such as email and telephone. Contacts for the campaign are derived by applying segmentation criteria against a database of customer information and generating a list or by purchasing or renting a list of prospects. Multiple campaigns can use the same segment criteria.
- Indirect campaigns target indeterminate groups of people whose general characteristics you might know, but whose exact composition you do not know. Examples of indirect campaigns are those that use television, radio, print ads, or other forms of media for delivery of the message. An indirect campaign is associated with a marketing program's stage rather than with a specific segment or list.

The Siebel Campaigns module is used by Siebel Business Applications such as Call Center and Sales. The campaigns are the same as the campaigns that result from a campaign in the marketing application. Campaigns contain contacts and prospects, offers, activities, and other campaign execution elements.

Using Siebel Campaigns you can distribute your company's offer using television, radio, billboards, direct mail, fax, email, the Web, and phone treatments.

The campaign creation process begins with an administrator, who creates the offers and associates the offers and treatments with a campaign, and allocates segments. The administrator then adds the literature, contacts and prospects, call summary, and call guide. The administrator also determines which script, if any, is associated with the campaign and who is on the campaign team. A campaign manager can associate quotas and incentive awards with the campaign to track progress and reward performance.

The administrator can monitor the status of campaigns using the Campaign Explorer view to display the Contacts, Activities, Offers, and Literature for each campaign, and by using Campaign and Response Charts.

About Creating and Using Activity Plans

Siebel Marketing's Activity Plans views associate predefined planning and milestone activities and tasks with a template (activity plan). Then, you can assign the templates to your marketing programs and campaigns. This assignment creates one or more activities that are associated with a campaign or a program.

Note: Activities are not created for contacts loaded into a campaign.

Activity Plans can be designed to help you plan the marketing program or campaign, or launch it. Before you link an activity plan to your campaign, you have to create activity templates or customize existing templates to reflect your business process and needs. Use templates to define a generic set of activities that can be reused.

For example, a marketing department production manager might design an activity plan template called Direct Mail that contains regularly scheduled campaign activities such as meetings with creative or budgetary staff and start tasks. Using the Campaign Activity Plans view the manager can associate the activity plan template with the current campaign and then assign resources, define priorities and status and so on to each predefined task, adding comments where necessary.

The activity plan record is flagged to indicate how the activity plan is to be used. If the activity is designated as a planning task, then none of its activities are copied to the campaign record when it is created. If the activity plan is designed for the execution of the program or campaign, then select the Recurring check box, and the set of activities are recreated and associated with each occurrence.

If your marketing program or campaign has a mixture of planning and start activities, then create two plans (one for planning and one for execution tasks) and assign them both to the program or campaign.

Process of Planning and Designing Marketing Campaigns

Siebel Marketing's program and campaign organizational tools manage activities, documentation, milestones, and schedules for your marketing campaigns including:

1. *Creating Activity Templates*
2. *Associating Activity Plans with Programs and Campaigns*
3. *Viewing Timelines*
4. *Associating Documents with Programs and Campaigns*

Creating Activity Templates

Use Activity Plan Templates to create and manage activities for programs and campaigns. You define templates using the Application Administration screen's Activity Templates and Activity Template Details views.

A campaign's activity plan template can include information on the type of activity, duration and status, a list of activities associated with the program or campaign (preparation, telephone calls, milestones, tasks), and so on.

Creating an Activity Plan Template

The following procedure shows how to create an activity plan template.

To create an activity plan template

1. Navigate to the Administration - Data screen, then the Activity Templates view.
2. In the Activity Plan Templates list, create a new record.
3. In the Template form, complete the fields and save the record.
    a. Enter a name for the template.
    b. In the Type drop-down list, choose Program Container for a marketing program template, and Campaign as an activity template for campaigns.
    c. Enter a template description.
    d. In the Auto Trigger field, select the check box if the activity is associated with the occurrence level.
    e. Select the Public check box if the activity plan can be used by others not on your team.

Creating Activities for a Template

The following procedure shows how to create activities for a template.

To create activities for a template

1. Navigate to the Administration - Data screen, then the Activity Templates view.
2. In the Activity Plan Templates list, select a template.
3. Click the Activity Template Details view tab.
4. In the Activity Template Details list, create a new record.
5. Complete the necessary fields for each activity assigned to the template.

6. From the Type drop-down list, choose an activity type.

   Note: Repeat Step 2 through Step 6 to add activities to the template.

7. Save the activity.

Associating Activity Plans with Programs and Campaigns

Use the Campaigns or Programs screen's Activity Plans view to associate a template containing predefined activities with a program or campaign. An Activity Plan Template's type must be set to Program Container for marketing programs or Campaign for marketing campaigns to be available for selection.

The Activity Plans view has the following elements:

- The Campaign or Program form, which provides details of the selected campaign or program.
- The Templates list, which can contain one or many activity plan templates.
- The Activities list, which displays activities associated with the selected template.

The following procedure shows how to associate an activity plan and activities with a campaign or program.

To associate an activity plan and activities with a campaign or program

1. Navigate to the Campaigns or Programs screen.
2. In the Campaigns or Programs list, click the campaign name or program name.
3. Click the Plan view tab.
4. In the Plan link bar, click Activity Plans.
5. In the Activity Plans list, create a new record.

   In the new row, the Recurring field contains a check mark.
6. Complete the necessary fields:

   a. From the Template drop-down list, select a predefined template.
   b. Edit the existing description if desired, or enter a description of the plan.
   c. Select Suppress Calendar to populate the check box if you do not want these activities added to your calendar view.
   d. Clear Recurring if the activity must be not be written to the campaign record for every occurrence of the campaign or program.

      When you clear the Recurring check box, you indicate that this set of planning tasks is only performed one time for all occurrences. By default, each new activity plan is set to Recurring when you assign it to a campaign or activity.

      A list of activities appears in the Activities list. Note that the dates are populated by using the Lead Time column relative to the time that the activity template was associated.
7. To change the times or dates of any of the activities, click the Schedule view tab for the campaign.
8. In the Schedule link bar, click Activity List.

Viewing Timelines

Timelines are available for programs, campaigns, event plans, and events. Timelines provide calendar views of scheduled, active, and completed marketing tactics in a Gantt chart format. The chart is divided into weeks and months. Start field and End field values determine the placement of the timeline bars. Timelines help you determine whether scheduling is appropriate and on track for planned marketing efforts. Timeline bars are color-coded to help you identify the status of programs and campaigns. You can place the cursor over a timeline bar to display more details. The following table shows the timeline types that appear in the link bar of the Marketing Calendar screen.

Marketing Calendar Timeline Types

Timeline Type	Description
Tactics	Shows active, completed, and planned marketing tactics, including campaigns, events, event plans, and programs. You can click the name of any tactic displayed in one of the timelines to be navigated to the details for that tactic. The path displays the appropriate screen (campaign, event, event plan, or program) according to the tactic type.
Programs	Shows active, completed, and planned programs. To display the child campaigns and related events, double-click the folder icon next to a program in the chart.
Campaigns	Shows active, completed, and planned campaigns.
Media Calendar	Shows active, completed, and planned media treatments.
Events	Shows active, completed, and planned event plans and events.

The following procedure describes how to view timelines.

To view timelines

1. Navigate to the Marketing Calendar screen.
2. In the Marketing Calendar link bar, click a timelines type, such as Tactics, Programs, Campaigns, Media Calendar, or Events.
3. Select the start date for which you want to view timelines.

   By default, timelines are shown for a period starting on the current day. However, you can select a different start day, using the calendar icon at the start of the screen.
4. Select the end of the period for which you want to view timelines by clicking one of the buttons shown in the following table.

Select this button	To view timelines for this time period
D/H	To display timelines for the start day.
W/D	To display timelines for each day of the week after the start date.

Select this button	To view timelines for this time period
M/D	To display timelines for each day of the month after the start date.
M/DW	To display timelines for each week in the month after the start date.

A timeline is displayed for each item scheduled for the selected period. The Status of the timeline item can be one of the following: Active, Canceled, Completed, Planned, Sheduled. The following table shows the corresponding color indicator for each timeline Status.

Timeline Status	Color Indicator
Active	Green
Canceled	Red
Completed	Blue
Planned	Yellow
Scheduled	Orange

To display additional information for the item in the side pane, for example, start and end dates, use the scroll bars.

Associating Documents with Programs and Campaigns

Most marketing teams generate documents such as proposals, white papers, press releases, and artwork used in advertising. Use the following procedure to attach these documents to programs and campaigns for future reference.

To attach documents to programs and campaigns

1. Navigate to the Campaigns or Programs screen.
2. In the Programs or Campaigns list, click a program or campaign.
3. In the Plan link bar, click Documents.
4. Click the Attachments view tab.
5. To add a URL, in the Attachments list, perform the following steps:
    a. Click New URL.
    b. In the URL field, enter the URL, and click Add.

6. To attach a file, in the Attachments list, perform the following steps:
    a. Click New File.
    b. In the Choose File dialog box, select the file, and click Open.
7. In the Comments field, add information that identifies the file's contents.
8. (Optional) If you want changes to the original file to be included in the attached file, then select the Update File check box to set this preference.
9. To assess the attached document, click the Attachment Name in the Documents list to view document details.

Roadmap for Setting Up Campaigns

You use campaigns in Siebel Marketing and Siebel Campaigns. Prior to launching a campaign, you have to perform some or all of the following tasks:

- Create marketing segments and trees.

For information on this task, see Oracle Marketing Segmentation Guide.

- *Process of Creating and Modifying Offers*
- *Creating Campaigns*
- *Associating Offers and Segments with Campaigns*
- *Allocating Segments, Segment Trees, and Lists to Offer Treatments*
- *Associating Related Events with Campaigns*
- *Using SmartScripts with Campaigns*
- *Process of Setting Up Teams and Groups*
- *Process of Setting Up Campaign Execution Options*
- *Process of Setting Up Campaign Quotas*
- *Process of Setting Up Campaign Assignment Skills*
- *Associating Lists of Prospects or Contacts with Campaigns*
- *Adding Contacts and Prospects to Campaigns Individually*
- *Using Waves with Campaigns*
- *Previewing Lists*
- *Manually Generating Campaign Lists*

Creating Campaigns

Use the following procedure to create a campaign in the Campaigns screen.

This task is a step in *Roadmap for Setting Up Campaigns*.

To create a new campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, add a new record.
3. In the Campaigns form, complete the fields.

To display all fields in the Campaigns form, click the Show more button. The following table describes some of the fields.

Field	Comments
Approval Status	If the value is Revised, then the campaign is still being revised.
Assigned Budget	The amount of money approved to spend for the campaign.
Budget Request	If the campaign has been submitted as part of a Budget Request, then the Budget Request ID appears.
Campaign Code	Populated by Siebel Marketing. You can enter a source code for the campaign, or use the default record ID for the code. The source code for this campaign is available for use as part of the source code format for the program. The value must be unique.
Division	The internal division responsible for the campaign.
DNIS	The telephone number associated with the campaign. This number must be set up separately in Siebel CTI (Computer Telephony Integration). The DNIS field for a campaign is used in CTI to query for this campaign and drive a screen pop to this campaign. For more information, see *Siebel CTI Administration Guide* . Enter only numerals in this field. Do not use hyphens, spaces, parentheses, periods, or any characters other than numbers.
Execution Period	The predefined time period during which the campaign is active.
Language	The language in which the call script and offer was created. If no language is specified, then the selected SmartScript runs in the default language for the application. If the script does not have a translation for the language selected, then you get an error when you try to run the script.
Lead Partner	If a lead partner was assigned at the program level and the campaign associated with that program does not have a lead partner, then the campaign inherits the lead partner from the program. The choice of Lead Partner is limited to the organizations associated with the campaign. You can change the value, selecting from any of the partners associated with a campaign or campaign. This lead partner is copied to any campaigns created from this campaign and to responses or opportunities that result from this campaign.

Field	Comments
Name	The name of the campaign. You can have two campaigns with the same name but the campaign code for each campaign must be unique.
Organization	The predefined organization that is responsible for the campaign. You can choose more than one organization. You can also associate Partner Organizations with the campaign. Partner organizations are created and administered through Partner Administration. For more information, see Siebel Partner Relationship Management Administration Guide.
Planned Start/Planned End	The planned start date defaults to the date you created the campaign. The planned end date defaults to 30 days later. These dates do not affect launching campaigns. A campaign launches even if the planned end date has passed.
Priority	The priority level for the campaign. This value can be used to refine contact frequency rules in segmentation criteria. For example, to exclude customers who have been targeted by a Priority 1 campaign in the last 30 days.
Product Lines	You can associate product lines with the campaign to help categorize the campaigns.
Products	You can associate products with the campaign to help categorize the campaigns.
Program	This field populates when the campaign is associated with a specific marketing program.
Purpose	In the Plan view tab. The purpose of a campaign, for example: “To cross sell products to existing customers."
Region	Choose from the list the region in which the campaign is active.
SmartScript	Select a call script, if needed, to guide the agent’s interaction with the customer. To appear in the list, scripts must be set up in advance using Siebel SmartScript. For instructions, see Siebel SmartScript Administration Guide. The call script starts when an agent clicks the Script button in the Campaign Contacts or Prospects view. You can use the Call Guide as an alternative to a SmartScript call script.

Field	Comments
	If more than one script is associated with a campaign, then the script flagged as *primary* runs when the agent clicks the Script button.
Stage	This field is populated with stage information when the campaign is associated with a specific program's stage.
Status	By default, campaign status is Planned (start and end dates in the future). Status values can be changed at any time. During automatic program execution, the status changes to active when a campaign is loaded. At the conclusion of the program, the campaign's status changes to completed. If the program is executed manually, then the status does not automatically change. To change the status, use the status drop-down list to choose Active (start date in the past and end date in future) or Completed (start and end date in the past).
Type	Choose from the list the type of campaign you are creating. Options include Acquire, Retain, Win-Back, Cross-Sell, and Up-Sell.

Campaign Elements That Can Be Associated with Campaigns

The following table contains descriptions of many elements in the Campaign view tabs that can be associated with a campaign.

Plan and Design Element	Location and Description
Activity List	On the Schedule link bar. Team members can create and assign activities related to the campaign.
Activity Plans	On the Plan link bar. Templates of activities can be associated with a campaign. For more information, see *About Creating and Using Activity Plans*.
Documents	On the Plan link bar. Any team member can associate documents as attachments with the campaign.
Execution Options	On the Design link bar. The campaign execution options specify the default values for these settings each time the campaign is loaded.
Expenses	On the Plan link bar. Each campaign can have a forecast that predicts the financial performance of the plan. The actual results versus the forecast can be tracked for each campaign.
Lead Partner	Field in the Campaign Details form view. Anytime a Campaign Plan is loaded, the Lead Partner is added to the associated campaign. The lead partner must be one of the organizations associated with the campaign.
Offers	On the Design link bar. Each time the campaign is loaded or launched the associated offer is copied to the campaign. For more information, see *Associating Offers and Segments with Campaigns*.

Plan and Design Element	Location and Description
Organizations	Field in the Campaign Details form view. These are the organizations that have visibility to the campaign under All Campaigns. When the campaign is loaded, each organization is included on the associated campaign.
Related Events	On the Design link bar. After you launch a campaign that has an associated related event, campaign contacts are added to the campaign as invited attendees. For more information, see *Associating Related Events with Campaigns*.
Team Members	Field in the Campaign Details form view. These are the employee positions that have visibility to the campaign under the My Campaigns option. When the campaign is loaded, each team member is included on the associated campaign.

Associating Offers and Segments with Campaigns

Before you implement a marketing program, you can associate one or more offer treatments with the campaign, depending on your marketing strategy. The Offers list provides information about each offer, including the name and description, the offer type, and the source code assigned to this particular offer, and any associated product and price list.

When you load a campaign, Siebel Marketing creates a wave record, and copies the associated treatments to the wave history. Any views showing the treatments for each campaign have built-in visibility to prevent invalid treatments from appearing to end users. A *valid treatment* is a treatment with a current date that falls between its defined activation and expiration dates. If activation and expiration dates are not defined for the treatment, then the treatment is valid by default. When you load and launch a campaign, Siebel Marketing copies the campaign treatments to the wave history.

> **Note:** If you plan to change treatments during the campaign (after launching one or more waves), then do not disassociate the previous treatment. Instead mark the previous treatment as expired (using the expiration date), and associate the new active treatment. This method continues to capture and report on responses from the previous version of the treatment.

This task is a step in *Roadmap for Setting Up Campaigns*.

Associating Offers with a Campaign

The following procedure shows how to associate offers with a campaign.

To associate offers with a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Design view tab.
4. In the Offers list, create a new record.
5. In the Add Offer dialog box, select a predefined offer, and click OK.
6. In the Treatment list, click New.
7. Select one or more treatments for the offer or offers associated with the campaign, and click OK.

Associating A Segment with a Campaign

The following procedure shows how to associate a segment with a campaign.

To associate a segment with a campaign

1. In the Marketing Module, create a segment.
2. Navigate to Campaigns screen, then the Campaign List view.
3. Click the campaign Name.
4. Click the Design tab.
5. In the Design link bar, click Segments/Lists.
6. Click Add Segment to associate the segment.

   If the segment has never been used in a campaign previously, then click Choose a new segment, and select the segment from the folder location where you saved it.
7. To associate more segments, repeat Step 6.

Loading a Campaign with Associated Segments

The following procedure shows how to load a campaign with associated segments.

To load a campaign with associated segments

1. After the desired segments are associated, navigate to Campaigns screen, Campaign List, Design, and then the Allocation view.
2. In the Allocation view, allocate the segment or segments to your treatments.
3. From the Campaign Form menu, choose Load Campaign to associate the members of the segment with the campaign.
4. Pick a time and date for the load request, and then click OK.

Note: For more information, see *Allocating Segments, Segment Trees, and Lists to Offer Treatments*.

The following table describes how prospects and contacts can be used in segments associated with campaigns.

Scenario	Data Source	Integration Object	Comments
Segment contains only contacts	Siebel OLAP or Siebel OLTP	Marketing Contact	Fully supported. Contacts exist in the Siebel transactional database, so data is inserted only into the S_CAMP_CON table.
Segment contains only contacts	Non-Siebel database	Marketing Contact	Fully supported. New contacts and accounts (if mapped) are created in the Siebel transactional database.
Segment contains only prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON.
Segment contains only prospects	Non-Siebel database	Marketing Prospect	Fully supported. New prospects are created in the Siebel transactional database.

Scenario	Data Source	Integration Object	Comments
			Make sure that the Campaign Load List Format for the segment is configured to load data into the Marketing Prospect integration object.
Segment contains contacts and prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Contacts and prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON and S_DD_USER_KEY tables.
Segment contains contacts and prospects	Non-Siebel database	Not applicable	Currently not supported.

Allocating Segments, Segment Trees, and Lists to Offer Treatments

A single campaign can be used to target multiple segments and distribute multiple offer treatments. You can allocate segments, segment trees and internal lists to offer treatments within a single campaign using the Allocation view.

This task is a step in *Roadmap for Setting Up Campaigns*.

The following procedure shows how to allocate segments to offer treatments.

To allocate segments, segment trees, and lists to offer treatments

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign Name.
3. From the Campaign form, click the Design tab.
4. In the Design link bar, click Allocation.
5. Click Add Segment, Add Segment Tree, or Add List to add a predefined segment, segment tree, or list.

   > **Note:** If you select more than one treatment for the same segment or list, then the contacts or prospects are inserted into the campaign history one time for each treatment resulting in multiple entries.

6. In the dynamically added columns for each treatment, specify the percentage or absolute count of the target segment for the treatment.

   The following table describes some of the fields in the allocation applet.

Field	Comment
Control group %	Flag a control group for later analysis. This value is calculated on top of the counts in other treatment columns. For example, suppose you have a segment that includes a net count of 100, 000, an email treatment of 25,000, and a direct mail treatment of 40,000, with a control group of 20%. The control group of 13,000 contacts would be added to the campaign history table along with the 52,000 targeted contacts.

Field	Comment
% Allocation	Indicates that allocation is a percentage rather than an absolute count. If unchecked, then you must assign absolute values in the columns for each treatment.
Total Cost	The total cost of the treatment for the number of people targeted for the treatment row.

Associating Related Events with Campaigns

Events can be associated with a campaign so that you can invite contacts and prospects to an event. For more information about related events, see *Using Siebel Marketing with Siebel Events Management*.

This task is a step in *Roadmap for Setting Up Campaigns*.

The following procedure shows how to associate events with a campaign.

To associate events with a campaign

1. Navigate to the Campaigns screen.
2. In the Campaign list, click the campaign name.
3. Click the Design view tab.
4. In the Design link bar, click Related Events.
5. Create a new record, and click the Name select button.
6. In the Pick Event dialog box, select a predefined event, and click OK.

Using SmartScripts with Campaigns

A *SmartScript* is a script that the salesperson or call center agent uses to interact with the customer. It can be associated with any campaign.

If a SmartScript is associated with a business component and is run for a campaign, then that business component's name must be the same as the value in the Enable Follow-up Actions field for the campaign.

For example, if the Enable Follow-up Actions field is set to Create Responses, then the script's business component must be Response. If the Enable Follow-up Actions field is set to Create Opportunities, then the script's business component must be Opportunity.

A script based on the Opportunity business component can be run only when the value in Enable Follow-up Actions is either Create Opportunities or All. A script based on the Response business component can be run only when the value in Enable Follow-up Actions is either Create Responses or All.

If the value in the Enable Follow-up Actions field is All, then the SmartScript set as the primary script for the campaign is invoked. You can set the value of the Enable Follow-up Actions field by navigating to the Campaigns screen, Design, and then the Execution Options-Advanced view.

This task is a step in *Roadmap for Setting Up Campaigns*.

The following procedure shows how to set up a SmartScript.

To set up a SmartScript

1. Navigate to the Campaigns screen.
2. Select a campaign.
3. In the Campaign Details form, click the select button in the SmartScript field.

   The Smart Scripts dialog box appears.
4. Select the script from the list of available scripts, and click Add.

   Note: To add the remaining scripts used in this campaign, repeat Step 3 and Step 4.
5. In the SmartScript dialog box, select the check box of the primary script, and click OK.

Creating and Applying Campaign Templates

Using templates can save you time and effort. For example, many mailed campaigns use the same patterns of offers, such as an initial contact offer, a follow-up offer, and a thank-you or welcome offer. Email campaigns have a repeated pattern as well, starting with an initial offer, followed by confirmations for people opting in and opting out, followed by a welcome offer for new customers. By creating and using templates, you can save yourself time and effort and make your campaigns more consistent.

You can save any campaign as a reusable campaign template. The template retains many of the planning details from the campaign such as the goals, expenses, offers, documents, segments, lists, and activity plans. After you create a campaign template, you can reapply the template to any new campaigns. You can also share the template with other employees in your organization.

Saving a Campaign as a Campaign Template

The following procedure shows how to save a campaign as a campaign template.

To save a campaign as a campaign template

1. Navigate to the Campaigns screen.
2. In the Campaigns list, select a campaign to use as a template.
3. In the Campaign form, click the menu button, and choose Save as Template.

   This menu option is active only if your administrator has given you permission to use this action (using the Marketing access groups).
4. In the Save As Template dialog box, enter a name, and click OK.

Making Changes to a Template

The following procedure shows how to make changes to the new template.

To make changes to the new template

1. Navigate to the Marketing Templates screen, then the Campaign Templates view.
2. Query for the template you created in Step 4 of the previous procedure.
3. In the template list or form, make the necessary changes.

Applying a Campaign Template to a Campaign

The following procedure shows how to apply a campaign template to a campaign.

To apply a campaign template to a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, create a new campaign, or select a campaign to which to apply the template.
3. In the Campaign form, click the menu button, and choose Apply Template.
4. In the Apply Template dialog box, select a template to apply, and click OK.
5. When asked if you want to continue, click OK.

   The Message dialog box, appears, confirming that the template was applied.
6. In the Message dialog box, click OK.

Process of Setting Up Teams and Groups

Many organizations assign groups of agents to particular campaigns based on skill or territory.

The most direct way to provide access to the campaign is by assigning positions to a team. However, if you have a large call center where agents are organized by predefined groups of agents, then you can set up assignments one time and then assign the group to each campaign. Setting up campaign groups lets you add the key positions to a campaign group, without having to remember individual employees.

Some call centers do not have predefined groups, or the groups change often. In this case you can assign positions directly to the campaign team. Every employee position in the team has access to the campaign. To work with campaign teams and groups, perform the following tasks:

1. *Assigning Teams to Campaigns*. (Used by Siebel Marketing and Siebel Campaigns)
2. *Setting Up Campaign Groups*. (Used by Siebel Campaigns)
3. *Associating Groups with Campaigns*. (Used by Siebel Campaigns)

This process is a step in *Roadmap for Setting Up Campaigns*.

Assigning Teams to Campaigns

Campaign teams are used by Siebel Marketing and Siebel Campaigns. Campaign teams are set up by assigning individual employees to a team that is associated with the campaign. Each employee position on the campaign team has access to the campaign in the Campaigns screen.

If you are working with partners in developing the campaign, then you can also include a partner as a team member by adding that partner's position. The partner can then view the campaign in the Partner Portal, in the Campaign Management screen.

The following procedure shows how to assign a team to a campaign.

To assign a team to a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. In the Team field, click the select button.

The creator of the campaign is assigned as the primary member of the Campaign Team. This position can be removed from the team only after you select a different member of the team to be the Primary.

4. In the Team Members dialog box, select employees from the Available list, and click Add.

   To select multiple consecutive employees, hold down SHIFT as you select each name. To select multiple nonconsecutive employees, hold down CTRL as you select names.
5. Click the Primary field to select the primary team member, and click OK.

   The default primary team member is the position that created the campaign.

Setting Up Campaign Groups

Campaign groups are positions within your company, not individual employees. After you add a group to a campaign, anyone occupying a position listed in the group has access to the campaign. Campaign groups are used by Siebel Campaigns and can be associated with a campaign in Siebel Marketing.

The following procedure shows how to create a campaign group and add group members.

To create a campaign group and add group members

1. Navigate to the Campaigns screen.
2. In the Campaigns link bar, click Campaigns Groups.
3. In the Campaign Groups list, add a new record.
4. Enter a name and description for the group.
5. In the Campaign Groups list, select the group.
6. In the Positions list, add a new record.
7. In the Add Positions dialog box, select the positions for the group, and click OK.

Associating Groups with Campaigns

After you have created the campaign group, you can associate the group with your campaign. Campaign groups are used by Siebel Campaigns.

The following procedure shows how to add a group to a campaign.

To add a group to a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns link bar, click Campaigns Groups.
3. In the Groups list, create a new record.
4. Enter a name and description for the group.
5. In the Campaigns link bar, click Campaigns List.
6. Select the campaign.
7. In the Group field, click the select view button.
8. In the Add Groups dialog box, select the group from the available list, and click Add.
9. Click OK.

Process of Setting Up Campaign Execution Options

Campaign execution options are available in Siebel Marketing and Siebel Campaigns. Use the campaign execution options to specify campaign contact ownership and control the user's ability to edit campaign contacts and prospects. You specify the ownership type and complete the default owners (organization and position). In addition, you can apply assignment rule groups (optional) that perform owner assignment.

Campaign contact ownership is a feature to control team members' visibility into the campaign contacts. Team members accessing the Campaign Contacts view can display only those campaign contacts and prospects that they own.

You create these assignment rules in the Assignment Rules view in the Assignment Administration screen. For more information, see Siebel Assignment Manager Administration Guide. You select a rule group for a campaign in the Campaigns screen.

To establish execution options and apply Siebel Assignment Manager rules to campaign contacts, perform the following tasks:

1. *Setting Up Execution Options for Campaigns*
2. *Using Siebel Assignment Manager with Campaign Contacts*

This process is a step in *Roadmap for Setting Up Campaigns*.

Setting Up Execution Options for Campaigns

You can select the default execution options for each campaign when you set up the campaign. After the campaign is loaded, you can modify the execution options for the associated campaign at any time.

To assign contact ownership, make sure that you select the appropriate Campaign Contact Ownership value, your default owners, the Contact editing flags, and an Siebel Assignment Manager rule group.

The following procedure shows how to set execution options for a campaign.

To set execution options for a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click a campaign name.
3. Click the Design view tab.
4. In the Design link bar, click Execution Options or Execution Options - Advanced and complete the fields.

   > **Note:** Some fields exist only in the Execution Options - Advanced link. The Email Campaign fields exist only in the Execution options link.

   Execution options fields are described in the following tables:

- Assignment options. (See the following table.)
- Collaboration options. (See second table in this topic.)
- Delivery options. (See the third table in this topic.)
- Load options (See the fourth table in this topic.)

- Email campaign options (See the fifth table in this topic.)

The following table describes the assignment options for each Execution option field.

Field	Action
Assignment Rule Group	Required if you select Yes - Assignment Manager in the Campaign Member Ownership field. Use if you want Siebel Assignment Manager to assign the organization owner and position owner to contacts and prospects in the campaign. Select a rule group to apply to contacts in the campaign.
Campaign Member Ownership	Controls assignment of position owner and organization owner during the load process. Values are: • No. You do not want to assign ownership. When you select this option, the Organization Owner and Position Owner fields remain empty on the campaign contacts and prospect records. • Yes - Manually. When you select this option, the load process populates the Default Position Owner and Default Organization Owner to the Campaign History table (S_CAMP_CON) for the contacts and prospects in the load. After the load process, you can manually assign organization and position owners on the campaign contacts and prospect records. • Yes - Assignment Manager. You want Siebel Assignment Manager to assign ownership based on Siebel Assignment Manager rule groups. The load process invokes the Siebel Assignment Manager engine at the end of the process to assign the campaign members based on the rules in the selected Assignment Rule Group.
Default Organization Owner	(Optional) Default value that is populated into the Default Organization Owner field during the load process when assignment is enabled (Yes - Assignment Manager or Yes - Manually). The list of organizations is restricted to the organizations associated with the campaign. After the value is populated, it can be updated if the assignment engine reassigns names. For more information, see Siebel Assignment Manager Administration Guide.
Default Position Owner	(Optional) Default value that is populated into the Default Position Owner fields during the load process when assignment is enabled (Yes - Assignment Manager or Yes - Manually). The list of positions is restricted to the Default Organization Owner organizations associated with the campaign. After the value is populated, it can be updated if the assignment engine reassigns names. For more information, see Siebel Assignment Manager Administration Guide.
Lock Campaign Team Assignment	Campaign managers sometimes create assignment rules that assign additional positions to the campaign team. This lock flag excludes this campaign from the rules, so that new team members would not be assigned.

The following table describes the collaboration options for each Execution option field.

Field	Action
Enable Contact Editing	Default is on (True). Clear the check box to prevent anyone from changing the owner fields and adding and deleting contacts. This flag controls the ability to edit the following fields on the campaign contact or prospect record: • Contact Last Name • Done Flag • Organization Owner

Field	Action
	• Prospect Last Name • Position Owner In addition, when this value is True, the New and Delete buttons are available. **Note:** A contact can only be deleted by the Position Owner to whom it is assigned. The Delete button is unavailable to other users.
Enable Partner Editing of Contacts	Default is on (True). Clear the check box to prevent partners from editing the fields and using the buttons controlled by the Enable Contact Editing check box.
Enable Followup Actions	This value controls which buttons (Create Oppty, Create Order, Create Response, Script) are active in the Campaign agent views (Campaign Members). The following list describes the values: • Create Opportunities. The Create Response and Create Oppty buttons are active. • Create Orders. The Create Response and Create Order buttons are active. • Create Responses. The Create Responses button is active. • All. All buttons are active.
Enforce Approvals	When this option is active, the campaign cannot be launched unless the Approval Status for the campaign and its associated offers is Approved. You receive an error if you try to launch a campaign and the conditions are not met.
Control Campaign	This flag denotes that this campaign is meant to be used as a control group for a test and control program. Control campaigns are hidden from the outbound call center agent views (Campaign Members - Outbound), because control groups do not receive offer messages. Control Campaigns do appear in the Inbound version the Campaign Members view, because you want to be able to capture unsolicited responses.

The following describes the delivery options for each Execution option field.

Field	Action
Route Contacts	This flag controls whether or not campaign contacts are routed to mobile clients. By default all routing rules for campaign contacts are disabled.
Use Pregenerated Files	When this option is checked, the launch option uses the most recent list export file for the wave being launched. This option is useful if you have a short time to deliver all of your email, and you want to regenerate the list file before you launch the campaign. To generate an email list file or a list export file for other channels, navigate to the Campaigns screen, Execute, and then the List Distribution view.
Route Prospects	This flag controls whether campaign prospects are routed to mobile clients. By default all routing rules for campaign prospects are disabled.

The following table describes the load options for each Execution option field.

Field	Action
Load Behavior	Controls what happens to the previous wave or load when the user opts to load the campaign again. The following is a list of choices: • Overwrite Campaign History. Purges entire existing campaign history and creates a new load. • Create New Wave. Creates an additional load or wave for the latest load. • Add to Existing Wave. Finds the most recent good wave (not purged or suspended) and adds the campaign load members to the existing wave.
Allow Repeated Contacts with Load	Controls whether a specific contact or prospect ID can appear more than one time in the same load in the campaign for the same treatment. The unique index in S_CAMP_CON (campaign members or contacts table) is based on Campaign ID, Load Number, Contact/Prospect ID, Token Number and Treatment ID. By default the application always populates a value of 1 in the column, so that uniqueness is driven by the contact and campaign. However, if you turn off this option, then the token number becomes a running number so there is no uniqueness enforced at the table level. This scenario is typical in certain industries such as Life Sciences where there is a many-to-many relationship between contacts and accounts. For example, in the pharmaceutical industry, doctors are affiliated with multiple hospitals and the pharmaceutical companies send offers to all of their active addresses in the same campaign.
Source Code Format	The source code format to be used to generate source codes for the campaign. If the format is also associated with the program level, then the value is carried over when a campaign is created on the program flow.
Generate Source Codes during Load	Generates source codes for waves that have not been launched at the completion of the campaign load. If the option is disabled, then you must manually generate the source codes using the Generate Source Codes menu option in the campaign screen.
Capacity Limit per Load	If this value is set to a value greater than 0 (zero), then the campaign load stops inserting campaign members as soon as the capacity is reached. For example, you could limit the campaign size to no more than 1000 people for each load.
Max Errors	This setting controls when the campaign load (EAI) process aborts. The load process tabulates the number of rejected records that were not inserted due to errors (bad data and so on). After the Max Errors value is passed, the campaign load process aborts. When this value is 0 (zero), all inserts and updates for the batch are backed out.
Pre-Load Task	A workflow can be associated that executes prior to Campaign Load. This can be used to execute dependent segments, create associated saved result sets, or call a third-party engine to modify existing data prior to segment execution. Available workflows in the picklist are drawn from a workflow group called Marketing Custom Workflows. You can customize these workflows to add your own validation or business logic.
Post-Load Task	If you are manually executing a campaign, then you can create a post-load task that executes a custom workflow immediately after loading the campaign if, for example, you want to employ an optimization engine to optimize the loaded target audience for the launch process. Available workflows in the picklist are drawn from a workflow group called Marketing Custom Workflows. You can customize these workflows to add your own validation or business logic. If a campaign is scheduled to execute automatically, then you cannot run post-load tasks.
Post-launch Task	A workflow can be executed immediately after launching a campaign. This can be used to allow a custom process to transpose the final data set before the vendor picks up the file. Available workflows

Field	Action
	in the picklist are drawn from a workflow group called Marketing Custom Workflows. You can customize these workflows to add your own validation or business logic.

The following table describes the execution options for email campaigns.

Field	Action
Save and Send	For email campaigns, this flag controls whether or not a copy of each email sent to a campaign contact as part of the campaign is saved to a file. If you select the Save and Send option, then a copy of each email is saved as a .txt file and is assigned a name, using the format SEMA-CR-*recipient_id*_email.txt, where *recipient_id* is the contact Id. By default, copies of emails sent to contacts as part of a campaign are not saved.
Destination Directory	If you select the Save and Send option, then enter the full path to the directory where you want to save copies of the emails sent to campaign contacts, for example, `D:\esd`. The Email Sending Daemon creates a unique subdirectory within the directory you specify that contains all the emails sent for an individual campaign, and it assigns a name to the subdirectory by combining the campaign task Id and Wave Id with the time the email-send request was submitted (in nanoseconds). For example: `D:\esd\42-7XA4D_42-7XBJ9_512151790974819`

Note: To use the Save and Send functionality, you must install Email Marketing Server build 8.1.1.2 [610] - EMS[625] or later. Email Marketing Server can be downloaded from My Oracle Support.

Using Siebel Assignment Manager with Campaign Contacts

After setting execution options, you can load and launch the campaign. If you chose to automatically assign an owner and associate an assignment rule group with the campaign, then Siebel Assignment Manager runs against the contacts in S_CAMP_CON at the end of the campaign loading process.

Before launching a campaign, you can add or delete campaign contacts and prospects or change the organization and position owners associated with a contact or prospect.

When this editing process is complete, you can run Siebel Assignment Manager against the campaign contacts and prospects to make sure ownership and visibility are correct.

Running Siebel Assignment Manager

The following procedure describes how to run Siebel Assignment Manager.

To run Siebel Assignment Manager

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click a campaign name.
3. Click the Design view tab.
4. In the Design link bar, click the Execution Options view tab.
5. Click the Run Assignment Manager button.
6. Select a campaign.

   Siebel Assignment Manager runs using the campaign history table (S_CAMP_CON) for that campaign's contacts and prospects. For example, partners or employees might add new contacts to the campaign during the review process. Because these new leads might not have the correct owner, you can rerun Siebel Assignment Manager to assign these new records.

Note: You cannot run Siebel Assignment Manager until the campaign has successfully loaded.

Automatically Assigning Owners to Campaign Contacts

The following procedure shows how to automatically assign owners to campaign contacts.

To automatically assign owners to campaign contacts

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design view tab.
4. In the Design link bar, click Execution Options.
5. Verify that the values in the following fields are correct:
   - Default Organization Owner
   - Default Position Owner
   - Assignment Rule Group
6. Load and Launch the campaign.

   When the Campaign is loaded, Siebel Assignment Manager assigns owners to the campaign contacts.
7. To run Siebel Assignment Manager again, click the Run Assignment Manager button and select a campaign to load and launch.
8. Click Run Assignment Manager.

   The Run Assignment Manager button is only available if you choose Yes - Assignment Manager in the Campaign Contact Ownership field.
9. In the Pick Campaign dialog box, select a campaign, and click OK.

Process of Setting Up Campaign Quotas

Quotas are used by Siebel Marketing and Siebel Campaigns and can be set up for a campaign as an incentive for agents to meet target goals. A *quota* is a goal, such as a monetary goal for generating a certain amount of revenue for a campaign, or it might be a nonmonetary goal such as making a certain number of calls within a time period.

To develop a quota plan with measurable objectives and rewards for success, use the following process and the quota view tabs to define details. To set up campaign quotas, perform the following tasks:

1. *Creating Campaign Quota Plans*
2. *Defining Quotas for the Plan*
3. *Assigning Awards to the Campaign Quota Objective*
4. *Assigning Campaign Quota Plan Participants*

This process is a step in *Roadmap for Setting Up Campaigns*.

Creating Campaign Quota Plans

Use the following procedure to set up a quota plan for your campaign.

To create a quota plan

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design view tab.
4. In the Design link bar, click Quotas.
5. In the Quotas list, create a new record.
6. Complete the fields for the quota plan.

   The following table describes some of the fields.

Field	Comment
Active Flag	Set to True when you create the quota.
Description	Description of the quota plan.
End	Populated when the Period field is completed.
Internal Division Name	The name of the internal division associated with this quota.
Period	(Required) The time period for which the quota is active.
Plan Name	(Required) Enter a relevant name for the Quota Plan.
Start	Populated when the Period field is completed.

Defining Quotas for the Plan

After you define the quota plan, add quota objectives that participants must meet to receive incentives. Before adding new quotas, add the appropriate Quotas, Awards, and Plan Participants.

Adding Quota Objectives to the Quote Plan

The following procedure describes how to add quote objectives to a quote plan.

To add quota objectives to the quota plan

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Quotas.
5. In the Quotas list, click the plan name.
   The quota plan details appear in the Plan form, and quota objectives appear in the Quotas list.
6. In the Quotas list, create a new record.
7. In the Add Quota Objectives dialog box, select an objective, and click OK.
   Repeat Step 6 and Step 7 to add additional quota objectives to the quota plan.

Editing Quota Objective Values

The following procedure shows how to edit quota objective values.

To edit quota objective values

1. Navigate to the Campaigns screen.
2. In the Campaign list, click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Quotas.
5. In the Quotas list, click the plan name.
   The quota plan details appear in the form, and quota objectives appear in the Quotas list.
6. Select the quota objective record and change values in the appropriate fields.
   Information about some fields in the quota objective record is described in the following table.

Field	Comment
Description	Contains a detailed summary of the quota objective. You can edit this field.
Measure	(Read only) Values are Revenue and Units. You typically add a Target Amount quota for a revenue measure and a Target Quantity quota for a units measure.
Quota Type	(Read only) Values are Amount and Quantity.

The next time you select the quota record, your modifications appear.

Assigning Awards to the Campaign Quota Objective

Quota plan participants might receive awards for meeting campaign objective goals. A number of awards for different performance achievements can be set up using the Awards view tab list.

Assigning Awards to Quota Objectives

Use the following procedure to assign awards to quota objectives.

To assign predefined awards to a quota objective

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Quotas.
5. In the Quotas list, click the plan name.

   The quota plan details are displayed in the form, and quota objectives appear in the Quotas list.
6. Click the Award select button and, in the Pick Quota Incentive dialog box, select the award for meeting the quota.

   After you click OK, the selection appears in the Award field.
7. In the Target Quantity field, click the calculator button, and use the calculator to enter the number of units that represents the quota target.

Creating New Awards

The following procedure shows how to create new awards.

To create new awards

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Quotas.
5. In the Quotas list, click the plan name.

   The quota plan details are displayed in the form, and quota objectives appear in the Quotas list.
6. In the Administration - Sales Quota link bar, click Awards.
7. In the Awards list, create a new record.
8. Complete the necessary fields for the award.

   Some fields are described in the following table.

Field	Comment
Amount	In the field, click the arrow, and use the calculator controls to enter the dollar amount for the award. If the type is cash, then this value is the amount of cash given with the award.

Field	Comment
Award Date	In the field, click the arrow, and use the calendar controls to specify the date the reward is given.
Description	Enter a description of the award.
Name	Enter a reference name for the award.
Type	Select the award type from the drop-down list. Options are Dinner, Cash, Trip, and Other. Your administrator can change these values to reflect your company's requirements.

Assigning Campaign Quota Plan Participants

Use the following procedure to assign eligible participants to your quota plan using the Participants view tab.

To add participants to the campaign quota plan

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Quotas.
5. In the Quotas list, click the plan name.

   Quota objectives appear in the Quotas list.
6. Click the Quota Plan Participants view tab.
7. In the Participants list, create a new record.
8. In the Participants list, create a new record, and complete the fields.

   This field updates if you change the participant's start or end date. You can also edit the Prorate field directly. For each plan participant, quotas are calculated by multiplying the prorate by the target amount or quantity.

   For example:

   Prorate=((Participant's End Date – Participant's Start Date) + 1) / ((Period End Date – Period Start Date) + 1)

Repeat this procedure to add other participants.

Process of Setting Up Campaign Assignment Skills

Campaign assignment skills are set up only in Siebel Campaigns. Setting up campaign assignment skills is a way to identify which employees have certain skills and define the attributes of each skill.

Siebel Assignment Manager uses assignment skill rules to assign telesales agents to a campaign. Assignment skills are categories, such as Product or Language. Campaign Skill Items are subsets of campaign skills. For example, a skill item for the product campaign skill might be 486 Laptop or Pentium Desktop. A skill item for the language campaign skill might be French or English.

When associating skills with a campaign, first define the assignment skill, and then assign properties to the skill using the Campaign Skill Item list. Fields in the Campaign Skill Item list vary according to the skill. Repeat these procedures to add as many skills as needed to the campaign.

To set up assignment skills for a campaign, perform the following tasks:

1. *Associating Assignment Skills with Campaigns*
2. (Optional) *Defining Campaign Skill Items*
3. (Optional) *Deleting Assignment Skills and Campaign Skill Items*

This process is a step in *Roadmap for Setting Up Campaigns*.

Associating Assignment Skills with Campaigns

Use the following procedure to define and associate assignment skills required for your campaign.

To associate multiple assignment skills with a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Assignment Skills.
5. In the Assignment Skills list, create a new record.
6. Complete the fields, typing comments that describe the skill and how it is used in the campaign.

Defining Campaign Skill Items

Use the following procedure to define items for each campaign skill associated with your campaign.

To associate skill items with a skill

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Assignment Skills.
5. In the Assignment Skills list, select a skill.
6. Navigate to the Campaign Skill Item list, and create a new record.
7. In the Campaign Skill Item list, complete the fields defining the properties for each skill item.

Deleting Assignment Skills and Campaign Skill Items

You can delete assignment skills and campaign skill items by using the following procedures. When you delete an assignment skill, its campaign skill items are deleted.

Deleting an Assignment Skill and its Campaign Skill Items

The following procedure describes how to delete an assignment skill and associated campaign skill items.

To delete an assignment skill and its campaign skill items

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Assignment Skills.
5. In the Assignment Skills list, select the skill, and delete the record.

   You have deleted the assignment skill and the campaign skill items that were associated with it.

Deleting a Campaign Skill Item

The following procedure shows how to delete a campaign skill item.

To delete a campaign skill item

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design tab.
4. In the Design link bar, click Assignment Skills.
5. In the Assignment Skills list, select the skill.
6. Navigate to the Campaign Skill Item list, and select an item to delete from the assignment skill.
7. Delete the skill record.

Using Siebel Marketing with Siebel Events Management

Sales and marketing professionals can use the Siebel Events Management module to create, coordinate, and manage events for the enterprise, resulting in improved client interaction and expansion of the marketing message.

Siebel Events Manager is integrated with Siebel Marketing, so you can create complex, multistage event marketing programs. Marketing administrators can use the Program Flow view to associate events with marketing campaigns. Upon execution of the campaign, attendees are invited to the event and populated in the event attendee list. Siebel Marketing tracks responses when the attendees decide to accept the invitation and begin the registration process. As a result, event managers can track each attendee through the life of the event, from invitation, to confirmation, and to attendance.

Customers who have purchased the required license options for both Siebel Marketing and Siebel Events Management, can invite contacts or prospects to an event through an email marketing campaign. Sending this kind of invitation involves creating a target segment or list of invites, associating a related event to a campaign and email offer, and launching the campaign to send out email invitations with an embedded Event Web site URL. During execution, campaigns that have a related event automatically add the campaign contacts or prospects to the event as attendees, with a Registration Status of Invited.

Unlike contacts, prospects are not required to log in to the events Web site to register for an event. Therefore, this method for inviting prospects can be particularly useful in the case where third-party prospect lists are imported and not promoted to contacts. Invited prospects appear in the Events screen, Attendees subview.

Promoting an Event Using a Campaign

This task assumes that you have already created an Event and Offer. In most cases, you would invite contacts or prospects by using an email offer. Siebel Marketing also supports other types of offers, such as Direct Mail, Fax, or SMS. However, the automatic embedding of the Siebel Events Web site URL only works with an email offer.

The following procedure shows how to promote an event using a campaign.

To promote an event using a campaign

1. Create a campaign and add a Related Event.
   For more information, see *Creating Campaigns* and *Associating Related Events with Campaigns*.
2. Launch the campaign.
   For more information, see *Launching Programs and Campaigns*.
3. To display the invited contacts or prospects after the campaign launch, navigate to the Events screen, Participants, then the Attendees view tab.

Promoting an Event Using a Program

This task assumes that you have already created the events, campaigns and offers and that these entities are associated (such as associating an offer to a campaign and an event to a campaign). In most cases, users invite contacts or prospects using an email offer. Siebel Marketing also supports other types of offers, such as Direct Mail, Fax, or SMS. However, the automatic embedding of the Siebel Events Web site URL only works with an email offer.

The following procedure shows how to promote an event using a program.

To promote an event using a program

1. Create a program.
   For more information, see *Creating Programs*.
2. Navigate to the Programs screen, and click the program name.
3. In the Program Flow workspace, select the campaign used to promote the event.
4. In the Objects palette, click to select the event icon and move it to the program flow workspace.
5. Select the event from the Pick Event dialog box.
6. Launch or schedule the program as you normally would.
   For more information, see *Executing Programs*.
7. After each campaign launch, display the invited contacts or prospects by navigating to the Events screen, Participants, then the Attendees view tab.

Testing Campaigns

You can test outbound email and fax campaigns in Siebel Marketing and Siebel Campaigns before actually sending them to target recipients. You can preview the offer delivery distribution and then launch the email campaign using the Send functionality.

When you use the test offer feature, a sample of the offer is sent to you. To test campaigns and offers, see the following topics:

- *Scenario for Testing Campaigns*
- *Testing Campaigns That Have Email and Fax Treatments*

Scenario for Testing Campaigns

The marketing manager of a telecommunications company plans to roll out a campaign that targets mobile communications customers whose service agreements expire in the next quarter. The campaign features an email containing information on the latest offers. The business goal is to retain the accounts of those customers by offering incentives for signing a new service agreement.

The marketing manager uses Test Offer to view the content and format of the email before it is sent to targeted customers.

Testing Campaigns That Have Email and Fax Treatments

Test Treatment sends you samples of email or fax treatments associated with a particular campaign. Before testing email treatments, make sure you complete the following tasks:

- **Make sure the treatment is active.** The date in the Activation Date field for the email treatment must have arrived, and the date in the Expiration Date field must be current or in the future for the Test Treatment command to be enabled.
- **Associate the treatment with a campaign.** Associate the treatment with an active campaign. For more information, see *Associating Offers and Segments with Campaigns*.

The following procedure shows how to test email and fax campaign treatments.

To test email and fax campaign treatments

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Design view tab.
4. In the Design link bar, click Offers.
5. In the Treatments list, select an email treatment.
6. Click the Edit Email tab and manually enter the required information for the values in the merge fields.
7. Click the Treatment Details tab.
8. Click the menu button, and choose Test Treatment.
9. For email treatments, choose a merge field from the Merge Fields list.
10. For fax treatments, choose from the list of available team members in the Campaign Team dialog box.
11. Verify the email treatment has been sent to the specified email address.

Using Seed Lists for Testing Email Treatments

A seed list is an internal list that contains prospects or contact records. You can use a seed list of email accounts to test both HTML and text versions of an email. For example, the contacts or prospects in a seed list could have email accounts with several ISPs to allow testing for deliverability to each ISP. To create a seed list, navigate to the List

Management screen, then the Lists view and add a new list with Seed List as the List Type. For more information on list management, see *Managing Lists*.

About Using Response Management

Siebel Marketing and Siebel Campaigns use Response Management. Whenever prospects or contacts respond to an offer through any channel (by inbound email, the Web, a call center, or sales representative), their responses can be captured in detail using the Responses screen. Using Response views, you can determine which contacts to pursue as opportunities.

Campaign media can be different from response media. Recipients of an Internet campaign can respond through a call center, and recipients of a direct mail offer might respond by going to a Web offer URL. A Web site can capture response details, while phone calls or direct mail responses must be recorded manually.

> **Note:** In Siebel Marketing, inbound email replies are not automatically captured as responses. You must configure your email response product to support inbound email processing. For Siebel Email Response set-up instructions, see Siebel Email Administration Guide.

There are several response types and 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.

To use Response Management, you might perform some or all the following optional tasks:

- *Adding Response Information to Prospect or Contact Records*
- *Using Automatic Source Code and Treatment Code Lookups*
- *Adding Products to Responses*
- *Adding Orders to Responses*
- *Adding Opportunities to Responses*
- *Adding Attachments to Responses*
- *Response Types*
- *Promoting Responses to Opportunities*
- *Creating Automatic Responses from Opportunities and Orders*

About Response Definitions

The Response definitions view shows all the response definitions within the current program. It provides a consolidated view of trees and segments associated with the responses. To access the view, navigate to Program screen, Design, and then the Response Definitions view, or double click on a Responses shape in the Program Designer flow, as described in *Adding Responses to Programs*.

> **Note:** Deleting a Response definition in the Response definitions view also deletes the shape from the Program Flow designer view.

The following table describes some of the fields in the Response Definitions applet.

Field	Comment
Stage Name	Name of the stage associated with the response. Clicking this field navigates to the Program screen, Schedule, then the Details View, which displays the stage details, including its schedule.
Stage Status	The default is the record identifier for the stage. Change the identifier for the stage source code if desired, but make sure the value is unique.
Name	Name of the response definition.
Folder Location	Folder location where the response definition is to be saved.
Max Errors	If the response generation process exceeds this number of errors, then the entire process is aborted.

The following table describes some of the fields in the Response Values list applet.

Field	Comment
Priority	Priority of the Tree Node.
Net Count	The most recent Net count retrieved from the segmentation engine.
Create Response	A response will only be created if this box is checked. It is checked by default.
Treatment	(Optional) A pick applet to associate a treatment with the inferred response. This field is used to track and report effectiveness of treatments. Constrained to campaigns in the program.
Campaign	(Optional) A pick applet to associate a campaign with the inferred response. This field is added only for richer reporting. Constrained to campaigns in the program.
Description	Description of the response.
Response Type	Each response stream can capture responses in a specified LOV category. For more information on response types, see *Response Types*.
Score	Numeric
Cost	Currency
Value	High, Low, or Medium.

Adding Response Information to Prospect or Contact Records

The All Responses list displays responses to selected campaigns and offers. Use this view to add response information to existing prospect or contact records, to promote a contact to an opportunity, to specify the response type and channel, and to score the response. Use an optional Details form to enter more information about the response.

The following procedure shows how to add response information to prospect or contact records.

To add response information to prospect or contact records

1. Navigate to the Responses screen.
2. In the Responses list, create a new record.
3. In the Responses list or form, complete the fields, using the following table as a guide.

Fields	Comment
Last Name	Select the Last Name for a prospect or contact. Some fields are populated based on this selection. These include: o The first name of the respondent. o The account associated with the respondent. If no account is associated, then use the Account select button to choose one. o The account address (city, state, country, telephone number, and so on), that are associated with the respondent are automatically filled in the form.
Lead Partner	Choose a partner organization to associate with the response. If a lead partner was assigned at the program level or campaign level, then that partner appears in this field. If you do choose to change the Lead Partner value, then the drop-down list shows only those partners associated with the campaign source.
Response Method	(Optional) The method used to capture the response.
Campaign Name	(Optional) Choose which campaign the customer is responding to. If the customer is not responding to a specific campaign, then you can select only the treatment.
Treatment Name	(Required) Only treatments associated with the selected campaign appear in the list.
Score	Enter a numeric value that represents a score for the response.
Source Code	In Siebel Marketing and Siebel Campaigns, source codes are assigned to each campaign contact according to the source code format associated with the program stage. If the source code is included in offer materials, then it can be accessed by the recipients in their responses.

Fields	Comment
Treatment Code	Each treatment has an unique treatment code. If the treatment code is included in the offer materials, then it can be accessed by the recipients in their responses.

Using Automatic Source Code and Treatment Code Lookups

Behind each Responses view is an automatic business service that looks up and decodes information based on any source codes or treatment codes added in a response.

Source Code Lookups

To perform a source code lookup, enter the campaign contact's source code into the Source Code field on the response form and leave the field. You do not have to save the record to perform the lookup. As soon as you click or step off the field, the lookup service determines whether the campaign is recognized and whether the contact name can be uniquely determined. If the source code is recognized, then the correct campaign name is defaulted. If the contact name can be uniquely determined within a campaign, then the contact name is also defaulted. The source code value is stored in the campaign history table (S_CAMP_CON) for each contact record.

Treatment Code Lookups

To perform an treatment code lookup, enter the treatment code in the response form. When you save the record, if the lookup service recognizes the treatment code, then it defaults the correct treatment name.

Note: If the source code or the treatment code is not recognized by the application or if the two codes conflict, then neither values is saved and the response record is not committed to the database.

If your deployment does not require source code lookups, then you can disable the Response Lookup business service using Siebel Tools.

Adding Products to Responses

This view tab displays a list of products associated with the response, for example, products for which a respondent requested information using a product link in an email or Web treatment.

The following procedure shows how to add products to a response.

To add products to a response

1. Navigate to the Responses screen, then the Responses view.
2. In the Responses list, click the description.
3. Click the Products view tab.
4. In the Products list, create a new record.
5. In the Add Products dialog box, select the product from the list, and click Add.

   The list contains products that have been associated with the treatment.

Adding Orders to Responses

This view tab displays a list of the respondent's product orders. An order record contains information on the order status, the order number, type, account associated with the order, the date, priority, and description of the order.

The following procedure shows how to add orders to a response.

To add orders to a response

1. Navigate to the Responses screen, then the Responses view.
2. In the Responses list, click the description.
3. Click the Orders view tab.
4. In the Orders list, create a new record.
5. In the Add Orders dialog box, select the order from the list, and click Add.

Adding Opportunities to Responses

This view tab displays a list of opportunities associated with the response.

The following procedure shows how to add opportunities to a response.

To add opportunities to a response

1. Navigate to the Responses screen, then the Responses view.
2. In the Responses list, click the description.
3. Click the Opportunities view tab.
4. In the Opportunities list, create a new record.
5. In the Add Opportunities dialog box, select the opportunity from the list, and click Add.

Adding Attachments to Responses

This view tab displays a list of documents and other items that are associated with the response record.

The following procedure shows how to add attachments to a response.

To add attachments to a response

1. Navigate to the Responses screen.
2. In the Responses list, click the description.
3. Click the Attachments view tab.
4. To add a URL, in the Attachments list, perform the following steps:
    a. Click New URL.
    b. In the URL field, enter the URL, and click Add.
5. To attach a file, in the Attachments list, perform the following steps:
    a. Click New File.

b. In the Choose File dialog box, select the file, and click Open.

Response Types

The information captured and stored in the Response Details view depends on the response type that you select in the Response Type field of the response record. For each response type value, The following table identifies some of the field names in which information is captured and describes the captured information.

Note: A Response is not automatically created when you click a Related Events link in an email or Web treatment. Siebel Marketing and Siebel Campaigns do not provide responses for Clicked on Related Event.

Response Type	Field Name	Captured Information and Description
Accepted Invitation	Summary	Indicates user accepted invitation.
Attended	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect attended the event.
Cancelled	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect canceled.
Clicked on event URL	Description	Contains Event Name. Indicated that the contact or prospect clicked on the URL in the invitation email.
Clicked on Product URL	Summary	Name of the product. The list of product URLs the respondent clicked appears in the Responses screen, Products view.
Clicked on Web Treatment	Summary	Name of the Web treatment that the treatment recipient clicked.
Completed Web Survey	Summary	Name of the Web survey that the treatment recipient clicked.
Confirm Subscribe to List	Summary	Indicates that the user's request to subscribe has been processed. An email is sent to confirm this status.
Confirm Unsubscribe to List	Summary	Indicates that the user's request to unsubscribe has been processed. An email is sent to confirm this status.
Confirmed	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect confirmed his or her attendance.
Declined Engagement	Description	Indicates that the user declined participation in the topic.
Declined Invitation	Summary	Indicates that the user declined the invitation.

Response Type	Field Name	Captured Information and Description
Downloaded Info/ File(s)	Downloaded File	Name of the downloaded file.
	Subject	Subject of the file.
	Summary	Optional comment.
Forward to a Friend	Comment	Allows user to include personal note to friend who is receiving the forwarded message.
	Email Address	Input area for Email address of friend who is receiving the message.
	First Name	Input area for First Name of the friend who is receiving the message.
	Last Name	Input area for Last Name of the friend who is receiving the message.
Gave Referral	Summary	Indicates user provided a referral.
Invited	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect was invited.
No Interest	Summary	Indicates the user was not interested in topic.
No-Show	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect did not arrive at the event.
One Click Unsub	Summary	Indicates that the user's request to unsubscribe has been processed.
Pending	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect is currently in the process of registering.
Read Receipt	Not applicable	An optional response type that requires additional configuration to support automatic creation. Marketers can embed an HTML tag in HTML emails that Siebel Marketing can use to count each time the email is opened (read). The read receipt tag contains an image request. When that image is requested it is interpreted as an opened email. The tag must be placed on its own line at the end of the message.
Rejected	Not applicable	Not applicable.
Requested Unsubscribe Response	Subject	Can store the subject line of an inbound email or be edited manually.
	Summary	Contents of the email. Applies only to campaign responses.

Response Type	Field Name	Captured Information and Description
	Time of Day (Subscribe by phone)	Indicates the respondent's preference for a time if the respondent wants to subscribe by telephone. Choices are Morning, Afternoon, and Evening.
Requested call back	Phone #	Respondent's phone number.
	Priority	Priority level of the callback request. Choices are Urgent, High, Medium, and Low.
	Summary	Stores the comments for a Web-generated response or can be edited manually.
	Time of day	Indicates the respondent's preference for the time of callback. Choices are Morning, Afternoon, and Evening.
	Topic	Can store the subject line of an inbound email or be edited manually. The list of products for which the respondent requested a callback appears in the Responses screen, Products list.
Requested Further Engagement	Description	Indicates that the user has requested further discussion.
Requested more info	Comments	Stores the comments for a Web-generated response. Other comments can be entered manually.
Requested more info	Email	Email address, if the delivery method is email.
Requested more info	Fax	Fax number, if the delivery method is fax.
Requested more info	Phone	Phone number, if the delivery method is phone.
Requested more info	Ship Method	The preferred method of delivery (direct mail, email, fax, or phone) that the customer has specified be used for delivery of information.
Requested more info	Street Address, City, State, ZIP, Country	The address to which the information is mailed if the preferred delivery method is direct mail. The list of products for which the respondent requested information appears in the Responses screen, Products list.
Requested more info	Topic	Can store the subject line of an inbound email or be edited manually.
Requested Unsubscribe	Email, Fax, Phone, Direct Mail	The choices are subscribe and unsubscribe.
Respondent Interested	Description	Indicates that the responder has shown interest in topic.

Response Type	Field Name	Captured Information and Description
Respondent Purchased	Not applicable	This response is not created automatically. You must use Siebel Business Process Designer to capture responses of this type. The orders for this purchase are displayed in the Responses screen's Orders view.
Respondent unreachable	Summary	Optional comment.
Response created opportunity	Summary	The list of opportunities can be accessed by selecting the Responses Opportunities view.
Submitted Source Code	Not applicable	Not applicable.
Subscribe to List	Summary	Indicates that the user's request to subscribe has been processed.
Unclassified Response	Not applicable	The response does not fall into one of the main response type categories or is a campaign response that requires manual processing.
	Subject	Subject of the email. Applies only to campaign responses.
	Summary	Contents of the email. Applies only to campaign responses.
Unsubscribe to List	Summary	Indicates that the user's request to unsubscribe has been processed.
Waitlisted	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect has been waitlisted due to exceeded capacity.
Walk-in	Description	Contains Attendee Status and Event Name. Indicates that the contact or prospect arrived at the event without registration.

Promoting Responses to Opportunities

If the customer is interested in the product offered by the campaign, then you can promote the response to an opportunity. If the customer is an existing contact, then the account is associated with the opportunity. If the customer is a prospect, then the customer is promoted to a contact, and then associated with an account.

The following procedure shows how to promote a response to an opportunity.

To promote a response to an opportunity

1. Navigate to the Responses screen.
2. In the Responses list, click the Description name.

3. In the Response form, click Create Opportunity button.

   The Opportunity form appears, with the response information in the form, and the contact information in the Campaign Leads Contacts list.

Creating Automatic Responses from Opportunities and Orders

When you create an opportunity in the All Contacts/Prospects view using the Create Opty button, Siebel Marketing and Siebel Campaigns create a response record using the Create Auto Response business service.

For opportunities, the response is created for each contact added to an opportunity after a campaign is associated as an opportunity source. To create the response, associate a campaign with the opportunity using the Source field MVG (multivalue group) and then add a contact to the opportunity. All responses default to a type of Created Opportunity.

For orders, the response is created whenever a campaign is associated with a sales order. To create the response, you associate a campaign with the Sales Order using the Campaign field. All responses default to a Type of Respondent Purchased.

Associating an Opportunity with a Campaign

To associate an opportunity with a campaign, you use the Source field on the Opportunity form to select the campaign name. Each opportunity can be associated with multiple sources, if appropriate, but only one can be designated as the primary source.

When this association is made, the opportunity appears under the Campaign Track Results tab in the Opportunities view with the Sourced from Marketing flag checked.

Associating an Order with a Campaign

To associate an order with a campaign, you use the Campaign field on the order form to select the campaign name.

Reviewing and Adding Campaign Elements in Campaign Explorer

You can use the Campaign Explorer view in Siebel Marketing and Siebel Campaigns to review subcampaigns, contacts, activities, and offers for each campaign. The side pane of this view contains an explorer, and the main pane shows the details of the selected campaign.

You can use the detail list to add folder items. For example, to add an activity, you select the Activity folder in the side pane, and the Activities list appears in the main pane. Then, from the list, you add a new activity record.

Adding Items to Campaign Folders

The following procedure shows how to add items to campaign folders.

To add items to campaign folders

1. Navigate to the Campaigns screen, then the Explorer view.
2. In the Campaign Explorer, expand the campaign item to show its folders.
3. Click the folder.
4. In the details list, add a new record and complete the fields.

Reviewing Campaign Elements

The following procedure shows how to review campaign elements.

To review campaign elements

1. Navigate to the Campaigns screen, then the Explorer view.
2. In the Campaign Explorer, expand the folders for each campaign to display subfolders of campaign elements.
3. Click a folder to display detail of the subcampaign, contacts, activities, and offers in the list in the main pane.

Using Analyses in Campaigns

Creating an Analysis Load Format

The Analyses Load Format configuration defines the structure and format of the text or XML file generated for campaign loads and analysis exports.

To create an Analysis Load Format:

1. Navigate to **Administration - Marketing** > **Analyses Load Format**.
2. To create a new record, use the **Form Applet**.
   a. Open the **Form Applet**.

      Note: The List Applet doesn't allow creation of new records.

   b. Create a new record.
   c. Provide the required field values described in following table.

Field	Description	Required	Values or Format	More Information
Output Type	Specifies the output format for the Analysis Load Format.	Yes	Select one of the following values: o Delimiter	The supported output type depends on the selected Purpose Type. For Campaign Load,

Field	Description	Required	Values or Format	More Information
			○ XML	only comma-delimited output is supported. For Analysis Export, delimiter-based output or XML is supported.
Name	Specifies the name of the Analysis Load Format.	Yes	Enter a unique name.	The name must uniquely identify the Analysis Load Format.
Purpose Type	Specifies the purpose for which the Analysis Load Format is used.	Yes	Select one of the following values: ○ Campaign Load ○ Analysis Export	Campaign Load supports only comma-delimited CSV output. XML format isn't supported for Campaign Load. Analysis Export supports XML and delimiter-based formats.
Text Qualifier	Specifies the character used to enclose text values in delimiter-based output files.	No	Recommended value: double quotation mark (")	A text qualifier helps preserve commas within field values, handle special characters correctly, and support proper CSV parsing by downstream systems.
Max # Records	Specifies the maximum number of records written to a single output file.	No	Enter a numeric threshold value.	Use this field to limit file size for server memory optimization, better processing performance, and easier file handling. The default value is `1000`.
Header Field Format	Defines the Integration Object mapping used by Siebel EAI during data import.	Yes	Use the following format: `#<Integration_Object_Name>#`	From the 26.6 release onward, customers must specify the Integration Object name in the header field of the Analysis Load Format. Users no longer need to create a column named – `SiebelIOName-..Integration Object Mapping..`
File Prefix	Specifies the prefix for generated files.	No	Enter a file prefix value.	If a file prefix isn't specified, the generated file name starts with the campaign name.

Field	Description	Required	Values or Format	More Information
Footer (Optional)	Specifies the footer text in generated file(s)	No	Enter a Footer text value	N/A

The following table describes the fields available for configuring an Analysis Load Format

Supported Output Types by Purpose Type

The supported Output Type values depend on the selected Purpose Type. The following table lists the output formats available for each purpose.

Purpose Type	Supported Output Type	Notes
Campaign Load	Comma Delimiter only	Supports only comma-delimited CSV output. XML format isn't supported.
Analysis Export	Delimiter or XML	Supports XML and any delimiter-based format.

Header Field Format Requirements

- **Location:** Go to the **Header** field in the Analysis Load Format view.
- **Required format:** Specify the target Integration Object using this format: `#<Integration_Object_Name> #`
- **Example:** `#Marketing Contact`
- **Usage:** Siebel Enterprise Application Integration uses Integration Objects to load list data directly into transactional tables such as `S_CAMP_CON`.

Important Notes for Header Field Format Requirements

- The Integration Object name must exactly match the configured Siebel Integration Object.
- Don't add extra text, additional spaces, blank lines, or any characters after the second `#`.
- Don't press Enter after the second line.

File Naming Convention

Campaign Load File Format

```
<Prefix>_<CampaignName>_<SegmentId>_<TreatmentId>_<Timestamp>_<FileCounter>.csv
```

Example: `MKT_SummerCampaign_101_501_20260520_1.csv`

Analysis List Export File Format

```
<Prefix>_<CampaignName>_<ListDistributionId>_<Timestamp>_<FileCounter>.csv
```

Example: `EXP_CustomerList_2001_20260520_1.csv`

XML Configuration

When the Output Type is set to `XML`, the Form Applet displays additional fields for XML configuration.

For XML output, configure these properties.

Property	Description	Default Value
File Prefix	Prefix added to the generated XML file.	NA
XML Rowset Element	Specifies the root XML element name.	`rowset`
XML Row Element Tag	Specifies the XML row element name.	`row`

If values aren't provided, the default values `rowset` and `row` are used.

Important Points for XML Analysis Export

- XML output is supported only for the Analysis Export use case.
- Max Record Count, Header and Footer is available from 26.9 for XML output.
- XML file output is supported only under List Distribution.
- Campaign Load doesn't support XML output.
- Analysis List Export supports parameterized variables such as CampaignId, WaveId, and similar attributes in filter criteria while defining Analysis in Oracle Analytics Server.

  However, parameterized variables in the filter criteria are not supported for Campaign Load. Campaign Load supports only Campaign Load-purpose formats with comma-separated (CSV) output; XML-based Analysis Export formats are not available for Campaign Load.

Associating Analysis Load Format with Analysis and Analysis Collection

The Analysis Load Format is a required field and must be associated with the following objects:

- Analysis
- Analysis Collection
- Analysis List Export

The Analysis Load Format pick applet in the Analysis in Use and Analysis Collection in Use applets displays only records with the purpose Campaign Load.

In contrast, the Analysis Load Format pick applet in the List Distribution applets displays only records with the purpose List Export.

Select the **Lookup** icon next to the field to open the dialog box applet, which displays all available Analysis Format records based on the configured Purpose Type.

The following sections describe the behaviour of each view.

Behavior of the Analysis in Use and Analysis Collection in Use Views

In the Analysis in Use and Analysis Collection in Use views, the Analysis Load Format dialog box applet displays only those records where the Purpose is set to: `Campaign Load`.

Behavior of the List Distribution View

In the List Distribution view, the Analysis Load Format dialog box applet displays only the Analysis Format records whose Purpose is set to: `Analysis Export`

Validations on Analysis Load Format

The following validations apply:

- Campaign Load processing fails if an Analysis Load Format isn't associated with the corresponding Analysis or Analysis Collection in a campaign configuration.
- List Generation fails if an Analysis Load Format isn't associated with the corresponding Analysis Export record in List Distribution.

Program Screen Support

Analysis configuration is supported in the Program screen as well.

- Analysis and Analysis Collection records created in the Program Designer view support Analysis Load Format association.
- Similarly, the Program Response Definition and Lead Setup views support Analysis Load Format association through the Add Analysis button.

Adding an Analysis to a Campaign

You can add analyses and analysis collections to campaigns. Here's how:

Adding an Analysis or a List to a Campaign

1. Navigate to the **Campaigns** page.
2. Create a Campaign record and edit it.
3. Go to **Design view** > **Analysis/Lists view**.
4. Select **Add Analysis**.
5. Select the analysis and select **OK**.
6. Go to the **Allocation View** and update the Allocation Percentage.

Adding an Analysis Collection to a Campaign

1. Navigate to the **Campaigns** page.
2. Create a Campaign record and edit it.
3. Go to **Design view** > **Analysis Collection view**.
4. Select **Add**.
5. Select the Analysis Collection and select **OK**.
6. Go to the **Allocation View** and update the Allocation Percentage.

Process of Loading Customers in Campaigns

When you load a campaign, the campaign members are added to the campaign history by loading segments and lists (as well as any names added manually using the user interface). For more information about segments, see Oracle Marketing Segmentation Guide.

The following types of lists are used by Siebel Marketing and Siebel Campaigns:

- **External lists.** You can import purchased or rented lists into your application using List Management. When you use List Management with Siebel Data Quality you can scrub lists for duplicates during the import process. For more information, see *About Importing External Data*.
- **Internal lists.** You can also use List Management to maintain lists created from records that already exist in your contacts or prospects databases. For more information, see *Process of Creating and Managing Internal Lists and Subscription Lists*.
- **D&B lists.** D&B lists are generated from D&B libraries of companies based on criteria you define. The D&B module provides a library of incorporated businesses that you can market to. Using the D&B screen you can create a list of D&B contacts to use in your campaign. For more information, see the chapter about D&B in Siebel Applications Administration Guide.
- **Reviewing and Adding Campaign Elements in Campaign Explorer.** For more information on integrating List Management with D&B, see *Integrating List Management with D&B*.

Note: When a campaign has both segments and lists, the segments load before the lists.

To load customers in a campaign, you perform the following tasks:

1. *Associating Lists of Prospects or Contacts with Campaigns*
2. *Adding Contacts and Prospects to Campaigns Individually*
3. *Viewing Campaign Contacts and Prospects*
4. *Loading Campaigns*

Associating Lists of Prospects or Contacts with Campaigns

This topic discusses associating an imported (or purchased) list and an internal list of prospects or contacts with a campaign.

When you associate a purchased list with a campaign, you import the list, and then associate the list with a campaign. Prospects are only visible in the Campaign Contacts list if you successfully import the purchased list before associating it with a campaign. If contacts or prospects are added to a list after you associate that list with a campaign, then you must suspend the wave that did not include the new customers and load the campaign again.

CAUTION: If you associate an empty list (a list prepared for import but not yet imported) with a campaign and then import the list, then the prospects are not associated with the campaign and are not visible in the Campaign Prospects list.

After you associate a list with a campaign, the Contact/Prospect List does not immediately display data. You must load the campaign before the members are added to the campaign history. The list is populated after the Marketing Campaign Load workflow process runs, and you might have to refresh the browser view to display the newly associated names. For more information, see Siebel Marketing Installation and Administration Guide.

Use the following procedure to associate available imported or internal lists of contacts and prospects with your campaigns. Before you associate a list with a campaign, make sure that the Siebel Server, the Object Manager component, and Workflow Process Manager component are running.

This task is a step in *Roadmap for Setting Up Campaigns*.

Note: You can only associate *active* campaign lists with a campaign.

To associate a list of prospects or contacts with a campaign

1. Navigate to the Campaigns screen.
2. In the Campaign list, click the campaign name.
3. Select the Design view tab.
4. In the Design link bar, click Segments\Lists.
5. Click the Add List button.
6. In the Add Lists dialog box, select a list, and click OK.

   Note: When you associate a campaign list with a campaign, contacts in that list are associated with the campaign. If you change the campaign list to be inactive or if you delete it, then the contacts still appear in the Contacts/Prospects list for that campaign.

Troubleshooting the Contact and Prospect List

The Contact/Prospect list might not show contacts or prospects that have been recently associated with the list. To resolve the problem, look for it in the following table.

Symptom	Diagnostic Steps and Cause	Solution
The newly associated contacts or prospects do not appear in the Contact/ Prospect List	Marketing Campaign load is not yet complete or the browser display has not yet been refreshed.	Wait for the Marketing Campaign Load workflow process to complete and then refresh the browser.
After waiting for the Marketing Campaign Load workflow process to complete and after refreshing the browser, the newly associated prospects or contacts do not appear in the Contact/Prospect List	None of the campaign waves have been launched.	Launch one or more waves, or launch the campaign.
	None of the customers in the campaign meet the search specification for the view.	Modify the search specification. Consider the following possibilities: • Campaigns that are Launched or Completed • Campaign Wave that is launched • The campaign contact record that is assigned to the position of the user • The campaign contact records that is not Marked for Deletion • Control Campaign flag is set to N • Contact and Prospect Do Not Call Flag is set to N

Symptom	Diagnostic Steps and Cause	Solution
	The campaign contacts and prospects have been assigned to a different organization or position.	Navigate to the Campaigns screen, Design, and then the Execution Options view, and check the values for Campaign Member Ownership, Default Organization Owner, and Default Position Owner.

Adding Contacts and Prospects to Campaigns Individually

In addition to loading a campaign from segments, lists, or both, you can add individual contacts and prospects to a campaign. The ability to add or delete contacts and prospects can be controlled in the Execution Options view by using two flags (Enable Contact Editing and Enable Partner Editing of Contacts). If these flags are checked, then the New and Delete buttons are available. The buttons are available in Siebel Campaigns in the Campaign Administration views, but not the other Campaign views. For more information, see *Process of Setting Up Campaign Execution Options*.

After you add a list of contacts and prospects to a campaign and then load the campaign, these contacts and prospects appear in the All Contacts/Prospects view and in the All Contacts/Prospects Across Organizations view. You can also add contacts and prospects one at a time. For more information, see *Managing Lists*.

The following procedure shows how to add a contact or prospect to a campaign.

This task is a step in *Roadmap for Setting Up Campaigns*.

To add a contact or prospect to a campaign

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Execute view tab.
4. In the Execute link bar, click All Contacts/Prospects.
   The list of available contacts or prospects appears, with information on the selected contact or prospect record displayed in the Contact or Prospect Details form.
5. To add a contact, click Pick Contacts.
6. To add a prospect, click Pick Prospects.
7. In the Pick dialog box, perform one of the following actions:
   a. Select one or more existing records, and click OK.
   b. Click New to create a new contact or prospect, then enter the information, and click OK.
8. In the Contacts and Prospects Detail form, complete the fields.

Viewing Campaign Contacts and Prospects

If you have access to the campaign, then you can view the assigned contacts and prospects using the following procedure.

To view marketing contacts and prospects

1. Navigate to the Campaigns screen, then the Campaigns List view.
2. In the Campaigns list, click the campaign name.

3. In the Execute link bar, click All Contacts/Prospects.

   The Contacts/Prospects list appears, showing only the assigned contacts and prospects for that campaign.

Loading Campaigns

After you associate your lists, segments, and segment tree cells with your campaign, you can load the campaign. Campaigns can be loaded from the Campaign form in any of the Campaign Management views or from the Campaigns list.

The following procedure shows how to load a campaign from the Campaigns screen.

To load a campaign from the Campaigns screen

1. Navigate to the Campaigns screen.
2. From the Campaigns list, click the campaign name.

   Note: Make sure you have allocated your segments, lists or segment tree nodes to treatments before you load the campaign.

3. In the Campaign or Campaign Details form, click the menu button, and choose Load Campaign.

   Note: The Load Campaign option is active only if your administrator has given you this privilege using the Marketing access groups.

4. In the Load Campaign dialog box, assign the date and time for the load to start, and then click OK.
5. Click the Execute view tab to review the load status.
6. In the Execute link bar, perform the following steps:
   a. To display the history of each wave that has been loaded, click Execution Status.
   b. To display details of the load process, click System Tasks.
7. Click Refresh to update the load status.

About Reviewing Contacts and Prospects in Active Campaigns

Sales people and call center employees can use the Campaign Members dashboard to review the contacts and prospects in active campaigns. The Campaign Member views display a queue of active campaign contacts and prospects and a campaign summary, contact, and prospect summary.

Campaign Members screen displays the active campaign members according to several levels of visibility. The following table shows the levels of visibility available.

Level of Visibility	Description
My Campaign Members	Displays campaign contacts and prospects that are specifically assigned to the employee's position.
All Campaign Members - Outbound	Displays campaign contacts and prospects in active, launched campaign waves and the campaign members that are assigned to the employee's organization. This view does not display any members of control campaigns.

Level of Visibility	Description
All Campaign Members - Inbound	Displays campaign contacts and prospects in active, launched campaign waves and the campaign members that are assigned to the employee's organization. This view includes members of control campaigns.

The Campaign agent views only display campaign members (contacts and prospects) that are in active campaigns and for which campaign waves have been launched to the call center. Any waves that have not been launched by a member of the campaign team or administrator do not appear.

Using Waves with Campaigns

When you create a campaign, a default wave record is also created. The default record allocates 100% of the contacts in wave A. If the campaign is part of a marketing program, then you set up the waves in the Programs screen. For more information, see *Setting Up Waves for Campaign Loads*.

For stand-alone campaigns, you create waves in the Campaign screen. The delay between waves can be defined as hours or days.

This task is a step in *Roadmap for Setting Up Campaigns*.

The following procedure shows how to set up multiple waves for a stand-alone campaign.

To set up multiple waves for a stand-alone campaign

1. Navigate to the Campaigns screen.
2. Click the campaign name.
3. Click the Design view tab.
4. In the link bar, click Wave Settings.
5. Add new wave records, and save the wave records.

   Use the following table as a guide.

Field	Comment
Wave Code	Enter a wave code, up to 10 characters. You cannot save the record without a wave code. The wave code appears as part of the source code for the campaign member if you set up the source code format to include it. The wave code for the default wave is A.
Description	Describe the characteristics of the wave.
Lag	The default is 0. Enter the amount of time the wave is delayed after loading a campaign. The maximum lag for the waves cannot be greater than number of days between the start date and end date of the campaign. The wave is launched when the server processes the Launch Campaign request.

Field	Comment
	This server process can be scheduled or can be manually started using the right-click menu in the Program Flow workspace.
Lag Unit	Choose either Hours or Days.
%	The default percentage is 100 for a single wave. If you are planning multiple waves, then first reduce the percentage number in the first wave and enter the percentage of contacts who are included in the second wave. The total percent values cannot exceed 100%.

About Previewing and Generating Lists

You can create output lists of contacts for export to a fulfillment partner or another application. Direct mail vendors often require specific formatting of campaign lists. When a campaign is ready for launching, the target list can be exported according to a flexible list format and distributed using FTP or email. You can define, manage, and preview the list format without the intervention of an administrator. Default formats can be assigned for each vendor.

You can preview a sample of the list to determine whether the output file layout is what you want and then generate the actual distribution list that is sent to vendors.

After a list has been generated, the records in it do not change even when the contacts and prospects who meet the segmentation criteria change. If you modify the members of the campaign, then you must regenerate the list files using the latest data.

Lists can be generated manually using the List Distribution view in the Campaign screen or scheduled as part of a scheduled launch of a program stage or stand-alone campaign.

Previewing Lists

Prior to launching a campaign, check that the list generation works properly. To do this, preview the list and inspect how the list data appears in the fields. The preview uses the first 500 rows of contact data, and these 500 contacts might or might not be in your final generated lists. These contacts are used only to model how the list format looks with actual data.

To generate this preview file, your Export List Format must be built so that it exports data from the data source where the campaign load data is extracted. Typically, this data source is the Siebel Data Warehouse or another data mart or data warehouse where the segment members are extracted during campaign load.

This task is a step in *Roadmap for Setting Up Campaigns*.

The following procedure shows how to generate a preview list.

To generate a preview list

1. Navigate to the Campaigns screen.

2. From the Campaigns list, click the campaign name.
3. Click the Execute view tab, and in the Execute link bar, click List Distribution.
4. Select either List Export or Email Personalization as the type of list format.
5. If you selected Email Personalization, then select an email offer in the Offer field.
6. If you select List Export, then create a new record in the Vendor list:
    a. Using the Vendor select button, select a vendor.
    b. Using the Export List Format select button, select one or more export list formats. Be sure to select an appropriate list format type for the type of channel (direct mail, email, and so on).
7. Click Generate Output Lists to generate the preview file.
8. In the dialog box, select one or more waves, and then click OK:
    a. Give the server a few minutes to process the job, and then click the Refresh button in the Generated Lists applet.
    b. (Optional) To monitor the job, click System Tasks in the Execute link bar.

When the file is created, it appears in the Generated Lists list. If the list format has splits set up in the formatting, then multiple files appear in the list. Refer the Content Description column to view details about the file contents. Drill on the list name to open it, or save it to your computer.

Manually Generating Campaign Lists

The following procedure explains how to manually generate a list for a campaign.

This task is a step in *Roadmap for Setting Up Campaigns*.

To generate a list for a campaign

1. Navigate to the Campaigns screen, and in the Campaign list, click the campaign name.
2. Click the Execute view tab, and in the Execute link bar, click List Distribution.
3. Click New to create a new list distribution entry.
4. Select a vendor.

    If the vendor has a default list format, then that format name appears in the Export List Format field.
5. Click the Export List Format select button.
6. In the Pick Export List Format dialog box, select your list format from the folders.
7. Click Generate Output Lists to generate the file.
8. Give the server a few seconds or minutes to process, and then click the Refresh button in the Generated Lists applet.

    If desired, use the System Tasks view under Execute tab to monitor the job.

    When the file is created, it appears in the Generated Lists list. If the list format has splits set up in the formatting, then multiple files appear in the list. See the Content Description column to view details about the file contents. You can click the list name to open it, or save it to your computer.

Integrating Contact Planning Rules in Marketing Campaigns

Contact planning rules are enterprise-wide rules that allow recency, frequency, volume and channel constraints for customer, channel, and program dimensions. Contact planning rules can be set up by adding input parameters to the Get List Format System Data step of the Marketing Campaign Load workflow. Parameter names must match those specified in the webexpression.xml file in Oracle Business Intelligence. For more information on contact planning rules, see Oracle Marketing Segmentation Guide.

Note: Contact planning rules are supported only in Oracle Business Intelligence 10.1.3.4 or later.

8 Launching Programs and Campaigns

Launching Programs and Campaigns

This chapter describes how to launch programs and campaigns, a process which sends output lists of contacts to a fulfillment partner or another application. It includes the following topics:

- *About Launching Programs and Campaigns*
- *Process of Launching Campaigns*
- *Process of Using the Schedule Calendar View*
- *Displaying Campaign Charts in Siebel Campaigns*
- *Process of Displaying Response Charts in Siebel Campaigns*

About Launching Programs and Campaigns

When a campaign is ready for launch, the target list of contacts can be exported to a fulfillment partner or another application. Because direct mail vendors often require specific formatting of campaign lists, you can define, manage and preview the output list format without the intervention of an administrator.

When you launch a campaign, the Server Request Broker starts the Marketing Campaign Launch workflow process. This process sends contact list files to specified vendors, most commonly using FTP (file transfer protocol), and email offers are sent to targeted recipients.

You can launch a marketing program in the following ways:

- **Launch a campaign manually.** You can launch a campaign using the applet menu in the campaign list and campaign form views, or by right-clicking the campaign shape in the Program Flow designer and by selecting Launch Campaign. For more information about manual execution, see *Launching Campaigns Manually*.
- **Launch a program stage automatically.** You can schedule a stage of a program to launch automatically (including all the campaigns in the stage) from the Program screen. In the Schedule view tab, click the Calendar link. For more information about automatic execution, see *Process of Using the Schedule Calendar View*.
- **Launch a campaign automatically.** You can schedule a campaign to launch automatically from the Campaign screen. In the Schedule view tab, click the Calendar link. For more information, see *Process of Using the Schedule Calendar View*.

You launch email campaigns through the Siebel Email Marketing Server. Export list files and faxes are distributed through the Siebel Communication Server. Make sure that your Email Marketing Server and Communication Server are online so that the launch completes successfully.

When you launch a campaign, you must know which campaign wave or waves you want to launch, especially if your campaign is a recurring campaign. In most cases, the wave you want is the most recent wave. However, when you launch the campaign, make sure that you select the correct wave from the Launch Waves dialog box.

> **Note:** On the Marketing Server component, a parameter called Wave Batch Size determines the number of subwaves created. Each subwave creates a new request or thread to the email sending daemon.

For email campaigns, the Email marketing server can process parallel tasks for improved scalability. To enable the generation of email files for each thread, be sure to split the Email Server list format correctly.

Process of Launching Campaigns

You can choose to manually launch one or more waves of a campaign. You can launch a campaign using the applet menu in the campaign list and campaign form views, or by right-clicking the campaign shape in the Program Flow designer and by selecting Launch Campaign.

To launch a campaign, perform the following tasks:

- *Launching Campaigns Manually*
- *Launching Email and Fax Campaigns*
- *Checking Campaign Launch Status*
- *Suspending and Relaunching Email Campaigns*

Launching Campaigns Manually

Before launching a campaign manually, make sure you have performed the following tasks:

- Add a position to the marketing Administrators Access Group. The position of the person who launches the campaign must be a member of the Marketing Administrators access group. If the position is not part of this access group, then the launch buttons are unavailable. For instructions, see *Siebel Marketing Installation and Administration Guide*.

  Note: This requirement also applies to a partner using the Siebel Partner Portal.

- In the Campaign List Distribution view, set up vendors and export list formats.
- Load any segments, segment tree cells, and lists that you plan to use into the campaign history.
- If you plan to send offers that use a distribution profile, then test the campaign to make sure that the profile is set up correctly and that offer is sent with expected results. For more information on testing campaigns, see *Testing Campaigns*.

You can choose to manually launch one or more waves of a campaign. You can launch a campaign using the applet menu on the campaign form in any of the campaign views or by right-clicking on the campaign in the program flow.

Launching a campaign calls the Marketing Campaign Launch workflow process. After launching a campaign, you can check the results by looking at history records for programs, stages, and campaigns.

The following procedure shows how to manually launch campaigns.

To manually launch campaigns

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. From the campaign form menu, choose Launch Campaign.
   The Launch Campaign Dialog Box contains the valid waves that are available for launching. Waves with a status of Loading, Load Failed, Scheduled, Launched, Purged, or Purge Failed do not appear.
4. In the Launch Campaign dialog box, select one or more waves to launch, and click OK.

Launching Email and Fax Campaigns

If you have tested your email or fax campaign, and the results are satisfactory, then you are ready to send the email offers to campaign recipients.

The following procedure shows how to send email and fax offers.

To send email and fax offers

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Design view tab.
4. In the Campaigns form, click the menu button, and choose Launch Campaign.
5. In the Launch Waves dialog box, select a wave to launch, and click OK.

About the Marketing Campaign Launch Workflow Process

When you launch a campaign, the Marketing Campaign Launch workflow process is initiated. For more information about workflow processes, see Siebel Business Process Framework: Workflow Guide.

Siebel Marketing sends the exported list file to each vendor in the List Distribution list of the Waves view, using distribution adapters and profile information. For example:

- **Email**. Siebel Marketing emails the exported list file to the vendor's primary contact.
- **FTP**. Each vendor has a profile specifying the host name, user name, and password. Siebel Marketing sends the exported list file using File Transfer Protocol to the vendor's FTP server.

For each wave, the server receives a request to send each valid offer in the campaign on the day the program is executed, adding to that date any lag days defined in the wave. Only those contacts or prospects assigned to a particular wave receive the offer.

Checking Campaign Launch Status

After you launch a campaign you can check its status and determine whether it was successfully launched or whether it failed.

The following procedure shows how to monitor campaign launch status.

To monitor campaign launch status

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name that you launched.
3. Click the Execute view tab.
4. In the Execute view link bar, click System Task.
5. In the System Tasks list, search for the Campaign Launch and Wave Launch jobs.

   Use the Wave # field to find the wave that you launched.

6. In the System Tasks list, click Refresh to update the values in the record.

   The Status field has three indicator boxes as shown in the following table.

Position	Color	Meaning
1	Red	An error occurred. The error message appears in the System Tasks and Task Log lists.
2	Yellow	Pending. The launch has not yet completed.
3	Green	The launch completed successfully with no errors.

7. To display the Task Log list, navigate down.

If campaign launch fails, then you can display an error log using the Administration - Server Management screen's Tasks view.

Suspending and Relaunching Email Campaigns

A wave of a campaign can be suspended and relaunched in the event of an error or if you have to roll back a wave. For example, if email offers are not delivered because of a setup problem in the Email Marketing Server, then you can relaunch the wave to resend the offers. Also, if you launch a wave into the call center, then you can recall the wave so that it no longer appears to sales agents until the wave is relaunched.

Suspending a Campaign Wave

The following procedure shows how to suspend a campaign wave.

To suspend a campaign wave

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click a campaign name.
3. Click the Execute view tab.
4. In the Execute link bar, click Execution Status.
5. Locate the Wave with a Launched or Launch Failed status.

   Use the Wave # field to confirm that you are displaying the correct wave.
6. To suspend the wave, select the wave record and click Suspend Wave.
7. After the wave is suspended, Suspended appears in the Status field.

Make the necessary corrections, and then relaunch the campaign wave as described in *Relaunching a Campaign Wave*.

Relaunching a Campaign Wave

The following procedure describes how to relaunch a suspended campaign wave.

To relaunch a suspended campaign wave

1. Navigate to the Campaigns screen.

2. In the Campaigns list, select a campaign to relaunch.
3. Click the Execute view tab.
4. In the Execute link bar, click Execution Status.
5. Locate a wave to relaunch.

   Use the Wave # field to confirm that you are displaying the correct wave.
6. In the Wave list, select the wave record, and click Launch Wave.

   Launching a suspended wave resends any email offers and vendor list files. It also causes the campaign members in the wave to reappear in the call center.

Process of Using the Schedule Calendar View

When you complete a program design using Program Flow, you can schedule a stage of the program for execution using the Schedule calendar view.

To use the schedule calendar view, perform the following tasks:

- *Scheduling a Stage Execution and Editing a Schedule*
- *Scheduling the Execution of Campaigns*

Schedule Calendar View

When you complete a program design using Program Flow, you can schedule a stage of the program for execution using the Schedule calendar view. During automatic program execution, the Campaign Load and Marketing Campaign Launch workflow processes run for each campaign in the stage. If the stage is recurring, then when the run of the stage is completed, it reschedules itself for the next run. For more information about workflow processes, see *Siebel Business Process Framework: Workflow Guide* .

The Schedule view displays the details of the selected program in the Program form and the calendar.

Scheduling a Stage Execution and Editing a Schedule

The procedures in this topic describe how to schedule stages of a program for automatic execution, and how to edit an existing schedule.

Scheduling the Execution of a Stage

Use the following procedure to schedule the execution of a stage of a program.

To schedule the execution of a stage

1. Navigate to the Programs screen.
2. In the Programs list, click the program name.
3. Click the Schedule view tab.
4. In the Calendar view, click the calendar icon for the date that the program starts.
5. In the activity form, complete the fields using the following table as a guide.

Field	Comment
Comment	Enter more information about the program schedule, if desired.
Description	This field displays the previously added program description. Enter more information if desired.
Frequency	If the program is repeating, then choose the repeat cycle from the list. Options are Daily, Weekly, Monthly, Quarterly, and Yearly.
Planned Completion	The default value in this field is the program's end date. Click the calendar select button, use the calendar controls to set the date and time.
Planned Start	The default value in this field is the program start date. Click the calendar select button, and use calendar controls to set the start date and time for program execution.
Stage	(Required) You must select the stage of the program that is to execute.
Type	(Required) The Type field displays Stage Execution as the default. If Stage Execution does not appear in the field, then select it from the list.
Frequency	Specify whether or not the stage repeats over time and, if it does, how often it repeats.

6. Select the Active Flag so that the scheduling takes effect.

   If you select the active flag, then the stage executes as soon as the activity time arrives. If you do not select the active flag, then no execution occurs.
7. Click Save This One when you are ready to save the schedule.

   The stage name and launch time appear in the Schedule calendar. The calendar also reflects any recurrence of the stage. If you select the Timeline view, then the stage is displayed and timeline bars indicate any activities scheduled for the stage. A timeline bar is not displayed for the stage itself or for the campaigns associated with it. Timeline bars for programs and campaigns are visible in the Marketing Calendar screen.

Editing a Stage

The following procedure shows how to edit a schedule.

To edit a schedule

1. Navigate to the Programs screen.
2. In the Programs list, click the program name.
3. Click the Schedule view tab.
4. In the Schedule's calendar, click the program name to open the Schedule form.

   Make sure the Active Flag is still checked so that execution occurs.

5. In the Schedule form, make changes, and click Save This One.
6. Alternatively, click Delete This One to delete the schedule.

   If the stage repeats over time, then you are asked if you want to delete a single instance or every repeating instance.

Scheduling the Execution of Campaigns

Campaigns can be created and set up to execute automatically in accordance with a schedule you specify. This topic describes how to perform this task.

If you choose to execute a campaign using the campaign scheduler, and if your campaign includes a number of waves, then be aware that you cannot select the wave that is executed by the scheduler. Siebel Marketing submits a Campaign Launch Workflow request for all campaign waves that have not yet been executed. This means that while the current campaign wave is executed as scheduled, so too are any older waves which had not been successfully executed previously.

> **CAUTION:** Do not perform this procedure if you already plan to schedule the parent stage for the same campaign. Doing so causes the campaign to be launched twice.

The following procedure describes how to schedule the automatic execution of a campaign.

To schedule the execution of a campaign

1. Navigate to the Campaigns screen.
2. In the Campaign list, click the campaign name.
3. Select the Schedule view tab.
4. In the Schedule calendar, click the calendar icon in the day that the campaign starts.
5. In the activity form, in the Activity Type field, select Campaign Load and complete the remaining fields.

   > **Note:** Be sure to check the Active Flag for the scheduling to take effect. If the active flag is set, then the campaign load launches as soon as the activity time arrives. If the active flag is not set, then no execution occurs.

6. Click Save This One when you are ready to save the schedule.

   The campaign name and load time appear in the Schedule calendar. The calendar also reflects any recurrence of the activity.
7. Click New to create another activity.
8. In the activity form, in the Activity Type field, select Campaign Launch, and complete the remaining fields.

   Make sure to set the start time of the campaign launch activity so that the preceding campaign load activity completes before the corresponding campaign launch begins.

   > **Note:** The Campaign Execution activity type executes the load and launch processes for the campaign serially.

9. Verify that the Active Flag is set so that the scheduling takes effect.

10. Click Save This One when you are ready to save the schedule.
    The campaign name and launch time appear in the Schedule calendar. The calendar also reflects any recurrence of the activity.

Displaying Campaign Charts in Siebel Campaigns

Only Siebel Campaigns uses Campaign charts, and you use these charts to review performance and graphically display results in a chart for areas such as incentive compensation, completed calls, lead quality by campaign, and so on. When you display a chart, the saved query in the upper corner filters the information shown in the chart.

To display charts in Siebel Campaigns, perform any of the following tasks:

- *Displaying Campaign Achievement Charts*
- *Displaying Call Status Analysis Charts*
- *Displaying Call Status Analysis by Employee Charts*
- *Displaying Lead Quality Analysis by Campaign Charts or Response Charts*
- *Displaying Opportunity Revenue Analyses*
- *Displaying Order Revenue Analysis Charts*
- *Displaying Campaign Trend Analyses*

Displaying Campaign Achievement Charts

The Campaign Achievement chart displays the results of the Sales Quota Plan set up for each campaign. The chart represents the percentage achievement of quota for each campaign and applies Incentive Compensation functionality to campaigns.

Preparing to Generate Campaign Achievement Charts

The following procedure shows how to prepare for generating the Campaign Achievement charts.

To prepare for generating the Campaign Achievement charts

1. Create a quota plan, and associate quota plan objectives and participants with the plan.
   Quotas are discussed in *Creating Campaign Quota Plans*.
2. Enter achievement values by performing these tasks:
   a. Navigate to the Sales Quotas screen.
   b. In the Quota Achievement list, select the quota plan.
   c. Enter the amount you achieved compared to quota numbers.
      You can add Achievements manually or by using a workflow process that completes achievements based on actions in Siebel Call Center.

Displaying Campaign Achievements in Siebel Campaigns

Use the following procedure to display the Campaign Achievement Chart from the Achievement Analysis view of the Sales Quota screen or the Charts view of the Campaigns screen.

To display Campaign Achievements in Siebel campaigns

1. Navigate to the Campaigns screen.
2. In the Campaigns link bar, select Charts.
3. In the drop-down list, select Campaign Achievements.
4. In the Objects Against Achievement list, select the plan name.
5. In the By drop-down list, select Campaign Name or Objective Name.
6. Select the chart type from the third drop-down list.
7. Click Go to display the chart.

Displaying Call Status Analysis Charts

The Call Status Analysis chart displays the number of calls that have been completed compared to the number of calls that have not been completed for each campaign. This chart can be used by a call center manager to determine which campaigns are lagging and where to shift resources.

The following procedure shows how to update the Call Status field.

To update the Call Status field

1. Assign any contacts and prospects you are contacting to the campaign.

   For more information, see *Adding Contacts and Prospects to Campaigns Individually*.
2. After each contact or prospect is called, update the status in the Call Status field in the Contacts or Prospects list or form.

   The chart is based on information from this field. A Call Completed flag indicates that the call is completed and the number of contacts and prospects targeted by the campaign.

Displaying Call Status Analysis by Employee Charts

The Call Status Analysis by Employee chart displays completed and uncompleted calls by a specified employee for each campaign. The values for this chart can be derived from lists of contacts and prospects assigned to the position and the Calls Completed field for the contact or prospect record in the Contacts or Prospects view.

A campaign list can be associated with a position. When such association occurs, the position becomes the owner of the Campaign Contacts or Campaign Prospects. If the OwnerID is assigned, then only the employees of that position can display the Campaign Contacts or Prospects for a particular campaign. If the list is not assigned, then the OwnerID is NULL and any employee assigned to the Campaign Team or Campaign Group can display the Contacts or Prospects view.

The following procedure shows how to prepare for generating the Call Status Analysis by Employee chart.

To prepare for generating the Call Status Analysis by Employee chart

1. If the employee position is evaluated based on lists of contacts and prospects, then assign the lists to the position in the Campaign Lists view.

   The position becomes the owner of the list's contacts and prospects.

When you associate a list with a campaign, if the Position field is not empty, then the OwnerID or each contact or prospect in that list is associated with that position.

Most companies do not assign the contacts or prospects to a position, so the OwnerID is NULL. In such cases, the chart shows only one employee: Unknown.

2. Update call status in the Campaign Contacts view.

   The chart draws its values on which contacts have been called based on the Done flag in the Call Status field. Make sure this field reflects the current status of the call.

Displaying Lead Quality Analysis by Campaign Charts or Response Charts

The Lead Quality Analysis by Campaign chart displays the opportunities that have been created for the campaign when the Response Type is set to Opportunity. Using this chart, you can display opportunities by number of opportunities, by total opportunity revenue, or by average opportunity broken out by lead quality.

Preparing to Generate the Lead Quality Analysis by Campaign Chart

The following procedure shows how to prepare to generate the Lead Quality Analysis by Campaign chart.

To prepare to generate the Lead Quality Analysis by Campaign chart

1. In the Campaigns list, click the campaign name, click the Responses view tab, and verify that the Response Type field is set to Opportunity.
2. In the Opportunities screen, for each opportunity created for a campaign, make sure values are entered in the Lead Quality, Revenue, and Source fields.

   You can use the My Opportunities or All Opportunities views to display the opportunities you want to check.

The Lead Quality by Response chart displays the opportunities that have been created for a campaign when the campaign's Response Type is set to Response. The chart displays opportunities by number of opportunities, by total opportunity revenue, or by average opportunity broken out by lead quality.

Preparing to Generate the Lead Quality by Response Chart

The following procedure shows how to prepare to generate the Lead Quality by Response chart.

To prepare to generate the Lead Quality by Response chart

1. In the Campaigns list, make sure the Response Type is set to Opportunity.

   The Response Type field is in the Response's view tab, after drilling down on the campaign name.
2. In the Opportunities screen, make sure that the Revenue, Lead Quality, and Source fields are completed for each opportunity.

Displaying Opportunity Revenue Analyses

You can display opportunity revenue analyses on two charts:

- Opportunity Revenue Analysis Chart
- Opportunity Revenue Analysis by Employee Chart

Opportunity Revenue Analysis Chart

The Opportunity Revenue Analysis chart displays the campaign's Number of Opportunities and the Expected Revenue for those Opportunities. The left axis is Opportunity Revenue and the bar chart corresponds to Revenue. The right axis is the Number of Opportunities and the line chart corresponds to Revenue.

When using the chart, Opportunity Revenue Analysis by Campaign, only campaigns set to response type Response are used to create the chart.

This chart displays the relationship between the amount of revenue and the number of opportunities for campaigns. For example, a campaign administrator can use the chart to identify campaigns that are generating a high volume of opportunities but have a low potential for revenue and campaigns which generate a smaller number of opportunities but have a higher potential revenue for each opportunity.

Before generating the chart, navigate to the Opportunities screen and make sure that the Revenue field contains a value for each opportunity associated with the campaign.

Displaying Opportunity Revenue Analysis by Employee Charts

The Opportunity Revenue Analysis by Employee chart shows the number of Opportunities and the potential revenue for opportunities for each employee. This chart displays information in the same way as the Opportunity Revenue Analysis chart, but it targets employees in the analysis.

The following procedure shows how to prepare for generating the Opportunity Revenue Analysis by Employee chart.

To prepare for generating the Opportunity Revenue Analysis by Employee chart

1. Navigate to the Opportunities screen.
2. Select an opportunity associated with the campaign.
3. Make sure that the Revenue contains a value.
4. In the Sales Team field, enter the User ID of the agent generating the opportunity.

Displaying Order Revenue Analysis Charts

The Order Revenue Analysis Chart shows the total revenue for orders generated by campaign. Before you can create this chart, you must verify that an order is associated with a response. If it is not, then you can associate it using the following procedure.

To associate an order with a response

1. Navigate to the Campaigns screen.

2. Select a Campaign with the Response Type set to Response.

   Note: This chart only shows data for campaigns with Response Type set to Response.

   The Response Type field is in the Response's view tab, after drilling down on the campaign name.
3. Click the campaign name.
4. Click the My Contacts/Prospects view tab.
5. Click Create Response.
6. For this response, click the Orders tab, and create a new record.
7. Click the Order number to enter details for the order.

Displaying Campaign Trend Analyses

You can display campaign trend analyses using two charts:

- Campaign Trend Analysis Chart
- Campaign Trend Analysis by Employee Chart

Displaying a Campaign Trend Analysis Chart

The Campaign Trend Analysis chart displays the total number of responses for each campaign over a period of time. The period can be set to day, week, month, quarter, or year.

Before generating the chart, review responses for each campaign by navigating to the Campaigns view, selecting the campaign, and clicking the Responses view tab.

Displaying a Trend Analysis by Employee Chart

The Campaign Trend Analysis by Employee chart displays the total number of responses generated by each employee for campaigns over a period of time. The period can be specified by day, week, month, quarter, or year.

The following procedure shows how to verify that each response is associated with an employee.

To verify that each response is associated with an employee

1. Navigate to the Campaigns screen.
2. In the Campaigns list, click the campaign name.
3. Click the Track Results view tab.
4. In the Track Result link bar, click Responses.
5. Review the list of responses, making a note of the description and user.
6. Navigate to the Responses screen.
7. For each response you found in Step 5, make sure that the Created By field contains the User ID of the employee who handled the response and, therefore, owns it.

Process of Displaying Response Charts in Siebel Campaigns

Siebel Marketing and Siebel Campaigns include response charts. Use response charts to analyze response to your campaigns in areas such as opportunities, revenue, campaign offers, and so on. When you display a chart, the saved query in the upper corner filters the information shown in the chart.

To display response charts in Siebel Campaigns, perform the following tasks:

1. *Accessing the Response Charts*
2. *Displaying the Campaign Analysis (Response) Charts*
3. *Displaying the Opportunity Analysis (Response) Charts*
4. *Displaying the Offer Analysis (Response) Charts*
5. *Displaying the Offer Type Analyses (Response) Charts*
6. *Displaying the Revenue Analysis (Response) Charts*
7. *Displaying the Average Opportunity Revenue Analysis (Response) Charts*

Accessing the Response Charts

Response charts analyze the response to your campaigns in areas such as opportunities, revenue, campaign offers, and so on.

The following procedure shows how to access Response charts.

To access Response charts

1. Navigate to the Responses screen, then the Charts view.
2. In the Charts view use the visibility filter to select the type of data to display.
3. In the drop-down list next to the Show field, select the type of chart, and click Go.

   To change the type of chart, select a different type, and click Go.

Displaying the Campaign Analysis (Response) Charts

The Campaign Analysis chart displays the total number of responses for each campaign. Before you can create this chart, you must verify that the response is associated with a campaign. If it is not, then you can associate it using the following procedure.

To associate the response with a campaign

1. Navigate to the Responses screen.
2. In the Campaign Name field, associate the response with a campaign.

Displaying the Opportunity Analysis (Response) Charts

The Opportunity Analysis chart displays the total number of opportunities created for each campaign, based on the Source field in the opportunity record. Before you can create this chart, you must verify that opportunities have been created for the campaign as described in the following procedure.

To verify the opportunities are created

1. Navigate to the Responses screen.
2. For each response to your campaign, verify that opportunities are created (if applicable).
3. If no opportunities have been created for the campaign, then you can create them using the following procedure:
    a. Select the response record in the Responses list.
    b. In the Response form, click Create Opportunity.

An opportunity is created for the campaign and the campaign name is entered in the Source field for the opportunity.

Displaying the Offer Analysis (Response) Charts

The Offer Analysis chart shows the total number of responses for each offer based on the offer associated with the response. Before you can create this chart, use the following procedure to verify that the correct offer is associated with the response.

To verify the correct offer is associated with the response

1. Navigate to the Responses screen.
2. For each response to campaigns featuring the offer, make sure the correct offer is associated with the response by reviewing the response record's Offer field.

Displaying the Offer Type Analyses (Response) Charts

You can display offer type analyses (response) through two different charts:

- Offer Type Analysis (Response) Chart
- Offer Type Analysis (Response) by Campaign Chart

Displaying Offer Type Analysis (Response) Charts

The Offer Type Analysis chart displays the total number of responses for each offer type for all campaigns. Before you can create this chart, use the following procedure to verify that the offer is identified for the response.

To verify the offer is identified for the response

1. Confirm that each offer associated with the campaign has an offer type and offer name specified.

    For more information about finding or completing these fields, see *Process of Creating and Modifying Offers*.

2. Add the responses received during the campaign.

   The offer is identified for the response in the Offer Name field.
3. Generate the chart.

   To generate charts, follow the procedure in *Process of Displaying Response Charts in Siebel Campaigns*.

Displaying Offer Type Analysis (Response) by Campaign Charts

The Offer Type Analysis by Campaign chart displays the total number of responses for each offer type for each campaign. Each campaign can have many offers.

The following procedure shows how to generate the Offer Type Analysis by Campaign chart.

To generate the Offer Type Analysis by Campaign chart

1. Confirm that each offer associated with the campaign has an offer type and offer name specified.

   For more information about finding or completing these fields, see *Process of Creating and Modifying Offers*.
2. Confirm that the offers you want in the chart have been added to the campaign.

   For more information about this procedure, see *Associating Offers and Segments with Campaigns*.
3. Add the responses received.
4. Generate the chart.

   To generate charts, follow the procedure in *Process of Displaying Response Charts in Siebel Campaigns*.

Displaying the Revenue Analysis (Response) Charts

The Revenue Analysis (Response) chart displays the total revenue for each campaign and the total number of opportunities for each campaign. The bar chart shows the revenue by campaign and the line graph shows the number of opportunities for each campaign.

Values for this chart are derived from the Revenue and Source fields in the Opportunity screen's My Opportunities or All Opportunities list. The revenue number is derived from the sum of the Revenue fields in the Opportunity records, with the Source field set to the campaign name. Before generating this chart, make sure to complete these fields for opportunities used in this analysis.

Displaying the Average Opportunity Revenue Analysis (Response) Charts

The Average Opportunity Revenue Analysis chart displays the average revenue for each campaign. For each opportunity created for the campaign, the revenue is added and the average is taken for all opportunities created for the campaign.

Values for this chart are derived from the Revenue and Source fields in the Opportunity screen's My Opportunities or All Opportunities list. The revenue number is derived from the average of the Revenue fields in the Opportunity records, with the Source field set to the campaign name. Before generating this chart, make sure to complete these fields for opportunities used in this analysis.

9 Managing Lists

Managiing Lists

This chapter describes how to create and manage lists of contacts and prospects within applications for use in marketing campaigns. It includes the following topics:

- *Siebel List Management Module*
- *About Importing External Data*
- *Contact List Import Using PL/SQL*
- *Importing External Data and Creating Data Mappings*
- *Process of Creating and Managing Internal Lists and Subscription Lists*
- *Promotion of Prospects to Contacts*
- *Process of Viewing and Maintaining Lists*
- *Integrating List Management with D&B*

Siebel List Management Module

The List Management module is available to users with a license for Siebel Marketing or Siebel Campaigns.

> **Note:** The Siebel Campaigns module can be added to any base application, including Siebel Sales, Siebel Call Center, and Siebel Partner Relationship Management.

Use List Management to create and manage lists of contacts and prospects within your applications for use in marketing campaigns. A *list* is defined as a grouping of contact or prospect records in the Siebel database.

Contacts are customers already in the Siebel database. Prospects are potential customers who have yet to be screened, qualified, and promoted to contacts. By using this distinction, List Management can eliminate prospects that do not qualify for promotion to contacts.

For example, you rent a magazine subscriber list containing 1,000 names and addresses. You want to contact these people, but because the list is rented, you might not add the records into your Siebel database as contacts unless they become customers generating revenue. You must be able to remove the names from your database when you return the list. Use Siebel List Management to identify these names and addresses as temporary prospects until they can be promoted to contacts.

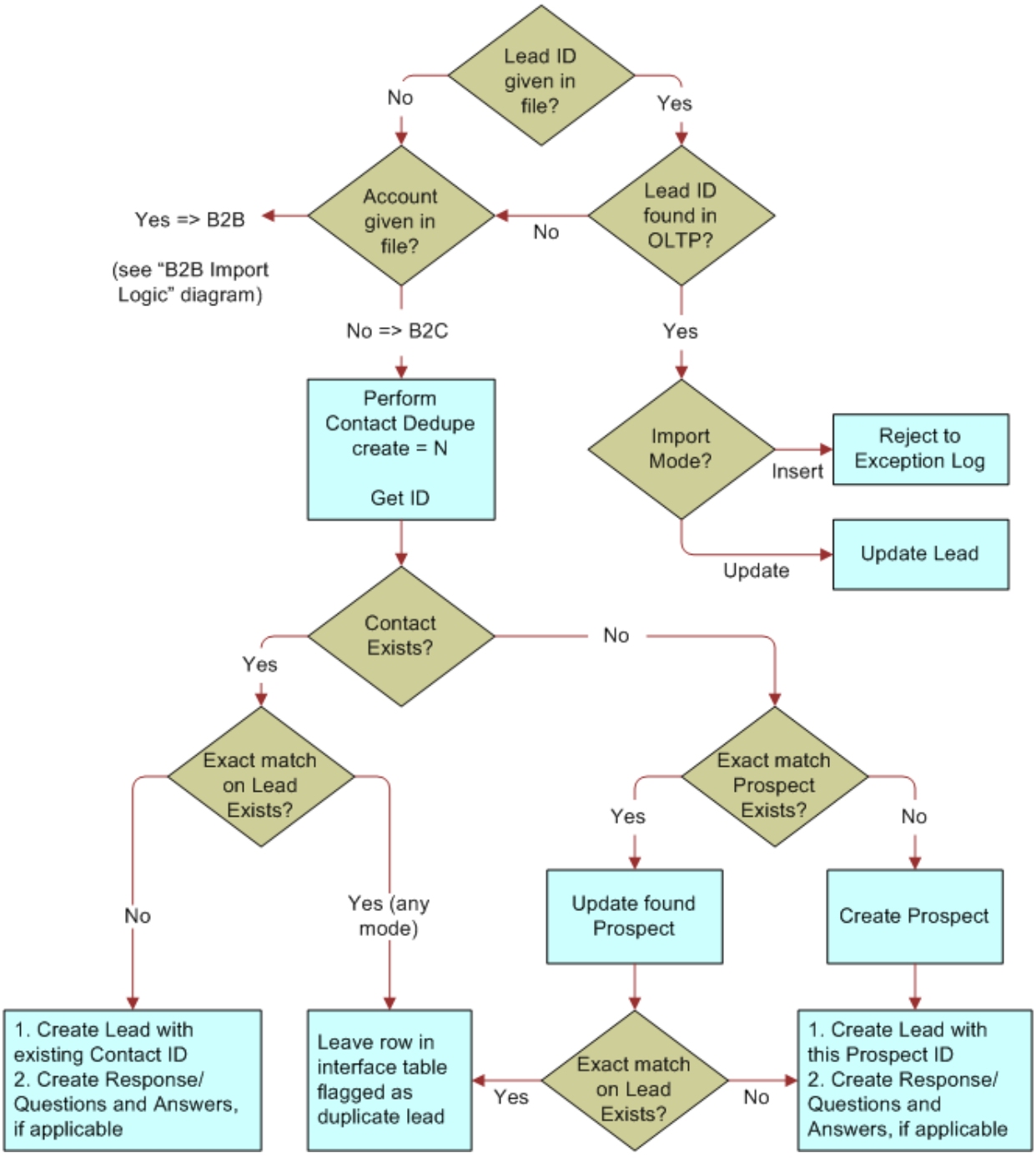
About Importing External Data

This topic provides information about importing external data, for example, lists of leads or contacts, into Siebel Marketing. For instructions about how to import external data and create data mappings between the imported data and Siebel Marketing tables, see *Contact List Import Using PL/SQL*.

Each import job uses a reusable import mapping between the columns of the input data and the columns of the Siebel Marketing tables. The job can also be configured to ignore certain fields, allow field updates, or require columns to have an exact match while checking for duplicates. Once the job has been defined with import mappings, it can be scheduled to run. Jobs can be executed on a recurring basis. You can monitor an activated job for exceptions and errors.

The Lead Import workflow handles the lead import logic. The Response Import, Account Import, and Contact Import workflows allow multi-threaded batch import of responses, accounts, and contacts from external files to core CRM tables. The core import logic of these workflows is not customizable. For more information about activating and customizing workflows, see *Siebel Business Process Framework: Workflow Guide* .

The following figure illustrates the lead import logic.

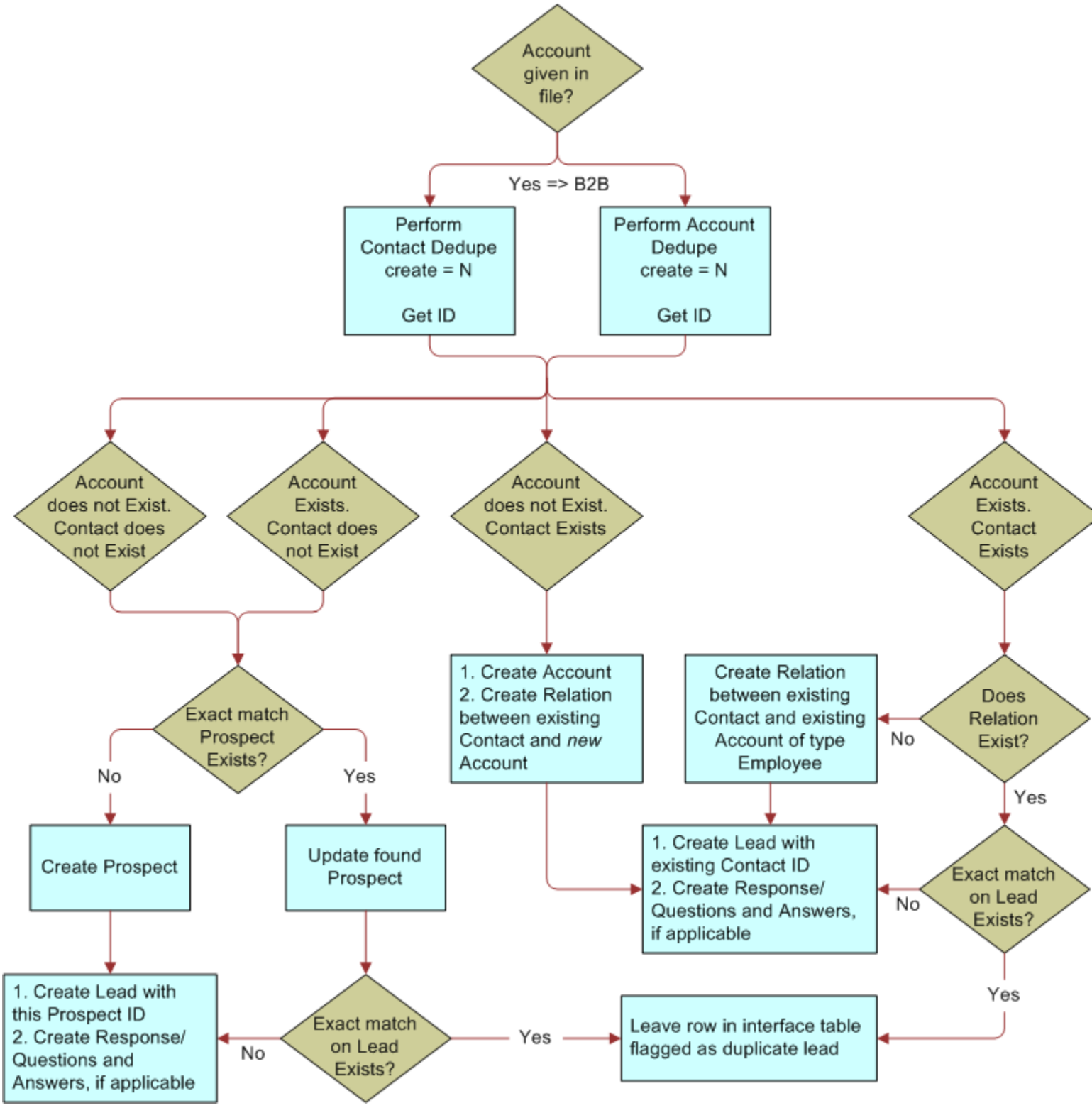


This workflow does the following:

- *Lead ID given in file?.* Verifies whether a Lead ID is specified in the file.
- *Lead ID found in OLTP?.* Verifies whether a Lead ID is available in OLTP if the Lead ID is specified in the file.
- *Import Mode?.* Verifies the mode of import for the lead available in OLTP.
- *Reject to Exception Log.* Adds the Lead ID to exception log as rejected if the Import Mode is set to Insert.
- *Update Lead.* Updates the lead if the Import Mode is set to Update.
- *Account given in file?.* Verifies whether Account is specified in the file if Lead ID is not found in OLTP.

- *Perform Contact Dedupe create = N Get ID.* Performs contact deduplication to get ID, if account is not specified in the file.
- *Contact Exists?.* Verifies whether a contact exists.
- *Exact match on Lead Exists?.* Verifies whether exact match on lead exists if a contact exists.
- *1. Create Lead with existing Contact ID. 2. Create Response/Questions and Answers, if applicable.* Creates lead with an existing contact ID and creates responses or questions and answers if applicable.
- *Leave row in Interface table flagged as duplicate lead.* Mark the lead as duplicate if exact match on lead exists.
- *Exact match Prospect Exists.* Verifies whether exact match prospect exists.
- *Create Prospect.* Creates prospect if exact match prospect does not exist.
- *1. Create Lead with this Prospect ID. 2. Create Response/Questions and Answers, if applicable.* Creates lead with the created prospect ID and creates responses or questions and answers if applicable.
- *Update Found Prospect.* Update process identifies a prospect if the exact match prospect exists.
- *Exact match on Lead Exists?.* Verifies whether exact match on a lead exists.

The following figure illustrates the B2B import logic.

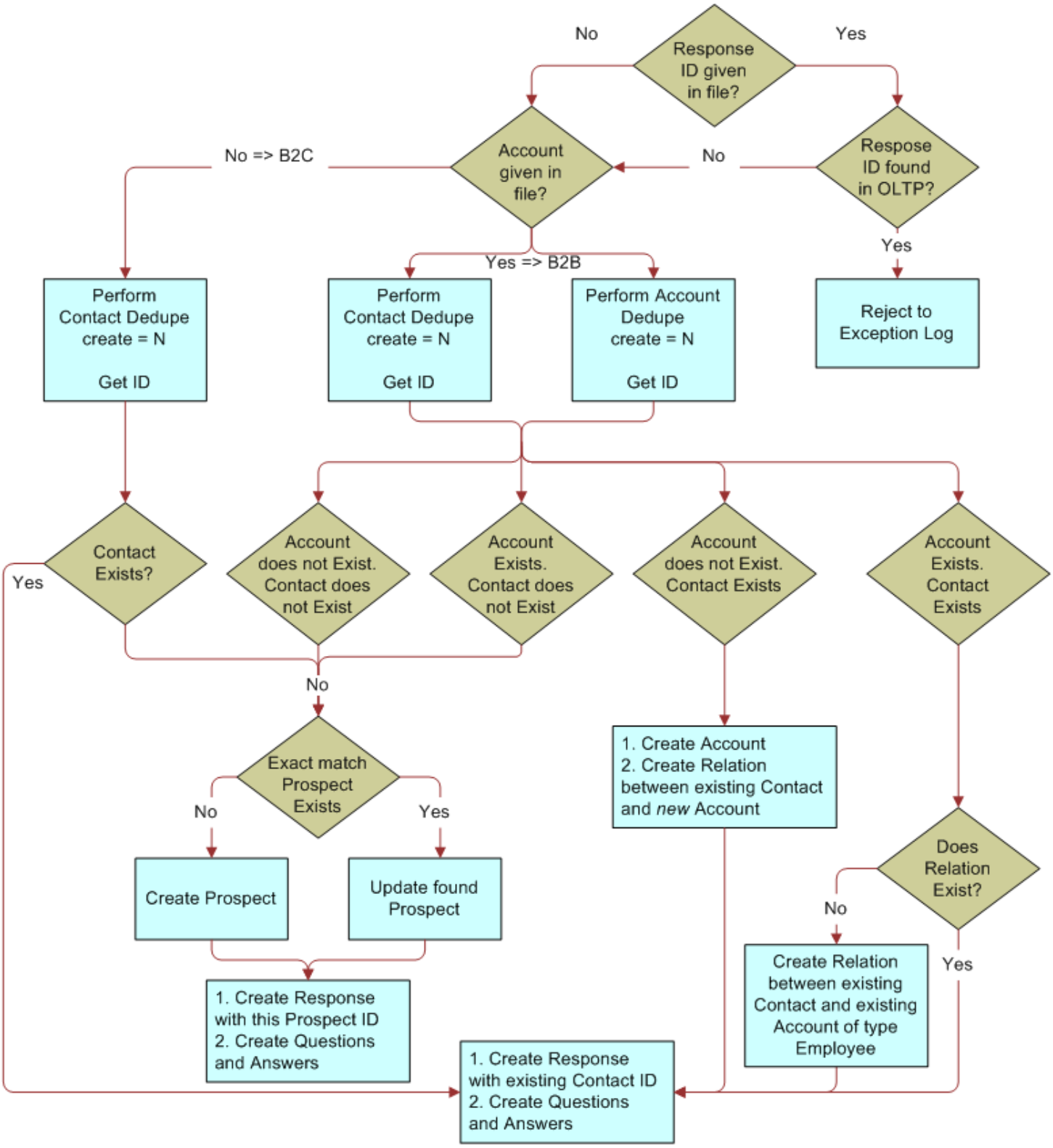


This workflow does the following:

- *Account given in file?.* Verifies whether Account is specified in the file.

- *Perform Contact Dedupe create = N Get ID.* Performs contact deduplication to get ID if contact creation is set to N.
- *Perform Account Dedupe create = N Get ID.* Performs account deduplication to get ID if account creation is set to N.
- *Account does not Exist.* Contact does not Exist. Verifies that account and contact do not exist.
- *Account Exists. Contact does not Exist.* Verifies that account exists but contact does not exist.
- *Exact match Prospect Exists.* Verifies whether exact match prospect exists.
- *Create Prospect.* Creates prospect if exact match prospect does not exist.
- *1. Create Lead with this Prospect ID. 2. Create Response/Questions and Answers, if applicable.* Creates lead with the created prospect ID and creates responses or questions and answers if applicable.
- *Update Found Prospect.* Update process identifies a prospect if the exact match prospect exists.
- *Exact match on Lead Exists?.* Verifies whether exact match on lead exists.
- *Account does not Exist. Contact Exists.* Verifies that exact account does not exist, but contact exists.
- *1. Create Account. 2. Create Relation between existing Contact and new Account.* Creates account if account does not exist and creates a relation between existing contact and the new account.
- *1. Create Lead with existing Contact ID. 2. Create Response/Questions and Answers, if applicable.* Creates lead with an existing contact ID and creates responses or questions and answers if applicable.
- *Account Exists. Contact Exists.* Verifies that both account and contact exist.
- *Does Relation Exist?.* Verifies whether a relation exists between account and contact.
- *Create Relation between existing Contact and existing Account of type Employee.* Creates relation between existing contact and account of type employee if relation does not exist between a contact and account.
- *Exact match on Lead Exists?.* Verifies whether exact match on a lead exists.
- *Leave row in Interface table flagged as duplicate lead.* Mark the lead as duplicate if exact match on lead exists.

The following figure illustrates the response import logic.

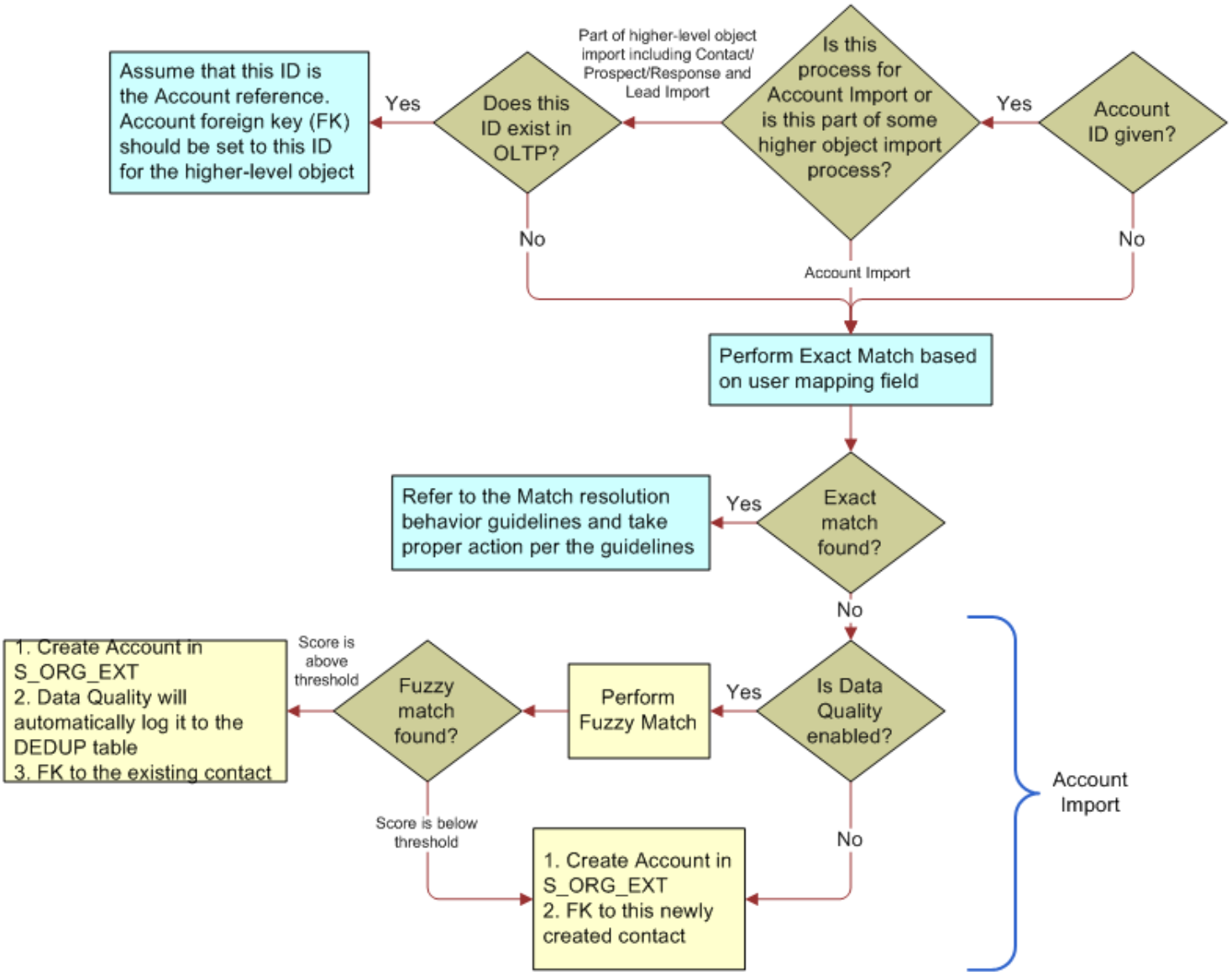


This workflow does the following:

- *Response ID given in file?.* Verifies whether a Response ID is specified in the file.

- *Response ID found in OLTP?.* Verifies whether a Response ID is available in OLTP if the Response ID is specified in the file.
- *Reject to Exception Log.* Adds the Response ID to the exception log as rejected if the Response Id is available in OLTP.
- *Account given in file?.* Verifies whether an Account is specified in the file.
- *Perform Contact Dedupe create = N Get ID.* Performs contact deduplication to get ID if contact creation is set to N.
- *Perform Account Dedupe create = N Get ID.* Performs account deduplication to get ID if account creation is set to N.
- *Account does not Exist. Contact does not Exist.* Verifies that account and contact do not exist.
- *Account Exists. Contact does not Exist.* Verifies that account exists but contact does not exist.
- *Contact Exists?.* Verifies whether contact exists.
- *Exact match Prospect Exists.* Verifies whether exact match prospect exists.
- *Create Prospect.* Creates prospect if exact match prospect does not exist.
- *Update Found Prospect.* Update process identifies a prospect if the exact match prospect exists.
- *1. Create Response with this Prospect ID. 2. Create Questions and Answers.* Creates response with the created prospect ID and creates questions and answers if applicable.
- *1. Create Response with existing Contact ID. 2. Create Questions and Answers.* Creates response with an existing contact ID and creates questions and answers if applicable.
- *Exact match on Lead Exists?.* Verifies whether an exact match on lead exists
- *Account does not Exist. Contact Exists.* Verifies that exact account does not exist, but contact exists.
- *1. Create Account. 2. Create Relation between existing Contact and new Account.* Creates account if account does not exist and creates a relation between existing contact and the new account.
- *Account Exists. Contact Exists.* Verifies that both account and contact exist.
- *Does Relation Exist?.* Verifies whether a relation exists between account and contact.
- *Create Relation between existing Contact and existing Account of type Employee.* Creates relation between existing contact and account of type employee if relation does not exist between a contact and account.

The following figure illustrates the account import logic.

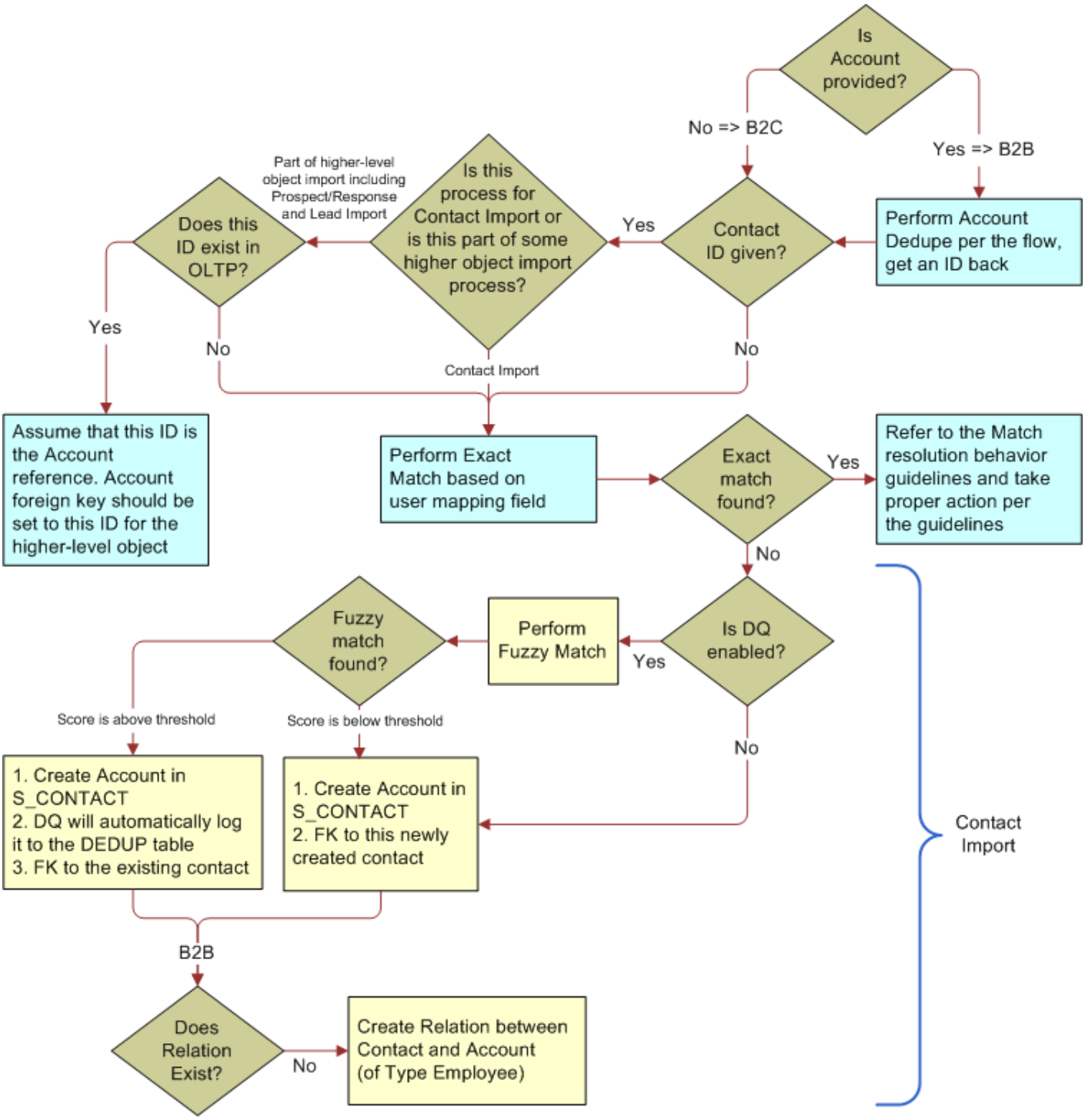


This workflow does the following:

- *Account ID given?.* Verifies whether the Account ID is given.
- *Is this process for Account Import or Is this part of some higher object import process?.* Verifies whether the process is for account import or a part of some higher object import process.
- *Does this ID exist in OLTP?.* Verifies if the Account ID exists in OLTP if the process is part of some higher object import process.
- *Assume that this ID is the Account Reference. Account Foreign key (FK) should be set to this ID for the higher-level object.* Sets the account foreign key to this ID for the higher-level object if the account ID exists in OLTP.
- *Perform Exact Match based on user mapping field.* Tries to find exact match based on user mapping field.
- *Exact match found?.* Verifies whether an exact match is found.
- *Refer to the Match resolution behavior guidelines and take proper action per the guidelines.* Verifies the match resolution behavior guidelines to take proper action if an exact match is found.
- *Is Data Quality enabled?.* Verifies whether Data Quality is enabled.

- *Perform Fuzzy Match.* Performs fuzzy match if Data Quality is enabled.
- *Fuzzy match found?.* Verifies whether the fuzzy match was found.
- *1. Create Account in S_ORG_EXT. 2. FK to this newly created contact.* Creates new account in the S_ORG_EXT table and sets Foreign Key to the newly created contact if the fuzzy match score is below threshold.
- *1. Create Account in S_ORG_EXT. 2. Data Quality will automatically log it to the DEDUP table. 3. FK to the existing contact.* Creates account in the S_ORG_EXT table, logs data quality into the deduplication table, and sets Foreign Key to the existing contact if the fuzzy match score is above threshold.

The following figure illustrates the contact import logic.



This workflow does the following:

- *Is Account provided?.* Verifies whether an Account is given.
- *Perform Account Dedupe per the flow, get an ID back.* Performs account deduplication to get the ID if the account is provided.
- *Contact ID given?.* Verifies whether a contact ID is given.

- *Is this process for Contact Import or is this part of some higher object import process?.* Verifies whether the process is for contact import or is a part of some higher object import process.
- *Does this ID exist in OLTP?.* Verifies if the Contact ID exists in OLTP if the process is part of some higher object import process.
- *Assume that this ID is the Account Reference. Account foreign key should be set to this ID for the higher-level object.* Sets the account foreign key to this ID for the higher-level object if the contact ID exists in OLTP.
- *Perform Exact Match based on user mapping field.* Tries to find exact contact match based on user mapping field.
- *Exact match found?.* Verifies whether an exact match is found.
- *Refer to the Match resolution behavior guidelines and take proper action per the guidelines.* Verifies the match resolution behavior guidelines to take proper action if an exact match is found.
- *Is Data Quality enabled?.* Verifies whether Data Quality is enabled.
- *Perform Fuzzy Match.* Performs fuzzy match if Data Quality is enabled.
- *Fuzzy match found?.* Verifies whether the fuzzy match was found.
- *1. Create Account in S_CONTACT. 2. FK to this newly created contact.* Creates new account in the S_CONTACT table and sets Foreign Key to the newly created contact if the fuzzy match score is below threshold.
- *1. Create Account in S_ CONTACT. 2. DQ will automatically log it to the DEDUP table. 3. FK to the existing contact.* Creates account in the S_ CONTACT table, logs data quality into the deduplication table, and sets Foreign Key to the existing contact if the fuzzy match score is above threshold.
- *Does Relation Exist?.* Verifies whether a relation exists between the contact and account.
- *Create Relation between Contact and Account (of Type Employee).* Creates a relation between the contact and account if a relation does not exist.

Contact List Import Using PL/SQL

Siebel Innovation Pack 2014 Patchset 2 contains an enhancement to the existing contact import functionality that allows you to import greater volumes of contact data in a shorter amount of time. It is built upon procedural language extension to SQL (PL/SQL), which combines database language and procedural programming language. Note that this functionality is only supported for Siebel databases running on the Oracle platform.

The new functionality applies to importing new contacts only and cannot be used to re-import existing contacts. Also, the feature can only be used for contacts, and cannot be used to import other objects associated with Siebel Marketing, such as leads or responses.

About the New List Import Functionality

A new button called Database Import has been added to the Administration - Marketing Import screen to support the new contact list import functionality. Note that the New button is only enabled when the appropriate system preferences have been set, when the import mode has been set to Import New Records and not to Update Existing Records, and when the Source Type value has been set to Text. The import functionality is not supported for XML files.

Importing External Data and Creating Data Mappings

The procedures in this topic describe how to import external data into Siebel Marketing, and how to create and modify data mappings between the imported data and columns in Siebel Marketing tables. For background information about importing external data, see *About Importing External Data*.

Importing External Data

The following procedure describes how to import external data into Siebel Marketing.

To import external data

1. Navigate to the Administration - Marketing screen, then the Import view.
2. In the Import view, create a new record or select an existing job.
3. Click the Job Setup tab, then complete the Job Setup fields.

   The following table describes some of the fields for the load options.

Field	Comment
Source Type	Text or XML, unless you are using the contact list import functionality enhancement that is based on PL/SQL. If so, you must select Text.
Main Object	The destination business object for the imported data. Mappings can only be made to the related objects of the main object. For example, if you are importing leads, then you can only map the available integration components for the main object, such as contact, account, lead, and response information.
Import Mapping	A saved definition of the mapping fields, their sequence, and data type. You can select an import mapping from existing saved mappings, or you can create a new mapping in the Mapping tab of an import job.
Import Mode	Tells the import process whether to follow the procedural logic for new data or updating existing data. Options are Insert new records and Update existing records. Note that if you are using the contact list import functionality that is based on PL/SQL, you must select the Import new records option, because as previously stated, the functionality cannot be used to update existing contacts.
Internal List Name	Specifies the marketing list to which you are adding the imported contacts and prospects.
Match Resolution Guideline	Identifies how to deal with a record when a duplicate is found. Options are: o Create additional record.

Field	Comment
	○ Overwrite existing record. ○ Reject imported record.
Exception File Path	A file path for the location where rejected records will be written.
Max Errors	If the import job exceeds this number of rejected errors, then the entire process is aborted and rolled back. Default value is 100.
Lead Lookback Period	Determines the time range (in days) in which to search for duplicates.

The following table describes some of the fields for the source file.

Field	Comment
File Selection	Specifies the source file. Options are: ○ Use exact filename. With this option, the File Name field on the form becomes editable. Note that if you are using the contact list import functionality that is based on PL/SQL, you must select the "Use exact filename" option. ○ Use most recent file. Allows for recurring import jobs. If you have previously imported data by selecting the Use exact filename option, then you can then select this option to import data from the most recent version of the same source file for subsequent data import jobs.
File Name	Can be an exact name or simply a path to the directory where the source file exists. This allows an automated daily import that generates a similar file name, but appends a different date or extension.
Data Type	Options are comma separated, tab delimited, other delimiter, fixed width, or XML. Note that if you are using the contact list import functionality that is based on PL/SQL, you must select either the comma separated option or another delimiter option.
Delimiter	If the data type of the source file is Other Delimiter, then you must enter a character. Otherwise, this field is not editable. Tab delimited and CSV data types are automatically handled.
Header Row Included	Check this field if the file includes a header row. Note that if you are using the contact list import functionality that is based on PL/SQL, you must not check this field.

Field	Comment

The following table describes some of the fields for the scheduling options.

Field	Comment
Schedule Mode	Options are One time (manually started), One time (scheduled), and Repeating (repeat frequency).
Schedule Status	Options are: o Not scheduled: Job is not activated or running o Running: An import is currently in progress o Scheduled: Repeating job is activated but not currently running
Repeat Unit	Hours, days, weeks, months.
Next Schedule Date	A calculated field that computes the next iteration of the import job.

4. In the Import Mapping field, select a mapping between the input data columns and the Siebel Marketing table columns.
5. In the Data Mapping applet, create a new mapping.
6. When you have completed the mapping definitions, click the Validate button.

   Siebel Marketing verifies that the definitions for the objects included in the mapping conform to the related business component or business object rules.

   For example, the Name column is a user key column for the Account business object. Therefore, the Name field must be defined in the mapping for the Account import object. If this field is not included in the mapping definition, then an error is displayed when you click the Validate button.

   > **Note:** The following step is only required if you are using the Marketing Contact List Import functionality using PL/SQL. If you are not using this feature, you do not need to perform the step.

7. Once the mapping definition is complete and all of the fields necessary for the job have been set up, click the Database Import button to import the data file that contains the list of contacts to the IMPORT_DIR directory on the database directory.

Creating and Modifying Data Mappings

The following procedure shows how to create and modify data mappings.

To create and modify data mappings

1. Navigate to the Administration - Marketing screen, then the Import Mappings view.
2. Select a mapping to modify, or create a new one.
3. Complete the fields for the mapping. The following table describes some of the fields.

Field	Comment
Column Width	Number of characters. Used for fixed width files.
Allow Field Updates	Indicates whether the field can overwrite the value on a matching record. For example, if a matching contact is found with an existing phone number, then checking this option permits the phone number field to be updated.
Required Fields	Indicates if the field is required (non-nullable).
Ignore Field	Ignores a column during import.
Exact Match Column	Indicates if the field will be used as part of the exact match key in the parent business component.

Process of Creating and Managing Internal Lists and Subscription Lists

List Management creates lists of contact and prospect records stored within your applications. Internal lists are created within the List Management module by querying existing contact or prospect records in the database.

After you have created these lists, you can reuse the list any number of times for campaigns. Lists are used by Siebel Marketing and Siebel Campaigns. You can use lists in List Management to serve as subscription lists for Email campaign.

To create and manage internal lists, perform the following tasks:

1. *Associating Prospect Lists in Siebel Marketing*
2. *Creating Internal Lists*
3. *Adding Prospects or Contacts to Internal Lists*
4. *Creating Lists of Prospects Using Additional Attributes*
5. *Creating and Managing Subscription Lists*

Note: For more information about managing lists, see the chapter on global target list management in *Siebel Applications Administration Guide* .

Associating Prospect Lists in Siebel Marketing

Marketing campaigns can include prospects using one of the following approaches:

- Associating an internal list of prospects with the campaign.
- Associating a segment from the Marketing segmentation module where the campaign load list format is configured to load the Marketing Prospect integration object.

Associating an Internal List with a Campaign

The following procedure shows how to associate an internal list with a campaign.

To associate an internal list with a campaign

1. Navigate to the Campaigns screen, then the Campaign List view.
2. Click the campaign Name.
3. Click the Design tab.
4. In the Design link bar, click Segments/Lists.
5. Click Add List to associate an internal list.

   To associate more lists, repeat Step 5.
6. After the desired lists are associated, click the menu on the upper campaign form and choose Load Campaign to associate the members of the list to the campaign.
7. Pick a time and date for the load request, and click OK.

Associating a Segment of Prospects with a Campaign

The following procedure shows how to associate a segment of prospects with a campaign.

To associate a segment of prospects with a campaign

1. In the Marketing Module, create a segment. Make sure that the Campaign Load List Format for the segment is configured to load data into the Marketing Prospect integration object.
2. Navigate to the Campaigns screen, then the Campaign List view.
3. Click the campaign Name.
4. Click the Design tab.
5. In the Design link bar, click Segments/Lists.
6. Click Add Segment to associate the segment.

   If the segment has never been used in a campaign previously, then click Choose a new segment, and select the segment from the folder location where you saved it.
7. To associate more segments, repeat Step 6.
8. After the desired segments are associated, click the menu on the upper campaign form, and choose Load Campaign to associate the members of the segment with the campaign.

9. Pick a time and date for the load request, and click OK.

The following table describes how prospects and contacts can be used in segments associated with campaigns.

Scenario	Data Source	Integration Object	Comments
Segment contains only contacts	Siebel OLAP or Siebel OLTP	Marketing Contact	Fully supported. Contacts exist in the Siebel transactional database, so data is inserted only into the S_CAMP_CON table.
Segment contains only contacts	Non-Siebel database	Marketing Contact	Fully supported. New contacts and accounts (if mapped) are created in the Siebel transactional database.
Segment contains only prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON.
Segment contains only prospects	Non-Siebel database	Marketing Prospect	Fully supported. New prospects are created in the Siebel transactional database.
Segment contains contacts and prospects	Siebel OLAP or Siebel OLTP	Marketing Person	Fully supported. Contacts and prospects exist in the Siebel transactional database, so data is inserted only into S_CAMP_CON and S_DD_USER_KEY tables.
Segment contains contacts and prospects	Non-Siebel database	Not applicable	Currently not supported.

Creating Internal Lists

The contacts or prospects you target for each campaign vary depending on the campaign objective. For example, you might want to select the contacts who have a certain job title or live in a specific ZIP or Postal Code. In another campaign, you might want to combine sets of contacts or prospects that were selected by several different criteria into a single list.

You create an internal list of contacts or prospects in the List Management screen using the Contacts or Prospects view. You can also use these views to add contacts or prospects to existing lists.

> **Note:** To create an internal list, your employee login must have a responsibility associated with it that includes the List Management views.

You can reuse lists in any number of campaigns or marketing programs.

The following procedure shows how to create an internal list of contacts or prospects.

To create an internal list of contacts or prospects

1. Navigate to the List Management screen, then the Contacts or Prospects view.
2. In the Contacts or Prospects list, select the individuals that you would like to include, or perform a query to find this information.
3. After you receive the results of your query, you can select any number of the records for inclusion in the list.
4. With the desired records selected, click Add to List.
5. In the Pick List dialog box, click Create New List.
6. In the second Pick List dialog box, enter a name for the list, and click OK.
7. In the Pick List dialog box, select the list you created and click OK.
8. To display the new list, in the List Management link bar, click Lists.

Note: The list type is defaulted to Internal. You can rename the list to give it a more appropriate reference name or type at any time.

Adding Prospects or Contacts to Internal Lists

Adding to an existing internal list is similar to creating a new internal list. You can use Add to List to attach prospects to a list of type Internal, D&B, or Imported. You can attach prospects from the All Prospects list or the Prospects by Category list.

The following procedure shows how to add contacts or prospects to an internal list.

To add contacts or prospects to an internal list

1. Navigate to the List Management screen, then the Contacts or Prospects view.
2. In the Contacts or Prospects list, select the individuals to include or perform a query to find this information.

   After you receive the results of your query, you can select multiple records for inclusion in the list.
3. With the records selected, click Add to List.
4. In the Pick List dialog box, select the appropriate list, and click OK.
5. To display the new list, in the List Management link bar, click Lists.
6. Select the appropriate list, and click the list name.
7. Click the List Contacts and Prospects view tab to verify that your selected contacts or prospects have been added.

Creating Lists of Prospects Using Additional Attributes

You can create lists of prospects by querying the additional attribute data for prospects. For example, you can create an additional attribute for hobby and then record these values for many of your prospects. For a campaign, you might want to create a list of prospects with certain hobbies, such as sailing or painting.

You can create a list of prospects by using the Prospects by Category list. In this list, the New Internal List and Add to List functions are also available. Query the list of prospects using the appropriate attribute and attribute value. Then, select the desired records and either create a new list or add to an existing list.

Due to the many-to-many relationship between prospects and attributes, you cannot have multiple combinations of attributes and values in a single query. To create of a list that combines queries, for example, Hobby is set to Skiing OR Preferred Language is set to Spanish, perform separate queries, and use the Add to List function to combine the results.

Creating an Internal List of Prospects Using Attributes

The following procedure shows how to create an internal list of prospects using attributes.

To create an internal list of prospects using attributes

1. Navigate to the List Management screen, then the Prospects by Category view.
2. In the Prospects by Category list, select one or more prospects to include in your internal list.
3. With the desired records selected, click Add to List.
4. In the Pick List dialog box, click Create New List.
5. In the second Pick List dialog box, enter a name for the list, and click Save.
6. In the Pick List dialog box, select the list you created, and click OK.
7. To display the new list, in the List Management link bar, click Lists.

Adding to an Internal List Using Prospect Attributes

The following procedure shows how to add to an internal list using prospect attributes.

To add to an internal list using prospect attributes

1. Navigate to the List Management screen, then the Prospects by Category view.
2. In the Prospects by Category list, select the prospects that you would like to include in your internal list, or perform a query if necessary.

   After you receive the results of your query, you can select any number of the records for inclusion in the list.
3. With your desired records selected, click Add to List.
4. In the Pick List dialog box, select the appropriate list, and click OK.
5. To display the new list, in the List Management link bar, click Lists.
6. Select the appropriate list, and click the list name.
7. Click the List Contacts and Prospects view tab to verify that your selected contacts or prospects have been added.

Creating and Managing Subscription Lists

You can use lists in List Management to serve as subscription lists for Email campaigns. A *subscription list* is a set of contacts or prospects who have indicated that they want to receive communications about a certain topic. After creating a subscription list, you can associate the list with an email offer. Any responses to Subscribe or Unsubscribe from List then adds and removes members from this list.

Before you can create a subscription list, create an internal list of contacts, prospects, or both using one of the following methods:

- The Add to List button in the List Management views
- The Create Target List feature (Siebel Industry Applications only)
- EIM or other custom configuration

Creating a Subscription List

The following procedure shows how to create a subscription list.

To create a subscription list

1. Navigate to the List Management screen, then the Lists view.
2. Find the list you created.
3. Change the Type to Subscription.

Associating a Subscription List with an Email Offer

The following procedure shows how to associate an existing subscription list with an email offer.

To associate a subscription list with an email offer

1. Navigate to the Offers screen, then the Email Treatments view.
2. Select or query for an email offer to associate with a subscription list.
3. In the Subscription List field, click the single select button to choose a subscription list.

Promotion of Prospects to Contacts

When a prospect satisfies a set of screening criteria, he or she can be promoted to become a contact. The new contact record contains the same name and address information as the prospect record. The additional attribute data associated with the prospect is promoted to categories and category values for the new contact.

> **Note:** You can have duplicate contacts in the same account. For example, duplicate contacts from different companies might belong to the same account.

When you promote a prospect, the application checks for the following items:

- List Management confirms whether Data Quality deduplication is enabled. If so, the promotion matches the prospect against existing contacts. If a match is found, then a pop-up window appears showing the matching contacts. You can then pick or ignore the matches and proceed with the promotion:
  - If the user chooses an existing contact from the pop-up window, then the prospect record is marked as Promoted and its associations with any campaigns, lists, or responses are linked to the selected contact.
  - If the user ignores all matches in the Pop-up Window, then the promotion continues as if no match was detected.
- If Data Quality finds no matching contact or Data Quality is not enabled, then the promotion checks whether the combination of the Account Name and Account site fields matches an existing account record.
- If the combination of the Account Name and Account Site fields match an existing account record, then one of the following occurs:
  - If the account name exists but the account site is empty, then the promotion compares with existing accounts that have the same Account Name and Account Site. If an identical account exists, then the promotion links the contact to the existing account. For the prospect address fields, either an update or an insert on the Account Address is performed, based on the combination of Street Address, City, and State (Industry Applications also use Postal Code as well). If there is not a match with an existing account, then a new account is created and the prospect personal address becomes the account address.

- If no account location or account name is specified, then an account is not created or associated with the promoted prospect. The prospect personal address becomes the contact personal address.

Promoting Single or Multiple Prospects

You can promote a single prospect or multiple contacts, using the Prospects More Info view or the views in the List Management screen. You can promote multiple prospects using the Promote Many button in some views in the List Management screen. This action promotes any prospects for which Data Quality does not find any matches.

> **CAUTION:** Promotion is only intended for promoting relatively small numbers of prospects at one time (fewer than 100). If you select more prospects, then the process could take many minutes to complete. To see the promotion result, you must query repeatedly until the process completes.

Prospects that have at least one matching contact are not promoted when you click Promote Many. If you do not enable Data Quality, then selected prospects are promoted to contacts.

When a prospect is promoted, a contact record is created with matching field information. The prospect remains in the list of prospects, but is flagged as being promoted.

Promoting a Single or Multiple Prospects (Prospects More Info View)

The following procedure shows how to promote a single or multiple prospects using the Prospects More Info view.

To promote a single or multiple prospects using the Prospects More Info view

1. Navigate to the List Management screen, then the Prospects view.
2. Use one of the following methods to promote prospects:
   - In the Prospects list, select a prospect record, and click Promote.
   - To promote multiple prospects, select the prospect records to promote, and click Promote Many.

Promoting a Single or Multiple Prospects (List Management Views)

The following procedure shows how to promote a single or multiple prospects using the views in the List Management screen.

To promote a single or multiple prospects using the views in the List Management screen

1. Navigate to the List Management screen, then the Lists view.
2. Click the list name.
3. Click the List Contacts and Prospects view tab.
4. Use one of the following methods to promote prospects:
   - In the Contacts and Prospects list, select a prospect record, and click Promote.
   - To promote multiple prospects, select the prospect records to promote, and click Promote Many.

Promoting a Prospect to an Opportunity (Campaigns Screen Views)

The following procedure shows how to promote a prospect to an opportunity using views in the Campaigns screen.

To promote a prospect to an opportunity using views in the Campaigns screen

1. In Navigate to the Campaigns screen.

2. In the Campaigns list, select a campaign.
3. Click the Overview view tab.
4. In the Overview list, select a prospect record, and click Create Opportunity.

About Promoting a Prospect's Response to an Opportunity

A prospect that responds to a campaign offer can be promoted by promoting the response to an opportunity in the Responses screen. For more information, see *Promoting Responses to Opportunities*.

Promotion Map Modifications

List Management provides a default path for information to move from the prospect record to the contact record during promotion. Prebuilt maps specify where in the contact record prospect fields are copied when a prospect is promoted. List Management provides three prebuilt maps for moving prospect information during promotion. The following table contains prospect information.

Map Name	Information Promoted	Source Business Component	Destination Business Component
LM Contact Map	Contact related information such as First Name, Email Address, and Job Title	List Mgmt Prospective Contact	Contact
LM Account Map	Account related information such as Annual Revenue and Line of Business	List Mgmt Prospective Contact	Account:List Mgmt Prospective Contact
LM Business Address Map	Business Address information such as City, Country, and Postal Code	List Mgmt Prospective Contact	Business Address

Using Siebel Tools, you can redirect any of these prospect fields to a field associated with another business component. For example, you might decide that you do not want to use the Alias field for the prospect and would like it to hold some other information such as a Back Office Account ID. You might also want to promote that ID to populate a specific field on the contact record, possibly an extension column added to your implementation. To view or change the promotion map, in Siebel Tools, navigate to the Business Components screen, List Mgmt Prospective Contact, and then Business Component User Properties.

You can display the destination business component by looking under Business Component User Properties for the List Mgmt Prospective Contact and searching for the Map Name in the Name column. The path for the map is displayed as Destination Business Component: Source Business Component. For example, Contact: List Mgmt Prospective Contact.

In this case, all three default maps use the List Mgmt Prospective Contact business component as the source.

To modify the promotion map, you can change a user property in the map to promote the information to a different field in the Destination Business Component for the map.

Alternatively, if you want to promote user properties to a destination business component other than the three default maps, then you could create a new map for those user properties.

Modifying Map Entries

To insert or modify a map entry, first determine which map to use for a given set of source and destination fields. Then add an entry using the following syntax:

```
Name: Promotion Map:[Destination Integration Component].[Field Name of Destination
Integration Component]
Value: [Field Name of Source Integration Component]
```

- **Map Name.** The name of the map specified under the corresponding row in the Business Component User Properties.
- **Destination Field.** Field in the Destination Business Component to receive source data. The Destination Business Component is map specific but configurable.
- **Source Field.** Field in the Source Business Component from which to extract data. Source Business Component is map specific but configurable. For example:

```
Name: Promotion Map.Contact.First Name
Value: First Name
```

Each map only works with a specific source and destination Business Component. However, you can make copies of the Business Components and rename them.

To modify the source and destination Business Components of these mappings, modify the following Business Component User Prop:

```
Name Column: [Map Name]
Value Column: [Destination Business Component]:[Source Business Component]
```

Process of Viewing and Maintaining Lists

A list in Siebel Marketing is a group of contact or prospect records in the Siebel database.

To view and maintain lists, perform the following tasks:

1. *Displaying Lists of Contacts or Prospects*
2. *Deactivating or Deleting Lists*
3. *Removing Prospects or Contacts from Lists*

Displaying Lists of Contacts or Prospects

You can view the list members and details about them in several ways. If you know the name of the list, then you can start at the Lists view. To display other lists a contact or prospect might be on, you can also start at the Contacts or Prospects List view.

Displaying a Contact or Prospect List from the Lists View

The following procedure shows how to display a contact or prospect list from the Lists view.

To display a contact or prospect list from the Lists view

1. Navigate to the List Management screen, then the Lists view.
2. In the Lists list, select the list record.
3. Click the list name.

   The List Contacts and Prospects view appears. This view shows the contacts or prospects on the list you selected. If the Contact column is checked, then the person is a contact. In addition, the person's name appears either in the Contact Last Name or Prospect Last Name column to further identify if the person is a contact or prospect.
4. Click the Last Name, and one of the following views appears:
   - If you clicked a Contact name, then the Contacts List view appears, with the Activities view tab selected.
   - If you clicked a Prospect name, then the Prospects view appears in the List Management screen, with the More Info view tab selected.

Displaying Contact or Prospect Information from the Contacts or Prospects Lists View

The following procedure shows how to view contact or prospect information from the Contacts or Prospects List view.

To view contact or prospect information from the Contacts or Prospects List view

1. Navigate to the List Management screen, then the Lists view.
2. From the List Management link bar, click Contacts or Prospects.

   Depending on which you chose, the Prospect List view or Contact List view appears.
3. Select the record of the Contact or Prospect you are interested in.
4. Click the Last Name, and one of the following views appears:
   - If you clicked a Contact name, then the Contact Detail view appears, with the Activity view tab selected.
   - If you clicked a Prospect name, then the Prospective Contact Market Segment view appears, with the Prospect Additional Attributes view tab selected.

Deactivating or Deleting Lists

You can deactivate or delete lists using the following procedures.

Deactivating Lists

Many times lists are acquired from outside sources such as other companies, Web sites, and events such as seminars and trade shows. Because this data typically represents prospective customers who are not active customers, you might want to deactivate any remaining prospects who have not been promoted to contacts. Additionally, lists can be generated by different users for a specific campaign or business situation, so you might want to keep lists active only for a specified period of time.

The following procedure shows how to deactivate a list.

To deactivate a list

1. Navigate to the List Management screen, then the Lists view.

2. In the Lists list, select a list to deactivate.
3. In the Lists form, change the status to Inactive, or set the expiration date.
   The expiration date is an information-only field and does not affect your use of the list.

Deleting Lists

This action deletes the list as well as the association with any contact or prospect records.

> **Note:** Deleting a list does not delete the contact or prospect records, only the association between the list and contact or prospect records.

The following procedure shows how to delete a list.

To delete a list

1. Navigate to the List Management screen and select the Lists view.
2. In the Lists list, select a list to delete.
3. Click the menu button and choose Delete Record.

Removing Prospects or Contacts from Lists

You can remove prospects or contacts from lists using the following procedures.

Removing Prospects from Lists

A prospect cannot be removed from a list using the List Contacts and Prospects view, because the prospect might appear on more than one list. You have more control over individual prospect lists when you remove the association between the prospect record and its list. If you remove the list associations for a prospect, then the prospect record is deleted.

The following procedure shows how to remove a prospect from a list.

To remove one or more prospects from a list

1. To remove an individual prospect from a list, navigate to the List Management screen, then the Lists view.
2. Click the list name.
3. Click the List Contacts and Prospects view tab.
4. In the List Contacts and Prospects list, select a record to remove, and click the first or last name of the prospect.
5. Click the Prospect Lists tab.
6. In the Prospect Lists list, select and delete the list or lists from which to remove the prospect.
   If you select and delete all of the lists, then the prospect record is also deleted.
7. You can also purge all prospects from a list using the following procedure.

   > **Note:** The contact records that remain in a purged list do not load into campaigns. Do not associate a purged list with a campaign.

   a. Navigate to the List Management screen, then the Lists view.
   b. In the Lists list, select the list record.
   c. In the lower form, click Purge List.
   d. When the confirmation dialog appears, click OK, and then click OK again to submit the request.

e. This action removes all prospects where the Promoted By and Promoted Date are NULL (indicating they have never been promoted).
f. To confirm the prospects were deleted, drill down on the name of the list in the upper list applet, and go to the List Contacts and Prospects view tab.

Removing Contacts from Lists

Contacts can be removed from all lists, but the Contact record remains in the database.

The following procedure shows how to remove a contact from a list.

To remove a contact from a list

1. Navigate to the List Management screen, then the Lists view.
2. Click the list name.
3. Click the List Contacts and Prospects view tab.
4. In the List Contacts and Prospects list, delete the record.

Integrating List Management with D&B

List Management can be used in conjunction with Siebel Dun & Bradstreet (D&B) Integration Solution to generate lists of prospects from the D&B dataset. Within Siebel Dun & Bradstreet Integration Solution, you can perform a query on D&B accounts and generate a list of prospects from the results of the query. These prospects can then be targeted in a campaign and promoted to active contacts.

List Management uses the D&B D-U-N-S number to provide data consistency throughout this process. The D-U-N-S number is associated with prospects derived from the D&B data. After a D&B prospect is promoted to a contact, the D-U-N-S number is used by the D&B update routine to continually refresh the data for those new contacts and their associated account information.

Viewing Account Data for D&B Prospects

The account related to a D&B prospect might already exist as a Siebel account. You can use the following procedure to view account information after you promote an account from a D&B account to a Siebel account.

To view the account information for a D&B prospect

1. Navigate to the List Management screen, then the Lists view.
2. In the Lists list, click the D&B list name.
3. In the List Contacts and Prospects list, click the name in the Prospect Last Name field.

   Note: Make sure you select the Prospect Last Name and not the Contact Last Name.

4. Click the More Info view tab.
5. In the Prospects list, click the Matched Account Name.

   If there is no matching account name, then the field is blank.

Promotion of D&B Prospects

When you promote a D&B prospect to a contact, promotion checks if a Siebel account with the same D-U-N-S number exists and the following actions occur:

- If a Siebel account exists with that D-U-N-S number, then the promotion proceeds according to the standard promotion process in *Promotion of Prospects to Contacts*. After the promotion, any other prospects from that same D&B account are removed from the list.
- If there is no Siebel account with that D-U-N-S number, then the application invokes the D&B account promotion, which then promotes the account and its associated contacts, industry information, and other information. For more information, see the D&B chapter in *Siebel Applications Administration Guide* .

Note: List Management does not promote a prospect with an invalid D-U-N-S number. A D-U-N-S number is considered invalid if it is not contained in the D&B Accounts table.

10 Creating and Using Leads

Creating and Using Leads

This chapter describes the leads object. It includes the following topics:

- *About Creating and Using Leads*
- *Process of Creating, Modifying, and Qualifying Leads*
- *About Creating Leads from Social Media Data*

About Creating and Using Leads

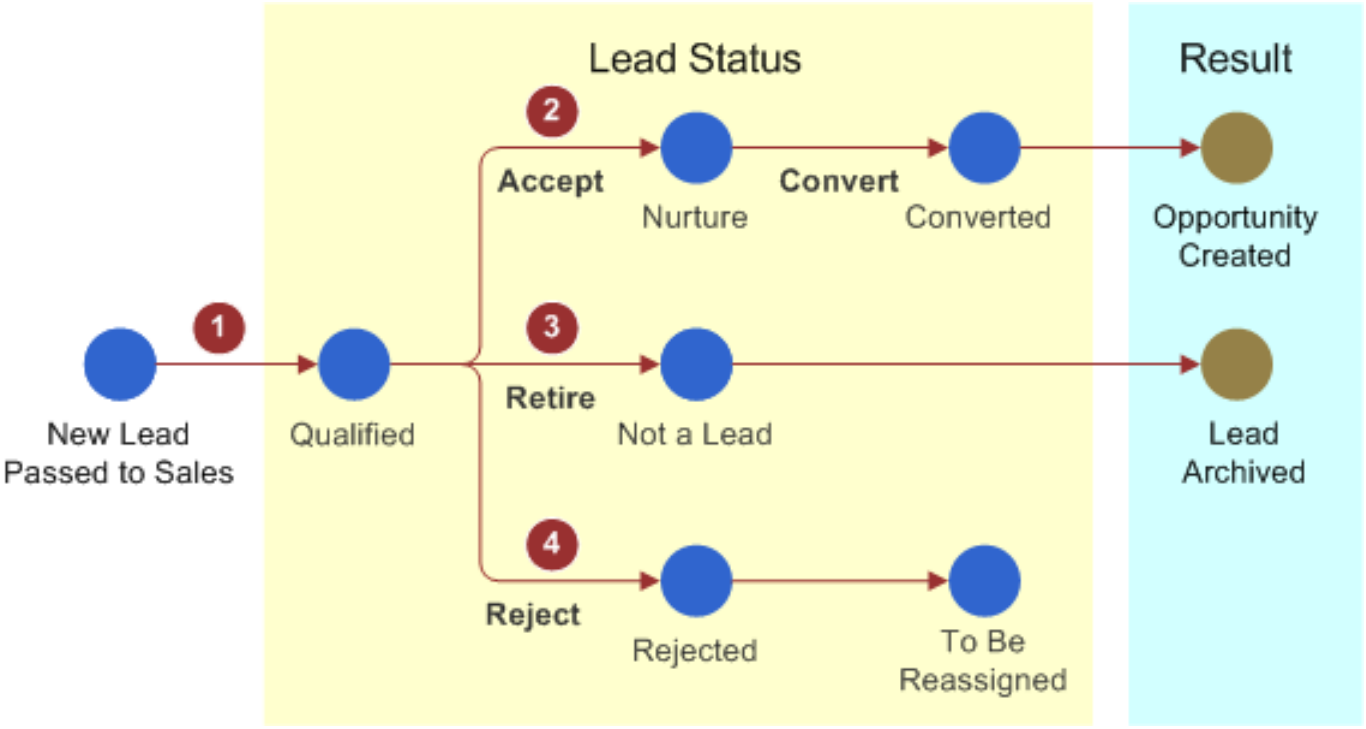
A lead is a new prospect or existing customer who might become an opportunity. A marketing organization plans and executes marketing programs with the objective of capturing and generating leads. Once a lead is created or imported, a sales representative must qualify the lead so that the sales organization can concentrate on the most profitable leads. The sales organization can distribute the leads to the appropriate sales people, using rules that match the geography of the lead and the geography of the sales person. The sales person can accept or reject the lead based on its potential ROI, and convert an accepted lead to an opportunity.

Leads typically have limited information such as name, company information, product interest, and survey response information. For information on Web services that allow operations involving leads, see Siebel CRM Web Services Reference. For more information on importing leads, see *About Importing External Data*.

The life cycle of a lead, illustrated in the following figure, is as follows:

1. A new lead passes from the Marketing application to Sales, where it is qualified and assigned to a sales representative.
2. The sales representative can accept the lead and work on it (with the objective of converting it to an opportunity).
3. The sales representative can retire the lead and archive it.
4. The sales representative can reject the lead and reassign it to someone else.

The following figure illustrates the life cycle of a lead.



For information on importing leads, see *About Importing External Data*.

Process of Creating, Modifying, and Qualifying Leads

To create and modify leads, perform the following tasks:

1. *Creating and Modifying Leads*
2. *Qualifying Leads*
3. *Converting Leads*

Creating and Modifying Leads

This task is a step in *Process of Creating, Modifying, and Qualifying Leads*.

The following procedure shows how to create or modify a lead.

To create or modify a lead

1. Navigate to the Leads screen.
2. In the All Leads list, create a record, or select a lead to change.
3. Complete the fields.

   The Description field is required.

4. To add detailed information to the lead, click the lead, then select the Lead Details view tab.

   Complete the fields using the following table as a guide.

Field	Comment
Lead Referrer	The partner who referred the lead.
Lead Status	The default program status is Unqualified. Options are Accepted, Qualified, To be reassigned, Existing opportunity, Nurture, Converted, Rejected, and Retired.
Organization	Click the Organization select button, and select the predefined organization to be responsible for the program. An organization that you assign to a program is inherited by campaigns in that program.

Qualifying Leads

A qualified lead is one that has been accepted, retired, or rejected. To accept a lead means that a sales person can continue to work with the lead, with the objective of converting it to an opportunity. To retire a lead is to designate it as not being a lead at all. A retired lead can be archived for future reference. To reject a lead means that it will be assigned to someone else. Changes in lead status are tracked in the Lead Status field and its associated date fields.

This task is a step in *Process of Creating, Modifying, and Qualifying Leads*.

The following procedure shows how to qualify a lead.

To qualify a lead

1. Navigate to the Leads screen, then the All Leads view, and select a lead.
2. In the Lead Details form, select a value in the Lead Status field, for example, Accepted. Alternatively, click the Convert, Reject, or Retire buttons.

Converting Leads

Once a lead has been accepted by changing the value of the Lead Status field to Accepted in the Lead details form, it can be converted. Converting a lead results in the creation of a new opportunity, a new contact, or a new account. The following procedure describes how to convert a lead.

This task is a step in *Process of Creating, Modifying, and Qualifying Leads*.

To convert a lead

1. Navigate to the Leads screen, then the All Leads view, and select a lead.

2. In the Lead Details form, click the Convert button.

   If the lead is associated with a prospect, then you must promote the prospect to a contact before the lead can be converted.

When the lead is converted, the Date Converted timestamp is updated. The following lead attributes are copied to the new record:

- Contact name and other contact header record information
- Address
- Associated products
- Associated public notes
- Associated team members

Converting a lead can have one of the following results:

- If the conversion creates a new opportunity, then the associated team members are copied with the same primary team member. If the conversion links to an existing opportunity, then the team members are added to the opportunity, but the primary team member for the opportunity does not change.
- If the conversion process creates a new contact, then the address becomes the contact personal (primary) address. If the convert process links to an existing contact, then the address becomes another personal address but not the primary address.
- If the convert process creates a new account, then the address becomes the account's primary address. If the conversion process links to an existing account, then the address becomes a secondary account address (but not the primary).

Contact Additional Attributes (categories) are one-to-many child records for fields that do not exist in the contact or account schema. For example, the incoming data might have a Favorite Hobby field for the contact, but no field is available. You can populate an Additional Attribute to create a child record under the contact. Similar functionality exists for accounts.

Note: You can convert groups of responders to leads in the Program Flow designer. For additional information, see *Applying Lead Creation to a Program*.

About Creating Leads from Social Media Data

You can integrate Siebel Marketing with Oracle Social Relationship Management (Oracle SRM) cloud services to capture leads from information provided by individuals on social platforms, such as Facebook, and to make Siebel Marketing campaign data available to Oracle SRM cloud services. This topic provides an overview of the Siebel Web services that enable this integration.

The following Web services can be used to integrate Siebel Marketing with Oracle SRM cloud services:

- CreateLeads Web service

  The CreateLeads Web service is used to create leads in Siebel Marketing from information about an individual gathered by Oracle SRM cloud services from social posts, social forms, and other social interactions. When creating a lead using data about an individual derived from social networking sites, the CreateLeads Web service performs the following steps:

a. Checks if a Siebel contact record exists for the individual in Siebel Marketing and, if it does not, creates a new contact record.

   - Creates a social media profile for the Siebel contact, if a social media profile does not already exist.

     Social media profile information can be viewed by navigating to the Contacts tab, selecting the new contact from the Contacts list, then selecting the Social Profile tab.
   - Creates a lead for the Siebel contact, if a lead for the contact does not already exist.

b. If social post information is passed from the Oracle SRM cloud service for the new lead, then this data is stored in Siebel Marketing. This information can be viewed by navigating to the Leads tab, selecting the new lead, then selecting the Social Media tab.

- GetCampaigns Web service

  The GetCampaigns Web service is used to retrieve information about specific campaigns defined in Siebel Marketing and to make this information available to Oracle SRM cloud services. You can then associate the campaign with online surveys or forms created in the Oracle SRM service, which allows leads created from the survey or form data to be associated with the Siebel Marketing campaign.

For detailed information on the GetCampaigns Web service and the CreateLeads Web service, see *Siebel CRM Web Services Reference* and *Siebel CRM Social Media Guide* .

11 Setting Up and Using Web Marketing

Setting Up and Using Web Marketing

This chapter describes how to set up and use Oracle's Siebel Web Marketing. It includes the following topics:

- *About Siebel Web Marketing*
- *Web Marketing and Web Site Visitors*
- *Requirements for Installing Siebel Web Marketing*
- *Control of User Access to the Web Marketing Web Site*
- *Default Responsibilities and Users for Web Marketing*
- *Assigning Default Campaigns and Default Offers*
- *Use of Siebel Personalization with Web Marketing*
- *Customization of the Web Marketing User Interface*
- *About Web Surveys and Landing Sites*
- *Extending Survey Field Mapping*

About Siebel Web Marketing

Siebel Web Marketing is an optional Siebel Marketing module that provides you with the tools and templates to manage and execute Web-based marketing. It provides the Web site visitor with a method of viewing a Web offer, downloading literature, and using preconfigured Web response forms to request more information or request contact by telephone.

You can modify the look and feel of Web Marketing to match your existing Web site. Siebel Web Marketing Web sites can be deployed in more than one language.

Web Marketing and Web Site Visitors

A Web site visitor can navigate to the Web Marketing home page by entering the URL in a browser or by clicking a hyperlink on another Web page. At this point, the visitor to the Web page is anonymous and can choose to register, log in (with an existing user name and password), or continue to navigate anonymously. When an anonymous visitor arrives at the Web Marketing home page, the default campaign offers and the details for the first offer in the Featured Offers list appear. If the visitor registers or logs in, then the visitor sees other campaign offers for which he or she is eligible. For more information about default offers and default campaigns, see the description of featured offers in *Web Marketing Offers Page*.

If a contact logs in using the contact's user ID and password, then any responses generated by this customer are tagged with the customer's account ID and with the associated campaign ID. For more information about setting up users, see *Default Responsibilities and Users for Web Marketing*.

Web site visitors can also navigate to the Web Marketing site by clicking an embedded URL from within an email offer. Only contacts or prospects receive these offers. When an email contact or email prospect clicks an embedded URL, the Web Offer page for this offer appears. Any responses to the offer from this contact or prospect are tagged with the associated campaign ID and offer ID, so marketers can track response rates for specific campaigns. For a list of responses that are captured, see *Response Management*.

Visitors to your Web Marketing home page are categorized as follows:

- *Anonymous Visitor*
- *Email Contact*
- *Email Prospect*
- *Logged-In Contact*

Anonymous Visitor

Any visitor can enter the Web Marketing URL into a Web browser and navigate to your Web Marketing home page. This visitor does not see a personalized Welcome message and responses are not captured when the visitor clicks a Recommended Product link or downloads literature. However, an anonymous visitor can create a product information or call response by clicking the Send Product Information or Request a Call link in the Offers page or Information page. The profile information that the anonymous visitor enters creates a prospect record that is associated with the responses.

Email Contact

When a contact clicks an embedded link in an email, your Web Marketing home page appears and the Contact Id is set in an anonymous session. At this point, the email contact is not logged in. The contact must be a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the contact to be a registered contact. The email contact can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the Web Marketing home page, the contact can log in. After logging in, the email contact becomes a logged-in contact.

If an email contact clicks the My Accounts link during an anonymous session, then the User Login (user registration) view appears, requiring the anonymous visitor to log in before continuing.

Email Prospect

When a prospect clicks an embedded link in an email, your Web Marketing home page appears, and the Prospect Id is set in an anonymous session. At this point, the email prospect is not logged in. The prospect must become a registered contact and must log in to access profile information in the My Accounts link or to perform any other tasks that require the prospect to be a registered contact. The email prospect can generate responses by clicking a Recommended Product link, downloading literature, or requesting product information or a telephone call.

In the Web Marketing home page, the email prospect must register as a new contact before the prospect can log in. In the User Login applet, the email prospect can enter a user ID and password or click the New User link to register as a new contact and obtain a user ID and password.

In the User Login view, the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing. When registration is complete, the prospect is converted to a new logged-in

contact. However, the original email prospect's responses are not associated with the new contact record. After logging in, the email prospect becomes a logged-in contact.

Note: If an email prospect clicks the My Accounts link during an anonymous session, then the User Login (user registration) view appears, requiring the anonymous visitor to log in or to register as a new user before continuing.

Logged-In Contact

This contact has access to the My Account link and can perform all other tasks that a registered contact is eligible to perform. The logged-in contact can generate responses by clicking a Recommended Product link, downloading literature, or by requesting product information or a telephone call. These responses are associated with the contact record in the database.

Requirements for Installing Siebel Web Marketing

Before you install and use Web Marketing, you must install the following:

- **Siebel Enterprise Server components.** To deploy information on the Web and customer applications, you must install the Siebel Application Interface, Siebel Gateway, and Siebel Server. For more information about installing components, see the Siebel Installation Guide for the operating system you are using.
- **Siebel Application.** To perform administrative tasks such as server administration, creating Web offers, and managing marketing activities, you must install an employee application such as Siebel eSales and add the Siebel Web Marketing license key. For more information about installing an employee application, review the appropriate administration guide, for example, Siebel eSales Administration Guide.

Note: Siebel Web Marketing is an add-on module to Siebel Marketing. For more information about installing Siebel Marketing, see Siebel Marketing Installation and Administration Guide.

Control of User Access to the Web Marketing Web Site

To control user access in your Siebel Web Marketing Web site, the following options are available:

- Using external authentication using LDAP (Lightweight Directory Access Protocol)
  LDAP is an Internet protocol that email programs use to look up contact information from a server.
- Creating database users for LDAP to use in database access
- Defining visibility for views and products
- Assigning a proxy employee
- Creating users through registration or user administration
- Associating users with accounts
- Allowing various levels of access such as Anonymous, Implicit login, and Explicit login

- Customizing access to home and login pages
  For more information about the New User link, see *Web Marketing Offers Page*.
- Using Web Single Sign-on (SSO) functionality
- Allowing another application to log in
- Adding fields to registration forms

Default Responsibilities and Users for Web Marketing

Responsibilities control which views the users can display. The views to which a user has access determines the links and page tabs that the user gets. For example, if a user has a responsibility that does not permit access to the Credit Cards view, then no Credit Cards link appears in the My Settings view. If no views within a business object are visible, then the page tab that maps to that business object is not displayed.

The responsibilities predefined for Siebel Web Marketing include:

- **Web Anonymous User.** Grants view visibility to anonymous users such as anonymous visitors, email prospects, and email contacts. For more information about these user types, see *Web Marketing and Web Site Visitors*. This responsibility allows the user to access views that do not have the Requires_Explicit_Login flags set to TRUE in Siebel Tools. For more information, see Using Siebel Tools.
- **Web Registered User.** The end user of the application in a business-to-consumer model such as a logged-in contact. For more information about these user types, see *Web Marketing and Web Site Visitors*. This user has registered and is recognized by the application either through his login, or because the user enters the site by clicking an embedded link in an email offer.
- **Web Corporate User.** The end user of the application in a business-to-business model. A Web corporate user is associated with an account and must be authorized by the Web Delegated Customer Administrator to access the site. An administrator can add new Web corporate users.

Assigning Default Campaigns and Default Offers

Assigning a default campaign and a default offer is part of the Web Marketing setup process. An offer associated with the default campaign can be designated as the default offer. The default campaign and default offer determine which offers are presented to the customer during that customer's Web Marketing session. These offers appear in addition to any targeted offers such as an embedded link in an email offer.

To assign a default campaign and a default offer, perform the following procedure.

To assign a default campaign and a default offer

1. Navigate to Administration - Application, then the System Preferences view.
2. To assign a default campaign, enter a campaign code in the Default Campaign Source Code field.

   CAUTION: The default campaign must be a campaign, not a campaign plan. If you associate the default campaign with the campaign plan, then the response records from your campaign are not associated correctly.

3. To assign a default offer, in the Default Offer Code field, enter a valid *treatment* code.

The treatment code specified must be for a treatment that is associated with an offer which is, in turn, associated with the default campaign specified in Step 2.

For more information about default offers and default campaigns, review the Featured Offers topic in *Web Marketing Offers Page*.

Use of Siebel Personalization with Web Marketing

Siebel Personalization delivers personalized content and offers to a customer profile, needs, interests, and history. Personalized content includes greeting users by name, presenting them with content targeted to their needs and interests, and showing them recommended products and offers based on their needs and history.

Using Siebel Personalization, you can define rules to show and hide content dynamically during a visitor's experience with Siebel Web Marketing. Personalization deployment rules can depend on data such as user's profile information, date ranges, company information, products and services that visitor has already purchased or reviewed, and specific session information.

The home page in Siebel Web Marketing includes the salutation applet in the upper corner. It typically includes a personal greeting, but it can be configured to deliver targeted content such as product promotions, announcements, birthday greetings, and offer updates. The home page also contains a list of recommended products and featured offers, both of which can be personalized based on user-specific information. Conditional expressions can be used to hide applets under certain conditions.

You manage personalization in the Personalization Administration screen in your application. For more information about administering personalization, see Siebel Personalization Administration Guide.

Customization of the Web Marketing User Interface

The product provides a set of Web templates and cascading style sheets (CSS) to create the look and feel of an application. Customers can create their own look and feel by modifying corporate logos, colors, and fonts in the style sheets and Web templates. When you modify these elements, make sure you save a backup copy in case you want to restore the original files.

Note: These elements are not automatically upgraded during the upgrade process.

The Siebel Web architecture uses the Siebel Application Interface to dynamically generate HTML pages from the configuration information in the Siebel runtime repository.

Web Templates

A Web template defines the layout and formatting elements of the user interface (UI), such as views, applets, and controls. These UI elements are associated with the templates by using Siebel Tools. The associated information is stored in the Siebel runtime repository. For example, you might have a View object with three applets. You associate a View Template with the view, and map each applet to a placeholder in that template. The advantage of this approach is that the UI objects in the repository are not hard-coded in individual templates. As a result, a number of View objects can share the same template if they share the same layout. The same process and design applies to applet objects.

The three primary templates types are Container, View and Applet. The final HTML pages created by the Siebel Application Interface places the applet in the view and the view in the container. Siebel Business Applications provide numerous applet and view templates with the product. They can be viewed and edited in Web Tools. For more information about the physical user interface layer, see Configuring Siebel Business Applications.

To change the look and feel of your Web site, the following modifications are available:

- Adding or removing applets
- Changing colors
- Changing controls
- Making fields in a form appear
- Modifying behavior caused by clicking a button
- Modifying views and applets
- Modifying Web Templates

For more information about customizing the user interface, see Configuring Siebel Business Applications.

Web Marketing Without Frames

Customer and partner applications use HTML frames for compatibility when running in browser-based applications. HTML frames creates portions of the browser window that can scroll independently of the rest of the window. For example, you can place the navigation elements in one frame and content in another frame. You can scroll the content while the navigation elements remain in a fixed location.

Customer and partner applications can be implemented without using frames. Before choosing this method, consider the following limitation. In an unframed application, all UI elements exist in the same window. Therefore, the contents list might scroll off the page you scroll down. For example, if you scroll down to review content, then the navigation elements might not be visible.

Full-Text Search

Siebel Search for Customers is a subset of the Siebel Search product. Use it to scan database tables and documents for pertinent information. Siebel Search is included with every license of an Oracle Siebel application. For more information about Siebel Search and Siebel Search for Customers, see *Siebel Search Administration Guide* .

Response Management

Use Siebel Web Marketing to capture a series of responses during a customer interaction. The following information lists the responses captured.

Response	Description
Clicked on Product URL	Captured when the recipient clicks the embedded link for the product in an email or Web offer.

Response	Description
Clicked on Web Offer	Captured when the recipient clicks the embedded link for a Web offer in an email offer.
Clicked on Web Survey	Captured when the recipient clicks the embedded link for the Web survey in an email or Web offer.
Completed Web Survey	Captured when the recipient submits his survey responses, after clicking the embedded link in an email. To view the response, navigate to the Responses screen.
Downloaded Info/File	Captured when the recipient clicks the embedded link for the document that is downloaded in a Web offer.
Requested call back	Captured when the recipient submits a request after clicking the embedded link in an email or Web offer.
Requested more info	Captured when the recipient submits a request after clicking the embedded link in an email or Web offer.
Requested Unsubscribe	Captured when the recipient submits a subscription preference updates after clicking the embedded link in the email offer. In addition to the response, the contact profile is updated.
Submitted Source Code	Captured when a contact or prospect enters a source code and offer code in the Do you have Another Offer form in the Offers page.

Additional responses and events can be captured through configuration. For more information, see the event tracking topics in *Using Siebel Tools* .

Siebel Web Marketing Web Site

The Siebel Web Marketing Web site displays the Offers page, the Information page, and its related views. Using the navigation bar, you can manage your personal profile by changing preferences in the My Settings view.

Web visitors access the My Settings view by clicking the My Account link in the navigation bar of any Web Marketing page. The following information lists the links in the My Settings view that users and visitors can use to manage their personal profiles.

Link	Description
Address Book	A list of available addresses for the visitor. Visitors can add, delete, and modify their address, and the update their information in the Siebel database.
Credit Cards	A list of available credit cards for the visitor. This view is not required if you do not implement the Siebel eSales module or if you do not want to use credit card management.
Subscription Preferences	A series of channel-specific and general communication preferences for each visitor. This view could be modified through Siebel Tools to include additional subscription preferences, for example by product or area of interest. These preferences could then be used to drive marketing activities for that

Link	Description
	visitor. This view appears when a visitor clicks on the Request Unsubscribe embedded URL in an email and a response is created when the visitor clicks Submit. The individual's preferences are also updated in the Siebel database.
User Profile	A series of user profile fields, which the visitor can modify. This view can be extended to display additional profile information.

Note: Auction Privilege, Lister Payment, Notification Preferences, and Shipping Terms, are not used at this time.

Web Marketing Offers Page

The default home page for Web Marketing is the Offers page. The center applet of this view contains the specific Web offer intended for each Web site visitor. The Offers page provides links to other views, including additional offers, product information, Web surveys, and account and contact profile information.

The Offers page has several configurable applets, which this topic describes.

Salutation

The salutation text that appears depends on the personalization rules that are applied for the visitor who accesses the page. After logging in, registered email recipients or Web users get a greeting customized with their names. An anonymous Web visitor's greeting says "Welcome!" You can change the salutation greeting text in the Personalization Administration views.

Note: When Web Marketing is deployed as part of the eCustomer application (a bundle of eSales, Self Service and Web Marketing), the visitor can display the Offers page (Web Marketing home page) and the eCustomer home page. Because the eCustomer home page has a salutation greeting, the salutation greeting is suppressed in the Offers page (Web Marketing home page).

New User Link

You can set up the New User link that appears in the User Login applet so a Web site visitor can create a user ID and password for limited access to your Web Marketing Web site. When a visitor clicks New User on the Web Marketing home page, the registration views appears. The process is managed by a workflow business process that you can modify. For more information, see Siebel Business Process Framework: Task UI Guide and Siebel Business Process Framework: Workflow Guide.

Note: If a prospect registers, then the prospect is converted to a contact. After becoming a contact, responses captured for the prospect are not associated with the new contact record. For more information, see Siebel Security Guide.

Web Offer

The center applet of the Offers page displays Web offer details. The applet contains the contents of the Web offer presented to the visitor. The Offer that appears is determined in the following ways:

- The offer details are based on the Web-offer link that the visitor selects in an email.
- The offer details are based on how Siebel Personalization sorts the offers in the Featured Offers applet. Details for the best offer in the Featured Offers applet appear in the center applet.

Note: If no featured offers exist, then the Featured Offers area displays nothing.

Recommended Products

This applet contains a list of recommended products, customized for each visitor based on that visitor's Web profile attributes. This list can be modified using the Personalization Administration views. Unidentified visitors get a default listing.

Featured Offers

This applet displays every Web offer for which the contact or prospect is eligible. When a visitor logs onto a Web site and clicks the Send Product Information or Request Call Back link, the response is captured for the default campaign and offer.

Web-offer types have the following characteristics:

- **Web offers associated with the default campaign.** When you specify a default campaign, the offers associated with that campaign appear in the Featured Offers list. The default campaign does not have to be loaded with campaign contacts and prospects. However, the campaign and associated Web offers must have active dates, and the Inbound Active flag must be checked.
- **Web offers associated with other active campaigns.** These have been loaded with contacts and prospects. The offers must have active dates and the Inbound Active flag must be checked. Only those contacts and prospects targeted get these Web offers in the Featured Offers applet.

For more information about setting the default campaign or default offer, see *Assigning Default Campaigns and Default Offers*.

Information Page

This applet contains hyperlinks to the following applets in the Information page:

- Downloads
- Send Product Information
- Request a Call

For more information about these applets, see *Web Marketing Information Page*.

Web Marketing Product Detail View

When a visitor responds to an offer (email or Web) by clicking an embedded product URL, a page with product details appears for that offer. This view displays details and incentive pricing for the selected offer. The price list associated with the offer determines the price shown in this view. The person who created the offer is responsible for associating the products and the correct price list with the offer. This combination determines the products that can be embedded

in the offers and the price that appears. For more information about price list administration, see *Siebel Pricing Administration Guide* .

Additionally, this view contains the Related Items applet, showing products that might be of interest to the Web visitor. Items in the Related Items list are based on previous purchases or literature requests.

In addition to viewing details, the Web visitor using Siebel eCustomer can purchase the product from this view by clicking Add Item. After adding the product, the selected item appears in the Last Item Added applet.

> **Note:** Checkout functionality exists only if the customer has purchased Siebel eCustomer. If you are not using eCustomer, then the Add Item button is unavailable.

Web Marketing Web Survey View

When the Web site visitor clicks an embedded URL for a Web survey in an email or Web offer, a survey wizard appears that navigates the visitor through a series of questions about the product. Survey results can be stored and then analyzed and used for future marketing activities. For information on Web surveys, see *About Web Surveys and Landing Sites*.

About Adding Unstructured Content

Oracle's Siebel Web Marketing has the ability to display general external and unstructured content in the Web Marketing site using the Microsite Management module. For more information, see *Siebel Applications Administration Guide* .

Web Marketing Information Page

Web site visitors can use the Information page to download product information and request more information. The visitor can reach this page clicking the Information page tab. The Information page contains the following applets:

- **Downloads.** Clicking a hyperlink opens the literature using the default viewer for that type of literature. The visitor can sort this list or search for any specific literature item by name, description, type, or date.
- **Request More Information.** Used by visitors to request product information (Send Product Information) and request a telephone call (Request a Call) using response forms.

Web Marketing Send Product Information View

The Send Product Information view displays a form that Web site visitors can complete to request that product information be sent to them. This view can be accessed from the Offers and Information pages or as an embedded URL link in an email offer or a Web offer.

The Available Products area lists products for which more information is available. Whether or not information is available for a product is determined by the catalog visibility. For more information, see Siebel Product Administration Guide.

When the Send Product Information or Request Call Back views are accessed using an offer's embedded URL, the list of products is restricted to the products associated with the offer. The visitor can browse the list, selecting products of interest, and then move the items to the Selected Products list by clicking Add.

A visitor can request information about the one or more items in the Selected Products list by selecting the check boxes. To clear an item from the list, choose a Selected Product item, and then click Remove. After the Web site visitor chooses the products for which he or she wants more information, the visitor clicks Continue to move to the delivery form. In the delivery form, the Web site visitor can choose direct mail, email, fax, or phone as the delivery method, and then fill in the necessary information for the delivery method. When the visitor clicks Submit, the Confirmation view appears listing the products for which the visitor requested information and the delivery information. This information is stored as a response of the type Requested More Info.

Web Marketing Request a Call View

The Web site visitor can use the Request a Call view to request a callback about one or more products. This view can be accessed from the Offers or Information pages or as an embedded URL in an email offer or a Web offer. When accessed from an email or Web offer, the products available are limited to those products associated with the offer. When accessed from the Offers or Information pages, the products are limited by Catalog visibility.

Requests for a telephone call are initiated in the same way as requests for product information, using Available and Selected product lists. After the visitor chooses the products that he or she wants to discuss in a callback, the visitor clicks Continue to move to the Request Call form. There the visitor provides a phone number, the time of day to call, and adds comments. When the visitor clicks Submit, a Confirmation appears containing a list of products for which the visitor requested a callback and a list of call preferences. This information is stored as a response of the type Requested Call Back.

About Web Surveys and Landing Sites

A landing site is a type of Web treatment. It is a specialized Web site where visitors are directed when they click an embedded link in an email or click a banner advertisement or pay-per-click ad. The page is usually focused on a particular product or service with the aim of getting the visitor to buy a product or perform an action that will ultimately lead to a sale.

The landing site module has the following components:

- **Questions Library.** The library contains a set of questions, question formats, and possible answers that can be reused in surveys.
- **Surveys.** These are groups of questions and answers with mappings to a specific set of fields in the Siebel application.
- **Landing Sites.** They include a landing page, a survey, and a confirmation page. You can publish the landing site outside the firewall or within the DMZ.
- **Responses.** These are customer or prospect responses to landing page hits and survey responses. Survey questions can include standard questions from a library as well as dynamic questions created for a specific campaign.

Landing sites can be deployed in any of the following forms:

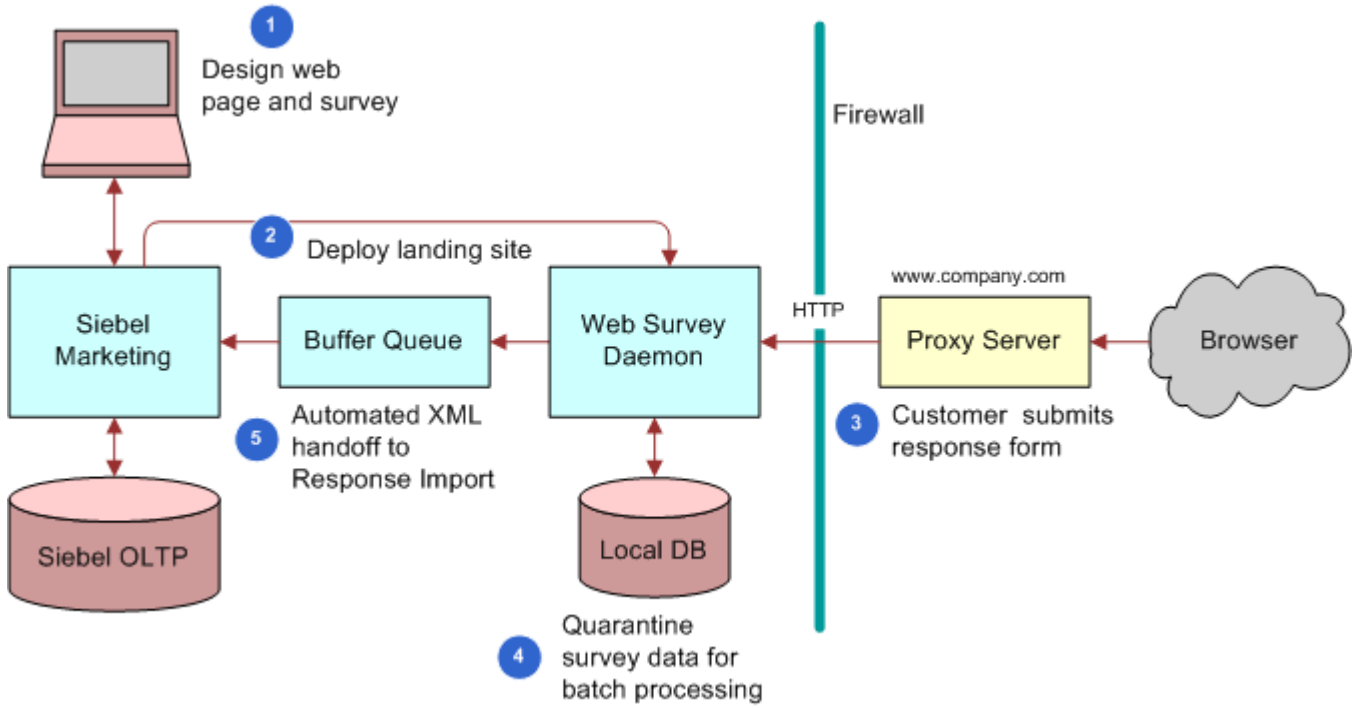
- Landing Page with content and no form. Includes an HTML header, footer, and banner (all sections are optional).
- Landing Page with Data Entry form on first page. Includes a header, footer, banner content, and a central HTML body with a survey form for data entry.

- Landing Page with one page form on the next page.
- Landing Page and a link to a multi-page survey.
- Multi-Page survey with no separate landing page. The first page of the survey is the landing page.

Each of the these types can have a separate confirmation page.

The Web survey deployment process contains the following steps, which are illustrated in the following figure:

1. The Web page and survey are designed.
2. The Web page and survey are deployed to the Web Survey Daemon.
3. The customer submits the response form.
4. The WSD quarantines the survey data for batch processing.
5. The WSD hands off the XML response to the Response Import workflow.



Landing Site Deployment Methods

Surveys can be deployed for end users in the following mechanisms:

- **Email Clickthrough to Survey.** The marketer embeds the survey URL as a trackable URL in the email content. When sending the email, the clickthrough URL to the survey is appended with basic information that identifies the customer. When the end user receives the email and clicks the survey URL, the survey landing page or first page of the survey is displayed. The survey page will parse the URL to log which customer has started taking the survey.
- **Web Ad.** Clicking the Web banner ad prompts the user for an action. The clickthrough URL links to the survey URL. The Web Survey Daemon (WSD) can parse the HTTP string to store any embedded information for the survey, such as source IP address and Web treatment ID (of the banner ad).
- **Keyword Search.** End users can search for keywords on a major search engine. The search results show links to Web sites, including links to landing pages that corporations have created to direct traffic to their site. When the end user clicks the landing site link, the users are navigated to the landing site. The survey application can

parse the HTTP string to store any embedded information for the survey, such as source IP address and Web treatment ID (of the search ad).

- **Authenticated Visitor on corporate Page.** In this case, the logged in user's user ID is passed to the landing site as a parameter.

About the Web Survey Daemon

The Web Survey Daemon (WSD) resides in the DMZ and supports Web landing sites and surveys without the need for SmartScript. For information on how to install and configure the WSD, see *Siebel Marketing Installation and Administration Guide* .

Using the Task UI Application to Create or Update a Landing Site

Siebel Marketing includes the Create/Update Landing Site task to streamline the process of creating or updating landing sites and surveys. For information on using the Task UI application, see Siebel Fundamentals. For details on customizing, activating, and assigning access privileges for tasks, see Siebel Business Process Framework: Task UI Guide.

The following example lists the steps that an end user performs to use the Create/Update Landing Site task.

To create or update a landing site

1. Navigate to the Landing Sites screen.
2. Click the Task button.
3. In the Task UI pane, click Create/Update Landing Site.
4. Choose to create a new site or edit an existing one.
5. In the Site Details screen, review and adjust any necessary fields for landing site and deployment information.

   The following table describes some of the fields.

Field	Comment
Treatment Code/Site Code	Unique alphanumeric code to represent the treatment.
Site Status	Options include: o In Draft. In this state, the URLs for the landing site are not accessible by customers outside the firewall. In Draft is the initial state of the object. o Active. Once the landing site is deployed, the status of the landing site automatically becomes Active. Once a landing site is active, the survey included in the landing site is automatically locked. The locked survey can be unlocked by the survey creator or owner and modified. A deployed site must be removed, and then redeployed to reflect the survey changes. o Inactive. When the Undeploy button is clicked, the status of the landing site moves to Inactive. You can manually change the status of the landing site to Inactive. o Archived/ Completed. A terminal state for the object. There are no Deploy or Undeploy buttons available.

Field	Comment
Start Date	Date when the landing site starts appearing outside the firewall. Automatically populated with the system date when the Deploy button is clicked.
End Date	The date when the landing site stops being accessible from the Internet. The status of the landing site might be active, but the end date determines when the landing site stops being available. You can update this date even after the landing site is active.
Allow users to resume surveys	If checked, allows users to partially enter surveys and return later to the site to complete the survey (answers are remembered).

6. In the Edit Side Panels screen, associate any Left Panel (first panel) and Right Panel (second panel) HTML content. HTML content is reusable and can be created and edited by navigating to the Landing Sites screen, then the HTML Content view.
7. In the Edit Landing page screen, select an HTML document to display at the center of the page. Edit the content in the HTML as necessary. If Start Survey On Landing Page is checked, then the survey is started in the landing page after the landing page content is rendered. Otherwise, the first page of the survey starts after the landing page. If not checked, then you can embed a link, image, or tag to start the survey.
8. In the Select Survey screen, if you want your landing site to contain a survey, then select a survey from the list of values and complete the fields. Otherwise, click Next.
9. In the Survey Questions screen, you can add or modify reusable survey questions. The Preview button displays the survey page for the landing site.
10. In the Edit Confirmation Page, you can select an HTML document as a template for confirmation page content.
11. In the Preview and Deploy screen, you can review the details of the site you have created so far and specify its associated URLs. The Preview button displays the landing site as it will appear to users. The Activate button deploys the site to the runtime environment, changes its status to Active, sets the system date to the start date of the landing site, and makes the landing page available to users outside the firewall. The Refresh button removes and then redeploys the latest definition of the site.

Customizing a Landing Site

The following tags are available for customizing the .css file for a landing site:

- surMainTable
- surName
- surSection
- surSectionLine
- surSectionIntro
- surQuestionText
- surQuestionInstructions
- surAnswerText
- surTableHead

- radioAltColor
- formBigSubmit

The width of the survey table cell is dependent upon content being present in the sidebars (on either side of the page). If there is no content in either sidebar, then the cell is 100% of the width of the table. If there is content in one sidebar, then the survey table cell is 80% of the table width. If both sidebars have content, then the survey table cell is 60% of the table width.

CAUTION: Template HTML and Web survey HTML are interrelated. If a table, row, or cell starts in a template, then it must end in that template, or else the subsequent HTML will render within that table, row, or cell. HTML code that is copied from another Web page and pasted into a survey page does not display as intended.

Note: You can edit the text that appears next to the Submit button by changing it in the Messages_en.properties file, located in the *Catalina_Home* `\webapps\websurveys\config` directory. This file is language-specific, and changes for other languages must be made in their respective properties files. Because these strings are cached in memory, you must restart the server for the changes to take effect.

Extending Survey Field Mapping

The Map to Columns pick list in the Survey Questions view designates the business component fields that a survey answer will populate. You can extend the number of columns available in this list of values with the following procedures.

These are the high-level steps for extending survey field mapping:

1. Extend the list of values to add more values.
2. Create an .xsd file with new columns.
3. Generate XML beans for the .xsd.
4. Create a new mapping using XML that has these new columns.
5. Specify the Mapping ID in the websurvey.properties file.

Extending Survey Field Mapping

The following procedure shows how to extend survey field mapping.

To extend survey field mapping

1. Navigate to Administration-Data screen, then the List of Values view, and add a new column of type MKTG_MAP_TO_COL (for example, Income).
2. Create an .xml file that contains the newly added LOV.
3. Create a new import with Source Type as XML File and the File Name as the newly created .xml file (for example, resp3.xml). Navigate to the Administration - Marketing screen, then the Import view. Choose the Main Object as type Response.
4. For the import job, go to Data Mapping and click Load Mapping to see all the fields from the .xml file that will be imported. For each column, map to the corresponding Input Field and Input Object from the Marketing server. (For example, for Income, the Input field is Income and the Input Object is Contact.)
5. Save, activate, and use the Import ID as the value of SIEBEL_MAPPINGID in the websurvey.properties file.

6. Restart the Web Survey Daemon.
7. Create a survey with a question mapped to the newly added column.
8. Create a landing site with the newly created survey and activate it.

Editing and Compiling the .xsd File

The following procedure shows how to edit and compile the .xsd file for extending survey field mapping.

To edit and compile the .xsd file

1. Add the new column value (for example, Income) to **`websurveys\WEB_INF\classes\ schemaorg_apache_xmlbeans \src\surveyResponse.xsd`** under surveyResponse. For example, add this entry for the new column value:

   ```
   <xsd:element name="Income" type="xsdLocal2:string30" minOccurs="0" />
   ```

2. Recompile the modified surveyResponse.xsd using the command:

   ```
   $XMLBEANS_HOME\bin\scomp -src src -d bin -out surveyResponse.jar -compiler
   C:\Sun\SDK\jdk\bin\javac surveyResponse.xsd
   ```

   > **Note:** The JDK directory must be included in the path.

   > **CAUTION:** To avoid runtime errors, use compatible versions of the JDK and XMLBeans.

3. Copy the newly created surveyResponse.jar file into the **`websurveys\WEB_INF\lib`** directory.
4. Take a survey from the newly created landing site and confirm that the responses are being imported to the Siebel Web server.