PeopleSoft®

# PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook

**June 2004**

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook
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## Open Source Disclosure

# Contents

# About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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**Note.** PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

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## PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

# Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

## Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

**Important!** Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

### See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

## Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

### Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

### Telephone

Contact MMA Partners at 877 588 2525.

### Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

### See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

## Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

| Typographical Convention or Visual Cue | Description |
|---|---|
| **Bold** | Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call. |
| *Italics* | Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.<br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key. |
| `Monospace font` | Indicates a PeopleCode program or other code example. |
| “ ” (quotation marks) | Indicate chapter titles in cross-references and words that are used differently from their intended meanings. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( \| ). |

| Typographical Convention or Visual Cue | Description |
|---|---|
| [ ] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br>Ampersands also precede all PeopleCode variables. |

# Visual Cues

PeopleBooks contain the following visual cues.

## Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

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**Note.** Example of a note.

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If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

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**Important!** Example of an important note.

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## Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

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***Warning!*** Example of a warning.

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## Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

# Country, Region, and Industry Identifiers

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

Example of a country-specific heading: "(FRA) Hiring an Employee"

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

## Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

See Appendix C, "ISO Country and Currency Codes," ISO Country Codes.

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

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

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

## Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix C, “ISO Country and Currency Codes,” ISO Currency Codes.

# Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

# Common Elements in These PeopleBooks

**As of Date** — The last date for which a report or process includes data.

**Business Unit** — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

**Description** — Enter up to 30 characters of text.

**Effective Date** — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

**Once, Always,** and **Don't Run** — Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

**Report Manager** — Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

**Process Monitor** — Click to access the Process List page, where you can view the status of submitted process requests.

**Run** — Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

**Request ID** — An ID that represents a set of selection criteria for a report or process.

**User ID** — An ID that represents the person who generates a transaction.

**SetID** — An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

**Short Description** — Enter up to 15 characters of text.

# PeopleSoft Marketing Applications Preface

This preface discusses:

- PeopleSoft CRM application fundamentals.
- PeopleSoft CRM automation and configuration tools.
- PeopleTools PeopleBooks.

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**Note.** This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

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## PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews.

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

### See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

# PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

There are four parts to the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*:

- Correspondence management.

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation tools.

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.

- Configuration tools.

  This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge management.

  This part discusses the setup of Natural Language Processing (NLP) and verity search.

### See Also

*PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*

# PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.45 PeopleBooks.

# CHAPTER 1

# Getting Started with PeopleSoft Marketing

This chapter provides an overview of PeopleSoft Marketing applications and discusses:

- PeopleSoft Marketing applications business processes.
- PeopleSoft Marketing applications implementation.

## PeopleSoft Marketing Overview

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

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

### See Also

*PeopleSoft Enterprise Online Marketing 8.9 PeopleBook*

## PeopleSoft Marketing Business Processes

PeopleSoft Marketing applications provide the following business processes:

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

We discuss these business processes in the business process chapters in this PeopleBook.

# PeopleSoft Marketing and Telemarketing Implementation

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

### Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook* and *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook* with information on where to find the most up-to-date version of each.

### See Also

*PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9 PeopleBook*

CHAPTER 2

# Navigating in PeopleSoft Marketing

This chapter discusses how to navigate in PeopleSoft Marketing.

## Navigating in PeopleSoft Marketing

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

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

#### See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

### Pages Used to Navigate in PeopleSoft Marketing

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

#### Marketing Center

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

| Page Name | Navigation | Usage |
|---|---|---|
| Marketing Center | Main Menu, Packaging, Marketing Center | Access primary Marketing Center menu options and activities. |
| Marketing Programs | Click Marketing Programs on the Marketing Center page. | Access Marketing Programs to create or edit marketing programs such as campaigns, dialogs or rollups. |
| Advisor Workbench | Click Advisor Workbench on the Marketing Center page. | Define advisor dialogs |
| Dialog Designer | Click Dialog Designer on the Marketing Center page. | Access the dialog designer to create or edit marketing dialogs. |
| Marketing Programs | Click Marketing Programs on the Marketing Center page. | View program summary information, and sort or filter by program attributes. |

| Page Name | Navigation | Usage |
|---|---|---|
| Outbound Calls | Click Outbound Calls on the Marketing Center page. | Conduct outbound campaigns, contact prospects, and record call outcomes. |
| Audiences | Click Audiences on the Marketing Center page. | Define and manage target audiences and segments. |
| Audience Lists | Click Audience Lists on the Marketing Center page. | Access the Audience Search page. |
| Audience Segments | Click Audience Segments on the Marketing Center page. | Access the Audience Search page. |
| Data Import | Click Data Import on the Marketing Center page. | Import data. |
| Data Import Global Settings | Click Data Import Global Settings on the Data Import page. | Specify data import global settings. |
| Data Import Templates | Click Data Import Templates on the Data Import page. | Access data import templates. |
| Run Data Import | Click Run Data Import on the Data Import page. | Run the data import. |
| View Import Status | Click View Import Status on the Data Import page. | View import status. |
| Profile Definitions | Click Profile Definitions on the Marketing Center page. | Manage marketing profile definitions. |
| Enterprise Content and Offers | Click Enterprise Content and Offers on the Marketing Center page. | Manage marketing collaterals and setup offers. |
| Manage Offers | Click Manage Offers on the Marketing Center page. | Create offers based on product, base price, and discount information. |
| Marketing Collaterals | Click Marketing Collaterals on the Marketing Center page. | Manage marketing content for targeted audiences. |
| Online Documents | Click Online Documents on the Marketing Center page. | Search online documents. |
| Analysis | Click Analysis on the Marketing Center page. | Discover and gain insights into customers. programs, and products. |
| Interactive Reports | Click Interactive Reports on the Analysis page. | Marketing Performance and Forecast Analysis |
| Campaign Performance Forecast | Click Campaign Performance Forecast on the Analysis page. | Campaign Performance/Forecast Analysis |
| Dialog Performance Forecast | Click Dialog Performance Forecast on the Analysis page. | Dialog Performance/Forecast Analysis |

| Page Name | Navigation | Usage |
|---|---|---|
| Operational Reports | Click Operational Reports on the Analysis page. | View quality reports. |
| Campaign Management | Click Campaign Management on the Operational Reports page. | Request a campaign management report. |
| Content Management | Click Content Management on the Operational Reports page. | Request a content management report. |
| Campaign-Content Management | Click Campaign-Content Management on the Operational Reports page. | Request a campaign-content management report. |
| Campaign Effectiveness | Click Campaign Effectiveness on the Operational Reports page. | Request an effectiveness report based on business unit, status, and date range. |
| Campaign Expense | Click Campaign Expense on the Operational Reports page. | Request a campaign expense report. |
| Activity Effectiveness | Click Activity Effectiveness on the Operational Reports page. | Request an activity effectiveness report based on business unit, status, and date. |
| Campaign Activity Effective | Click Campaign Activity Effective on the Operational Reports page. | Request a campaign and activity report based on business unit and date range. |
| Task Management | Click Task Management on the Operational Reports page. | Request a task management report. |
| Campaign ROI | Click Campaign ROI on the Operational Reports page. | Request a return-on-investment report. |
| Campaign Count by Score | Click Campaign Count by Score on the Operational Reports page. | Request a report of campaign counts by score. |

## Marketing Analysis Center

The Marketing Analysis Center custom navigation pages are geared to the person in your organization who is focused on performing marketing analysis tasks.

| Page Name | Navigation | Usage |
|---|---|---|
| Marketing Analysis Center | Main Menu, Packaging, Marketing Analysis Center | Access primary Marketing Analysis Center menu options and activities. |
| Marketing Programs | Click Marketing Programs on the Marketing Analysis Center page. | Manage marketing programs and activities. |
| Marketing Programs | Click Marketing Programs on the Marketing Programs page. | View program summary information, and sort or filter by program attributes. |
| Dialog Designer | Click Dialog Designer on the Marketing Programs page. | Access the dialog designer to create or edit marketing dialogs. |

| Page Name | Navigation | Usage |
|---|---|---|
| Advisor Workbench | Click Advisor Workbench on the Marketing Programs page. | Define advisor dialogs. |
| Outbound Calls | Click Outbound Calls on the Marketing Programs page. | Conduct outbound campaigns, contact prospects, and record call outcomes. |
| Audiences | Click Audiences on the Marketing Analysis Center page. | Define and manage target audiences and segments. |
| Audience Lists | Click Audience Lists on the Audiences page. | Access the Audience Search page. |
| Audience Segments | Click Audience Segments on the Audiences page. | Access the Audience Search page. |
| Data Import | Click Data Import on the Audiences page. | Import data. |
| Data Import Global Settings | Click Data Import Global Settings on the Data Import page. | Specify data import global settings. |
| Data Import Templates | Click Data Import Templates on the Data Import page. | Access data import templates. |
| Run Data Import | Click Run Data Import on the Data Import page. | Run the data import. |
| View Import Status | Click View Import Status on the Data Import page. | View import status. |
| Profile Definitions | Click Profile Definitions on the Marketing Center page. | Manage marketing profile definitions. |
| Customer Behavior Modeling | Click Customer Behavior Modeling on the Marketing Analysis Center page. | Consolidate customer data across the enterprise. Build and use predictive models and scores. |
| Marketing Analysis | Click Marketing Analysis on the Marketing Analysis Center page. | Discover and gain insights into customers, programs, and products. |
| Operation Reports | Click Operation Reports on the Marketing Analysis page. | View quality reports. |
| Campaign Management | Click Campaign Management on the Operation Reports page. | Request a campaign management report. |
| Content Management | Click Content Management on the Operation Reports page. | Request a content management report. |
| Campaign-Content Management | Click Campaign-Content Management on the Operation Reports page. | Request a campaign-content management report. |

| Page Name | Navigation | Usage |
|---|---|---|
| Campaign Effectiveness | Click Campaign Effectiveness on the Operation Reports page. | Request an effectiveness report based on business unit, status, and date range. |
| Campaign Expense | Click Campaign Expense on the Operation Reports page. | Request a campaign expense report. |
| Activity Effectiveness | Click Activity Effectiveness on the Operation Reports page. | Request an activity effectiveness report based on business unit, status, and date. |
| Campaign Activity Effective | Click Campaign Activity Effective on the Operation Reports page. | Request a campaign and activity report based on business unit and date range. |
| Task Management | Click Task Management on the Operation Reports page. | Request a task management report. |
| Campaign ROI | Click Campaign ROI on the Operation Reports page. | Request a return-on-investment report. |
| Campaign Count by Score | Click Campaign Count by Score on the Operation Reports page. | Request a report of campaign counts by score. |
| Interactive Reports | Click Interactive Reports on the Marketing Analysis page. | Marketing Performance and Forecast Analysis |
| Campaign Performance Forecast | Click Campaign Performance Forecast on the Analysis page. | Campaign Performance/Forecast Analysis |
| Dialog Performance Forecast | Click Dialog Performance Forecast on the Analysis page. | Dialog Performance/Forecast Analysis |
| My Portfolio | Click My Portfolio on the Marketing Analysis Center page. | Access the SmartViews |

CHAPTER 3

# Defining PeopleSoft Marketing Business Units

This chapter provides an overview of PeopleSoft Marketing business units and discusses how to define PeopleSoft Marketing business units.

## Understanding PeopleSoft Marketing Business Units

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

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

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

You also filter results in PeopleSoft Marketing by business unit.

## Defining PeopleSoft Marketing Business Units

This section discusses how to define PeopleSoft Marketing business units.

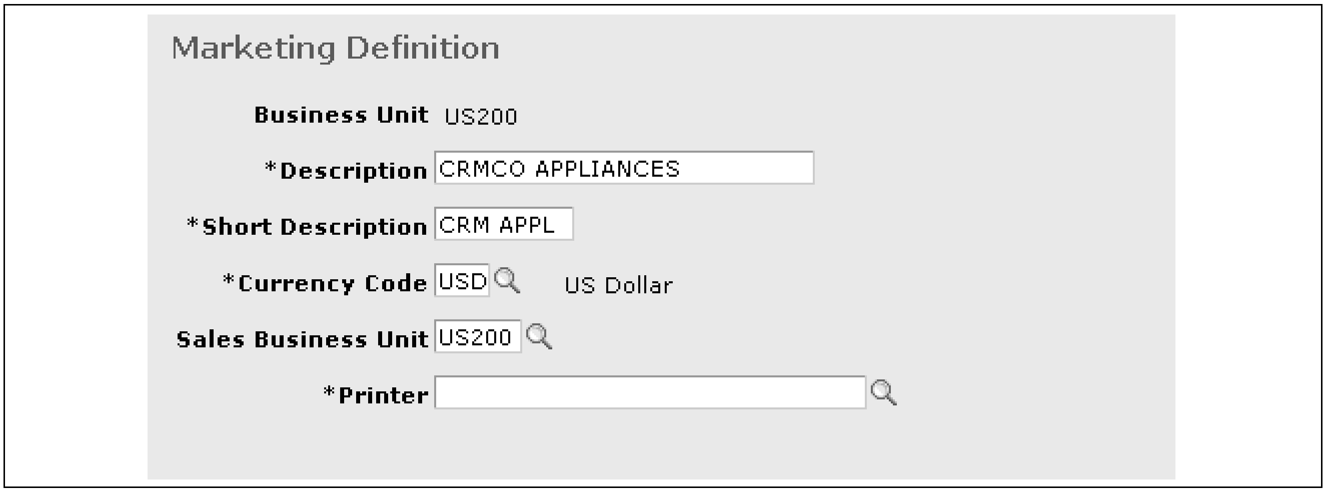
### Page Used to Define PeopleSoft Marketing Business Units

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Marketing Definition | RA_BUS_UNIT_TBL | Set Up CRM, Business Unit Related, Marketing Definition | Define PeopleSoft Marketing business units. |

### Defining PeopleSoft Marketing Business Units

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

Access the Marketing Definition page.




Marketing Definition page

**Default SetID**

Select the default setID to associate with the business unit.

**Note.** The system displays this field only when you define a new business unit that has not already been defined elsewhere within PeopleSoft Customer Relationship Management (PeopleSoft CRM).

**Currency Code**

Select the default monetary unit in which you conduct transactions in this business unit.

**Sales Business Unit**

Select the PeopleSoft Sales business unit that you want to associate with this marketing business unit.

**Printer**

Select a printer name for correspondence management.

**Create Business Unit**

Click to save and create the new business unit. This is the same as clicking the Save button.

**Note.** The system displays this button only when you define a new business unit that has not already been defined elsewhere within PeopleSoft CRM.

CHAPTER 4

# Setting Up PeopleSoft Marketing and Telemarketing

This chapter discusses how to:

- Set CRM application security for Marketing.
- Set dataset security.
- Set display templates for Marketing.
- Define campaign elements.
- Define channel elements.
- Define content elements.
- Define and create metrics.
- Define cost elements.
- Define audience maximum rows.
- Define task tools.
- Define telemarketing elements.

## Setting CRM Application Security for Marketing

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

### See Also

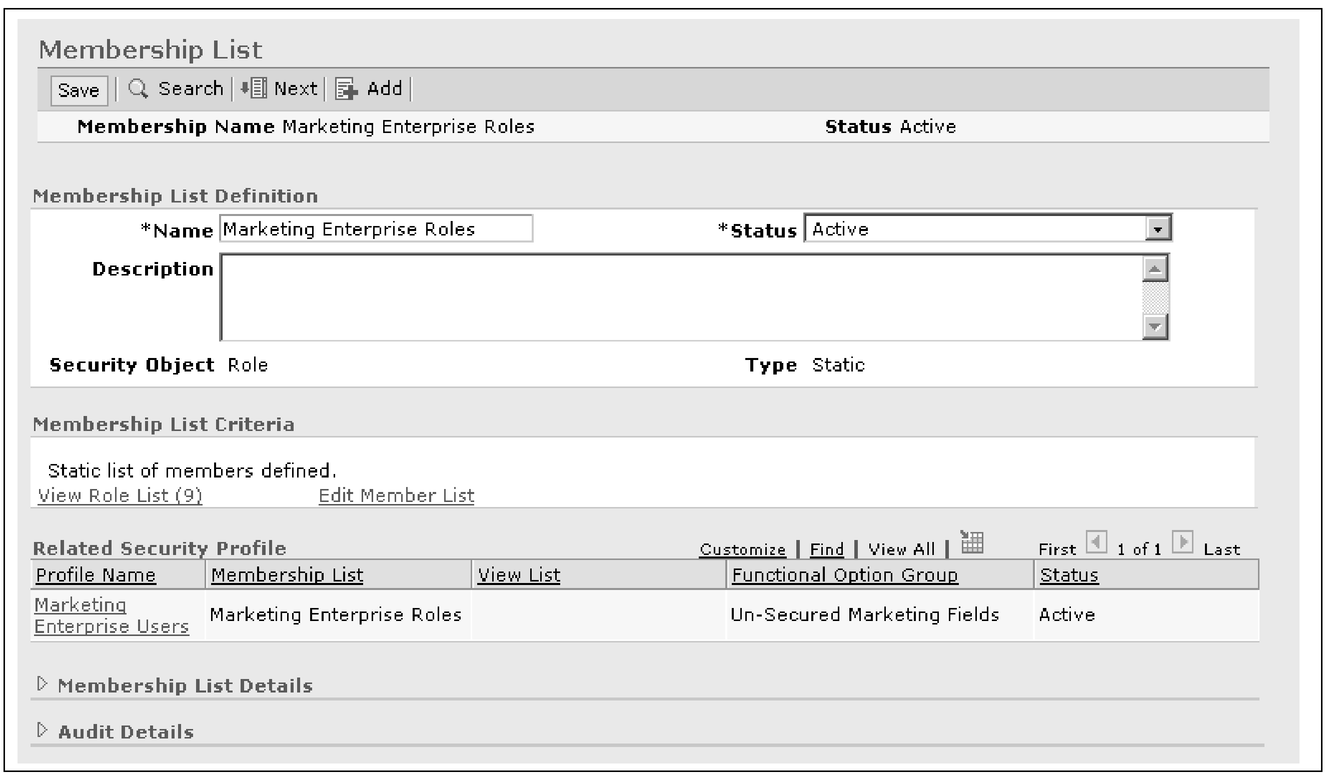
*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

## Pages Used to Set CRM Application Security for Marketing

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Membership List | RSEC_MEMBER_SMRY | Set Up CRM, Security, CRM Application Security, Search Membership List | Set up Enterprise Marketing roles as a membership list. |
| Add Membership List | RSEC_ML_ROLE | Click the Edit Member List link on the Membership List page. | Add a new membership list. |
| Functional Option | RSEC_FUNC_DEFN | Set Up CRM, Security, CRM Application Security, Functional Option | These items are delivered as system data and are used in display templates. |
| Functional Option Group | RSEC_FUNC_GROUP | Set Up CRM, Security, CRM Application Security, Functional Option Group | Set up a functional option group for Enterprise Marketingusers. |
| Security Profile | RSEC_PROFILE | Set Up CRM, Security, CRM Application Security, Search Security Profile | Create a new security profile to contain the membership list and functional option group. |

## Setting Up a Membership List

Access the Membership List page.



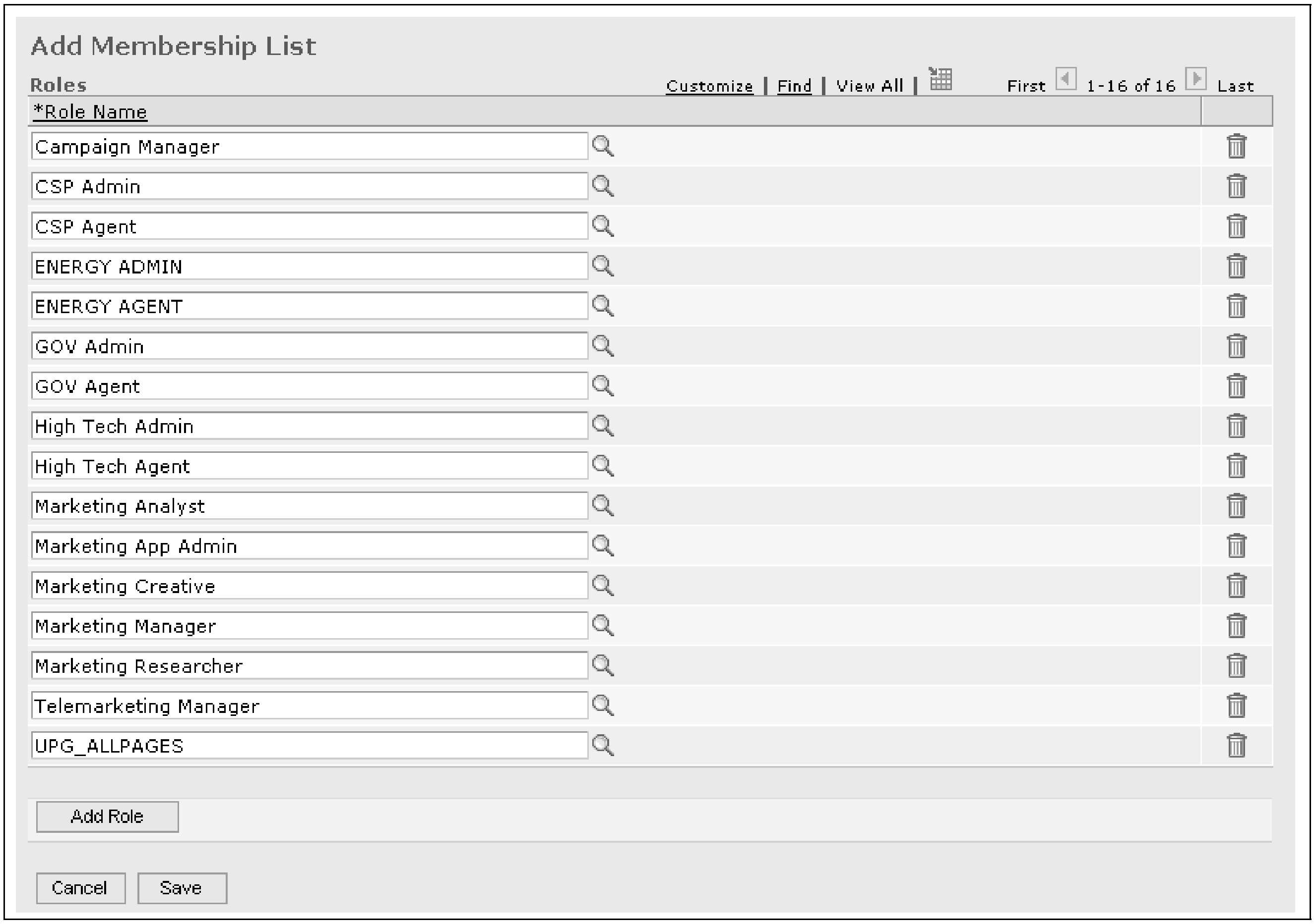

Membership List page

This includes all the roles enterprise marketing users will be assigned to. If needed multiple membership lists can be used.

### Adding a Member

The Add Membership List page displays the roles included in this membership list. You can edit the roles.

Access the Add Membership List page.

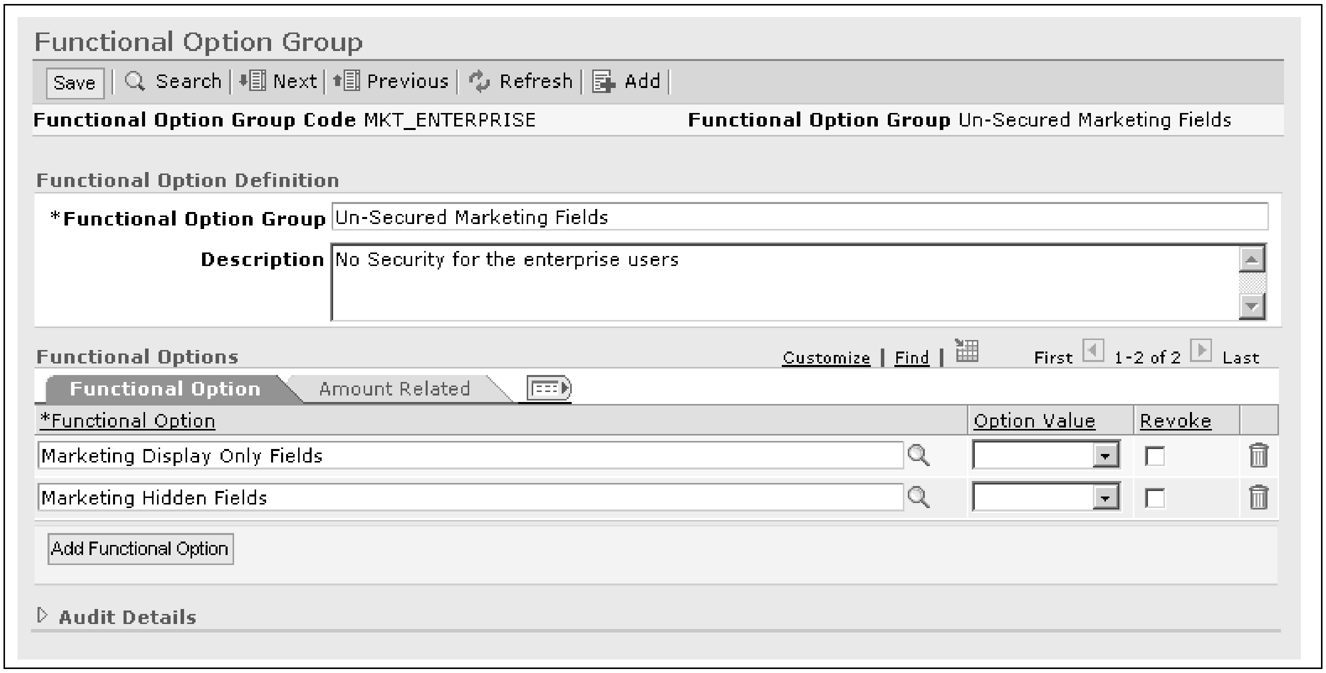


Add Membership List page

| | |
|---|---|
| **Role Name** | The name of the role. |
| **Add Role** | Click this button to add a new role to the list. |

## Setting Up a Functional Option Group

Access the Functional Option Group page.




Functional Option Group page

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

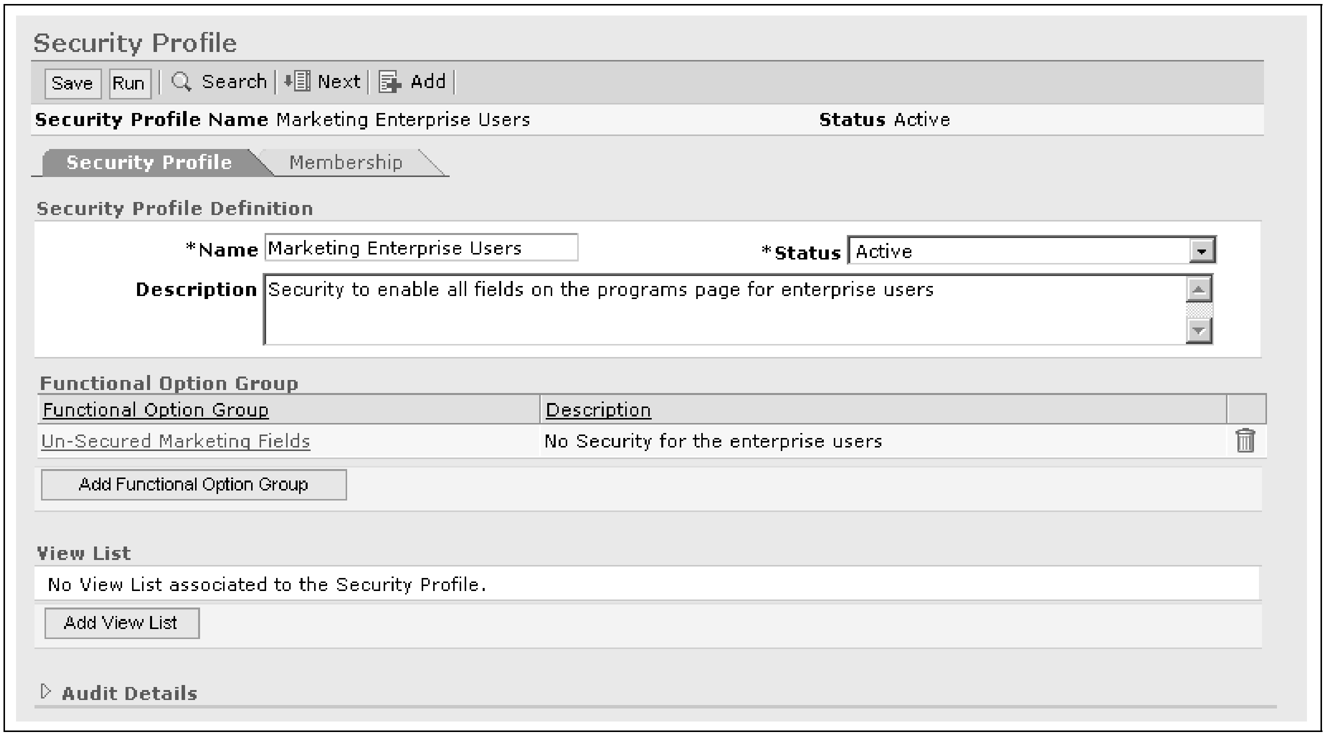
### See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

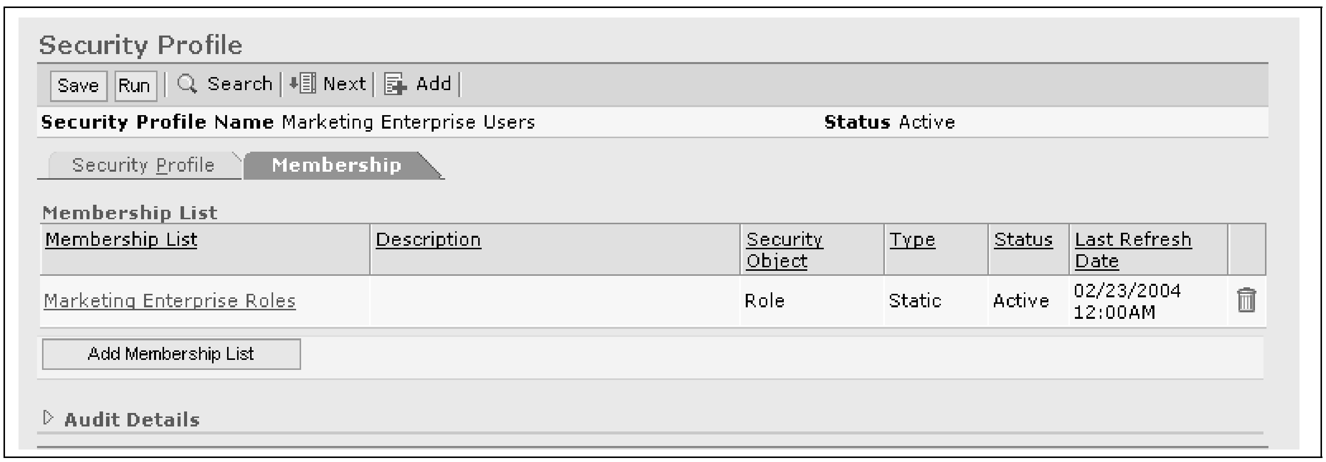
## Setting Up a Security Profile

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

Access the Security Profile page.




Security Profile page (1 of 2)




Security Profile page (2 of 2)

### See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

## Setting Dataset Security for Marketing

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

### See Also

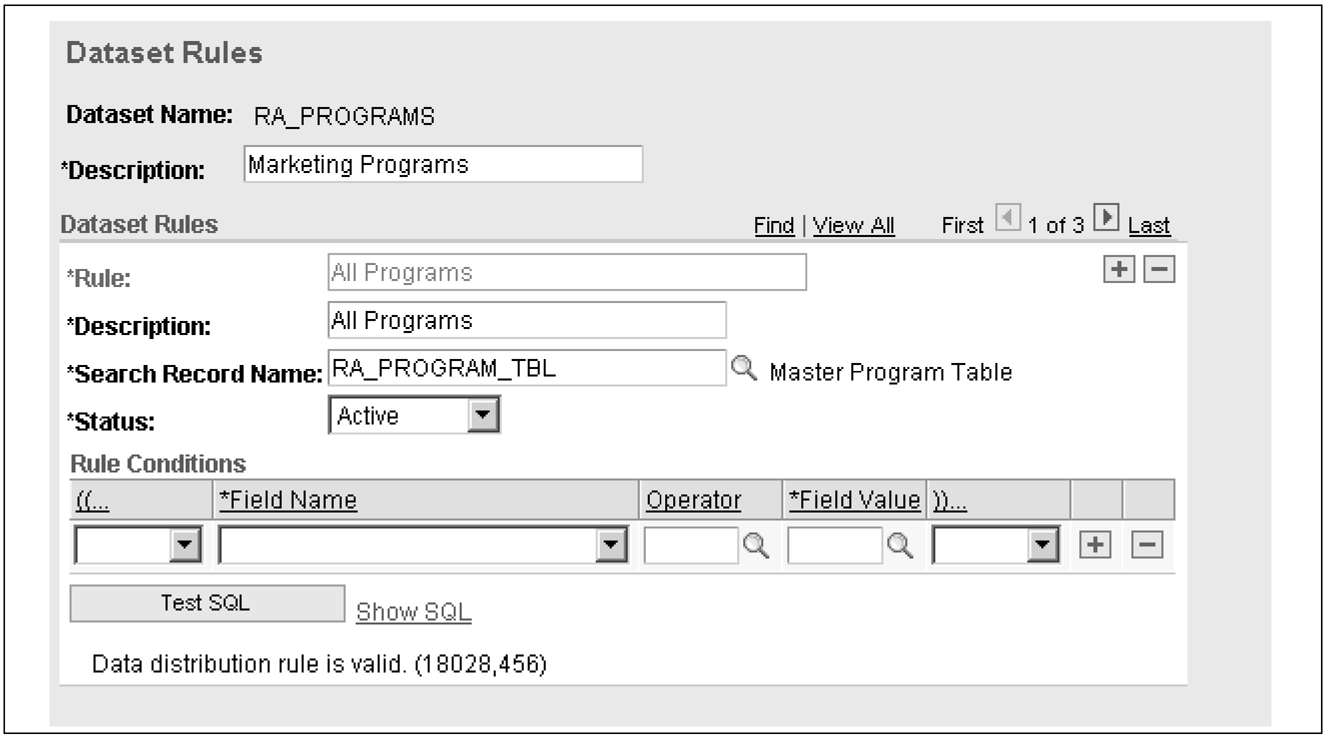
*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

## Pages Used to Set Dataset Security for Marketing

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Dataset Rules | EOEC_DATASET | Enterprise Components, Component Configurations, Datasets, Dataset Rules<br>Select the RA_PROGRAMS dataset. | Set dataset security for marketing programs. |

## Setting Dataset Rules

Access the Dataset Rules page.




Dataset Rules page

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

# Setting Display Templates for Marketing

This section describes how to set display templates for Marketing.

### See Also

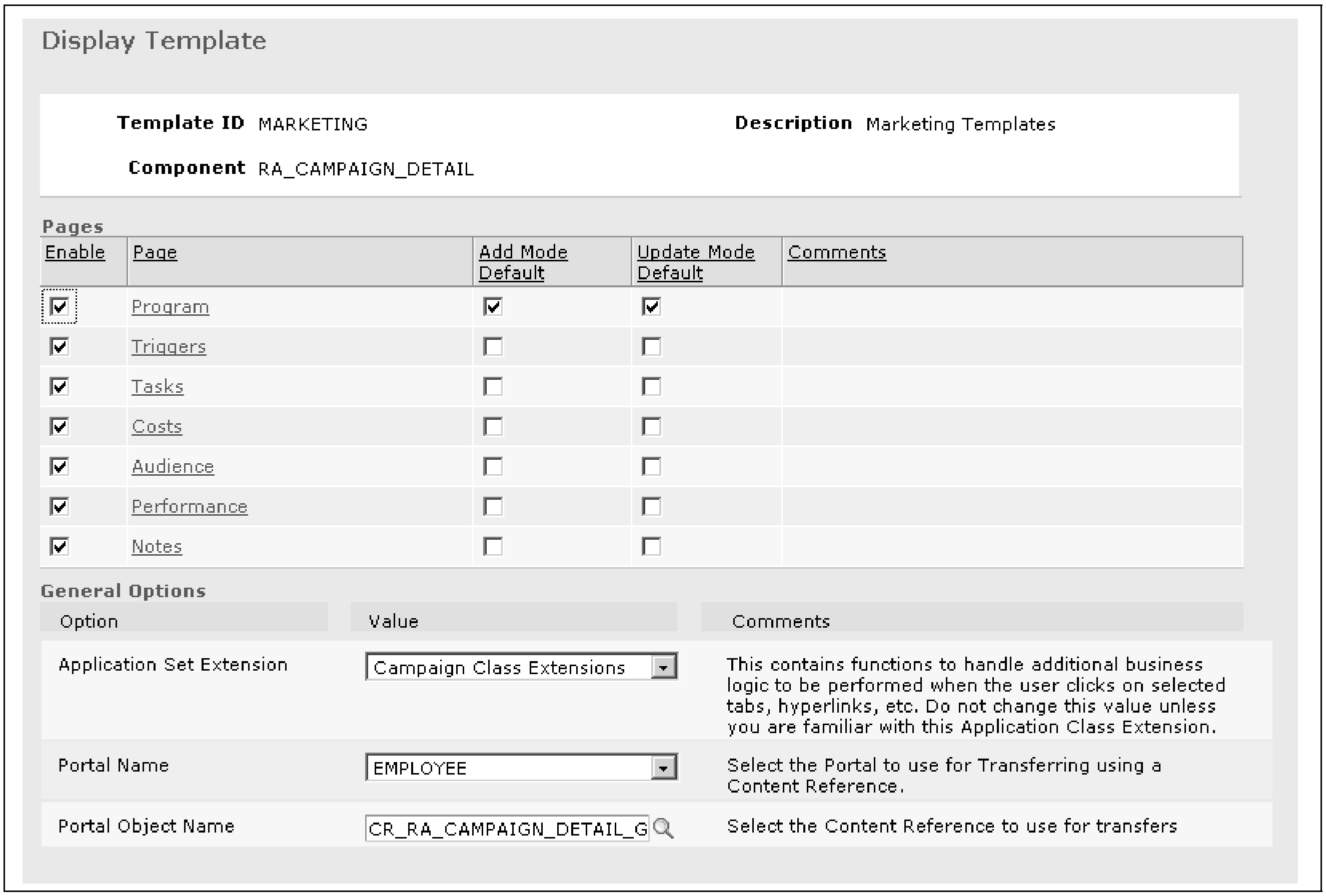
*PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*

## Pages Used to Set Display Templates for Marketing

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Display Template | RDT_TMPL_PAGE | Set Up CRM, Common Definitions, Component Configuration, Display Template Details<br>Select “Marketing” as the display template ID. | Set display template for marketing. |

## Setting Display Templates

Access the Display Template page.




Display Template page

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

# Defining Campaign Elements

This section provides an overview of campaign elements and discusses how to:

- Define campaign activity objectives.
- Define campaign and activity statuses.
- Define status rules.
- Define budget sources.
- Define trigger schedules.

## Understanding Campaign Elements

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

| Objective | Description |
|---|---|
| Acquisition | Acquire new customers. |
| Awareness | Increase awareness of your products or services among your target audience. |
| Cross Sell | Encourage members of your target audience to purchase products or services that complement those that they have already bought or intend to buy. |
| Events | Host an event, such as a meeting, party, seminar, or class. |
| Internal | Promote interest in your products or services among members of your own organization. |
| Loyalty | Encourage your target audience to make an emotional commitment to using your products or services. |
| Press and Analyst Relations | Communicate with journalists and others who might report on your products or services. |
| Product Launch | Introduce new products or services. |
| Up Sell | Encourage your target audience members to purchase products or services that are of higher value or more expensive than those that they already intend to buy. |

PeopleSoft delivers the following status codes:

| Status Code | Status | Description |
|---|---|---|
| APPR | Approved | Approved by reviewer. |
| ARCH | Archived | Hidden from standard view. You can find archived campaigns and activities only by entering *Archived* in your search parameters. |
| CMPL | Completed | Ended on the established campaign end date. |
| DCLN | Decline | Declined by reviewer. |
| EXEC | Executing | Being carried out.<br><br>Before you can change a campaign or wave status to *Executing,* the statuses of three associated elements must be as follows:<br><br>Content must have the status *Completed.*<br><br>Offers must have the status *Completed.*<br><br>Audiences must have the status of either *Approved* or *Committed.*<br><br>The EXEC (executing) status drives a number of actions within PeopleSoft Marketing. For example, setting the status of a campaign to *Executing* enables you to set associated activities to *Executing,* also.<br><br>Setting an activity to *Executing* causes the system to validate any associated audiences, content, offers, and scripts. Associated audiences are also set to a status of *Committed.* Also, if the activity channel execution method is *SFA* or *TELM,* associated audiences' leads are "pushed" to the PeopleSoft Sales and PeopleSoft Telemarketing applications. |
| IREV | In Review | In review. |
| NEW | New | Initial design phase. |
| STOP | Stopped | Canceled before the established campaign end date. |
| TRIG | Trigger Approved | Approved by the reviewer and ready to switch to *Execution* status by means of a trigger (not manually). |

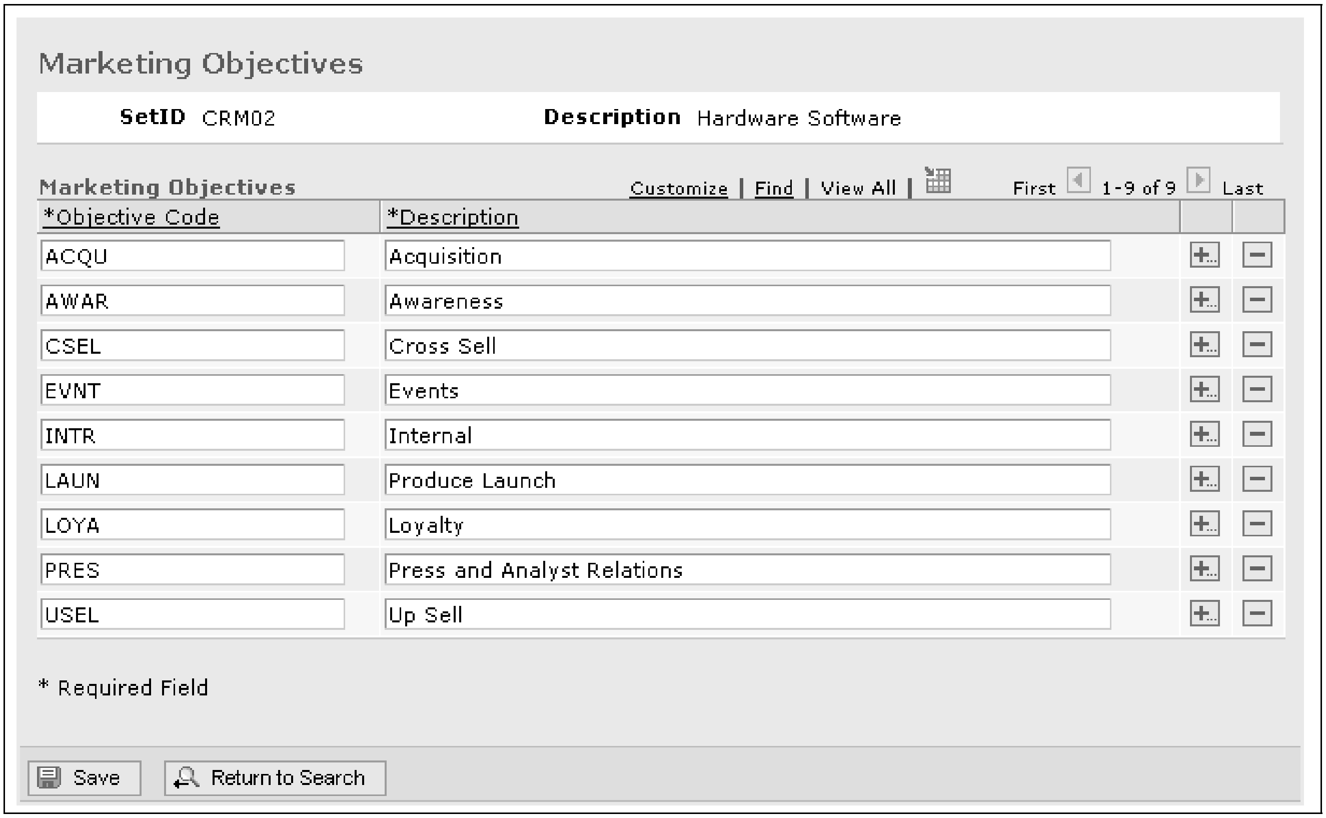
## Pages Used to Define Campaign Elements

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Marketing Objectives | RA_UD_CMPGN_OBJ | Set Up CRM, Product Related, Marketing, Objectives, Marketing Objectives | Define campaign, dialog, and activity objectives. |
| Campaign and Activity Statuses | RA_UD_CMPGN_STAT | Set Up CRM, Product Related, Marketing, Campaigns, Statuses, Campaign and Activity Statuses | Define campaign and activity statuses. |
| Status Rules | RA_UD_STAT_CMB1 | Set Up CRM, Product Related, Marketing, Campaigns, Status Rules, Status Rules | Define status rules, by establishing valid status changes for campaign objects. |
| Budget Sources | RA_UD_BUDGT_SRC | Set Up CRM, Product Related, Marketing, Campaigns, Budget Sources, Budget Sources | Define budget sources. |
| Program Control | RA_PROGRAM_CONTROL | Set Up CRM, Product Related, Marketing, Campaigns, Program Control, Program Control | Define information about Marketing Programs. |
| Trigger Schedules | RA_SCHEDULE | Set Up CRM, Product Related, Marketing, Campaigns, Trigger Schedules, Trigger Schedules | Define trigger schedules, by setting up system schedules to check when to execute campaign triggers. |

## Defining Objectives

To define marketing objectives, use the Marketing Objectives RA_UD_CMPGN_OBJ) component.

Access the Marketing Objectives page.




Marketing Objectives page

Objective codes describe the goals of a Campaign, a Campaign Activity and, if you have purchased PeopleSoft Online Marketing, an Online Dialog. Objectives are associated with Campaigns on the Program Detail page and Activities on the Activity Details page.

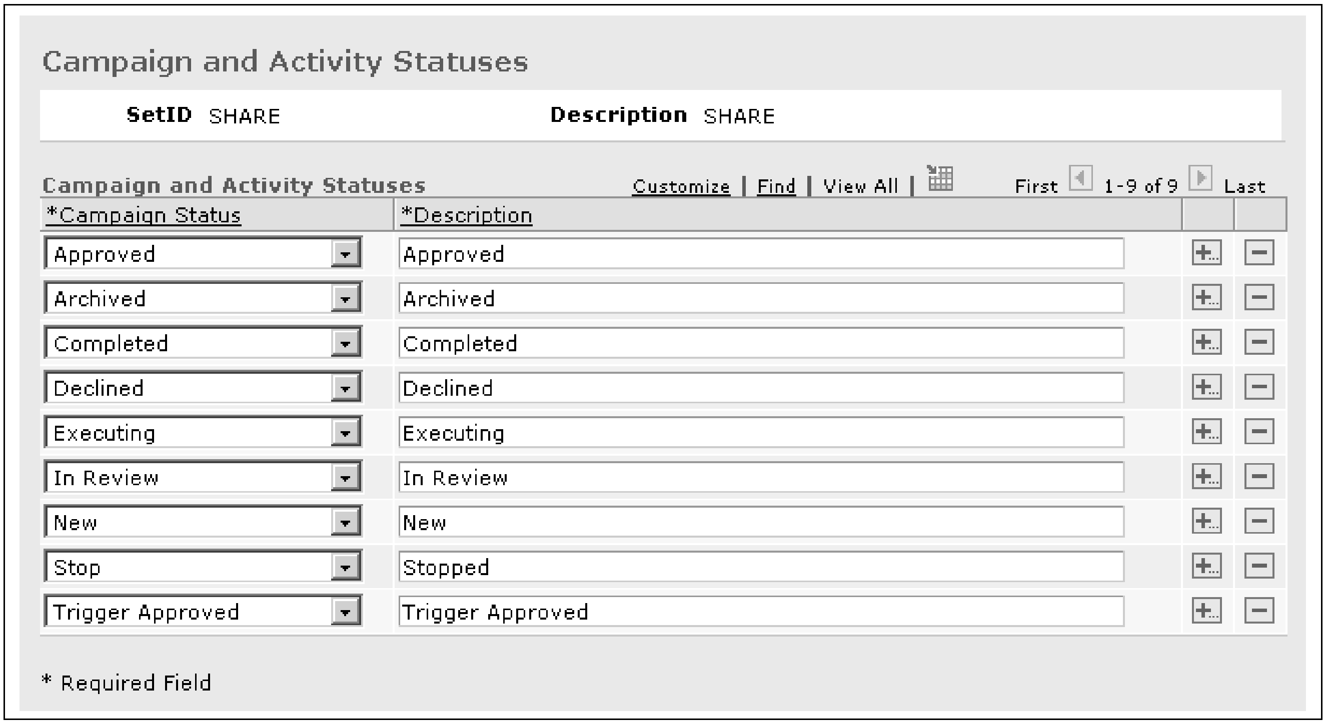
**Objective Code** Enter a code that identifies the objective.

**Description** Enter a description of the objective code.

## Defining Campaign and Activity Statuses

To define campaign and activity statuses, use the Campaign and Activity Statuses (RA_UD_CMPGN_STAT) component.

Access the Campaign and Activity Statuses page.




Campaign and Activity Statuses page

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

**Campaign Status** Enter the code that identifies the campaign and activities status. PeopleSoft delivers a set of status codes under the SHARE setID. Do not modify the delivered values. You may add new values.

**Description** Enter a description of the status code.

---

**Note.** Campaign and activity statuses are identical objects, although you use them separately.

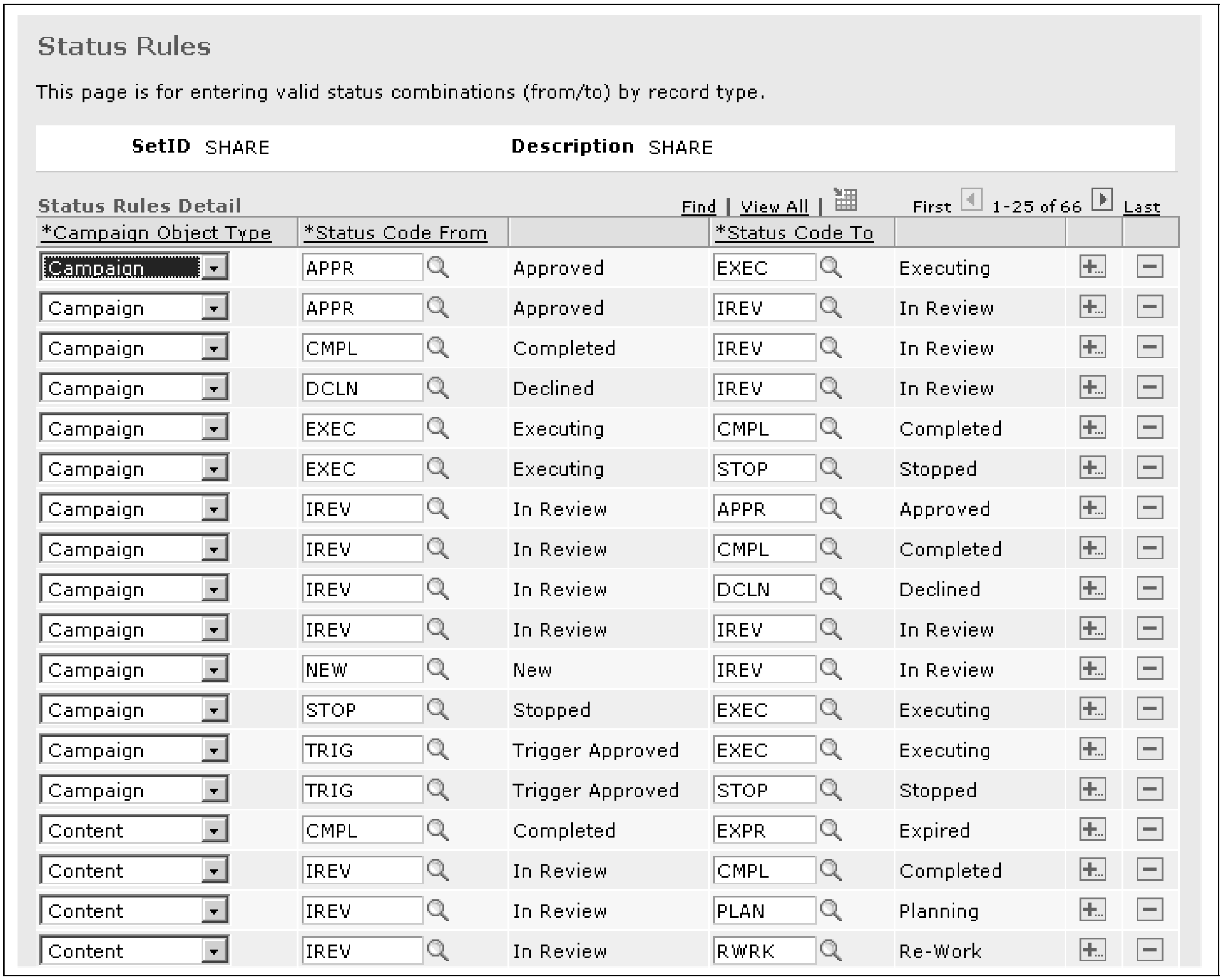
Do not change or remove campaign object statuses that PeopleSoft delivers predefined with your system. If you define new statuses, then you must also define new status rules.

---

## Defining Status Rules

To define status rules, use the Status Rules (RA_UD_STAT_CMB1) component.

Access the Status Rules page.



## Status Rules

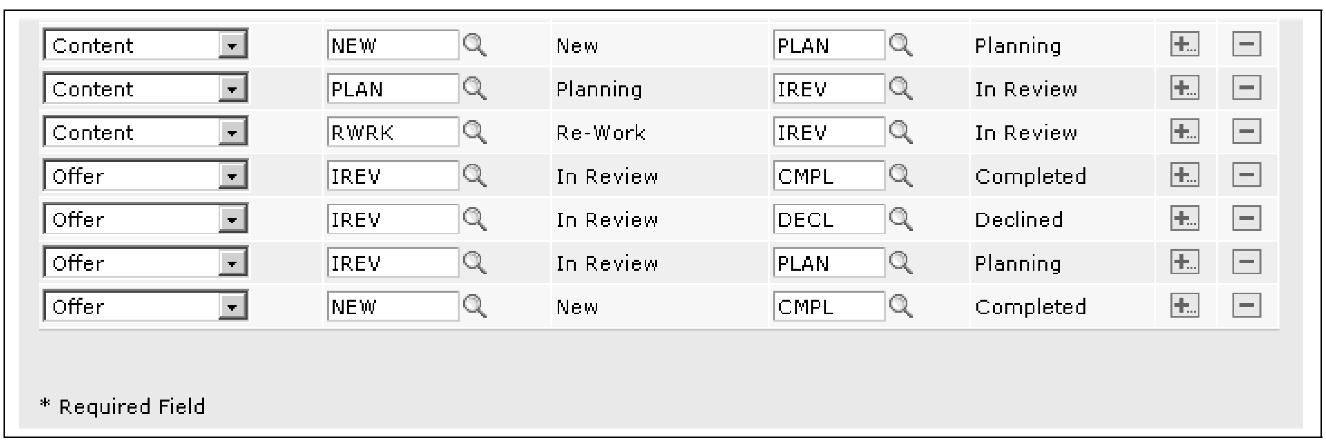
This page is for entering valid status combinations (from/to) by record type.

**SetID** SHARE **Description** SHARE

**Status Rules Detail** Find | View All | First 1-25 of 66 Last

| *Campaign Object Type | *Status Code From | | *Status Code To | | | |
|---|---|---|---|---|---|---|
| Campaign | APPR | Approved | EXEC | Executing | | |
| Campaign | APPR | Approved | IREV | In Review | | |
| Campaign | CMPL | Completed | IREV | In Review | | |
| Campaign | DCLN | Declined | IREV | In Review | | |
| Campaign | EXEC | Executing | CMPL | Completed | | |
| Campaign | EXEC | Executing | STOP | Stopped | | |
| Campaign | IREV | In Review | APPR | Approved | | |
| Campaign | IREV | In Review | CMPL | Completed | | |
| Campaign | IREV | In Review | DCLN | Declined | | |
| Campaign | IREV | In Review | IREV | In Review | | |
| Campaign | NEW | New | IREV | In Review | | |
| Campaign | STOP | Stopped | EXEC | Executing | | |
| Campaign | TRIG | Trigger Approved | EXEC | Executing | | |
| Campaign | TRIG | Trigger Approved | STOP | Stopped | | |
| Content | CMPL | Completed | EXPR | Expired | | |
| Content | IREV | In Review | CMPL | Completed | | |
| Content | IREV | In Review | PLAN | Planning | | |
| Content | IREV | In Review | RWRK | Re-Work | | |

Status Rules page (1 of 2)



| | | | | | | |
|---|---|---|---|---|---|---|
| Content | NEW | New | PLAN | Planning | | |
| Content | PLAN | Planning | IREV | In Review | | |
| Content | RWRK | Re-Work | IREV | In Review | | |
| Offer | IREV | In Review | CMPL | Completed | | |
| Offer | IREV | In Review | DECL | Declined | | |
| Offer | IREV | In Review | PLAN | Planning | | |
| Offer | NEW | New | CMPL | Completed | | |

* Required Field

Status Rules page (2 of 2)

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

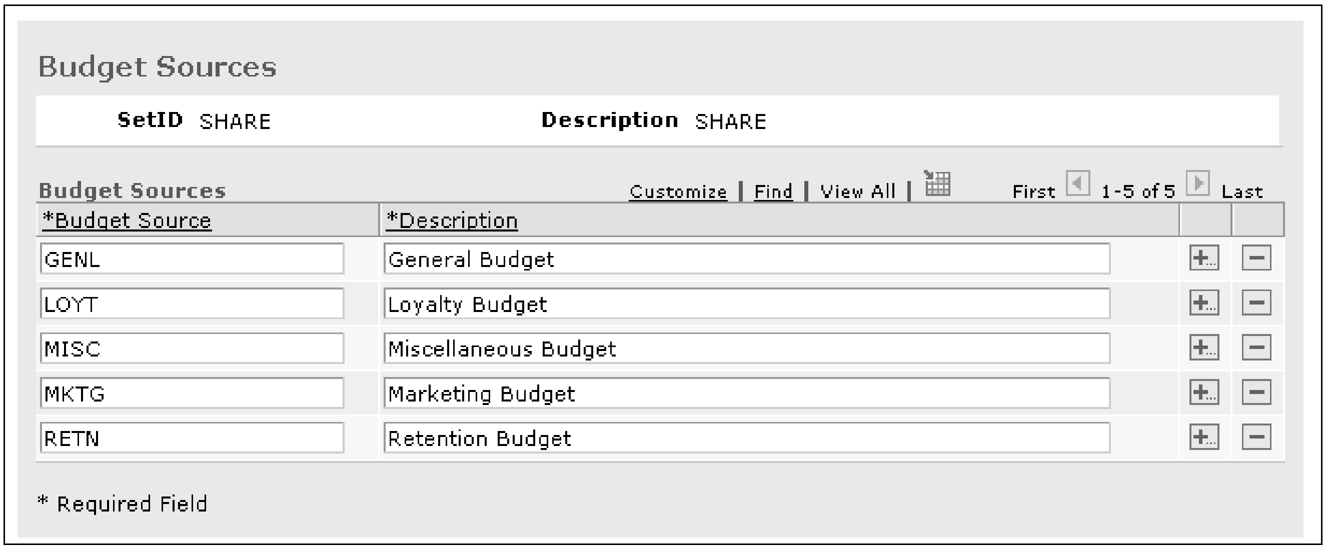
PeopleSoft delivers common status rules with your PeopleSoft Marketing system. You may add new rules as needed.

| | |
|---|---|
| **Campaign Object Type** | Select the campaign object type to which the status rule applies. Values are: *Campaign, Campaign Task, Campaign Activity, Content, Content Task,* and *Offer.* |
| **Status Code From** and **Status Code To** | Select status values for before and after the change. The values that are available depend on the object type selected. |

## Defining Budget Sources

To define budget sources, use the Budget Sources (RA_UD_BUDGT_SRC) component.

Access the Budget Sources page.



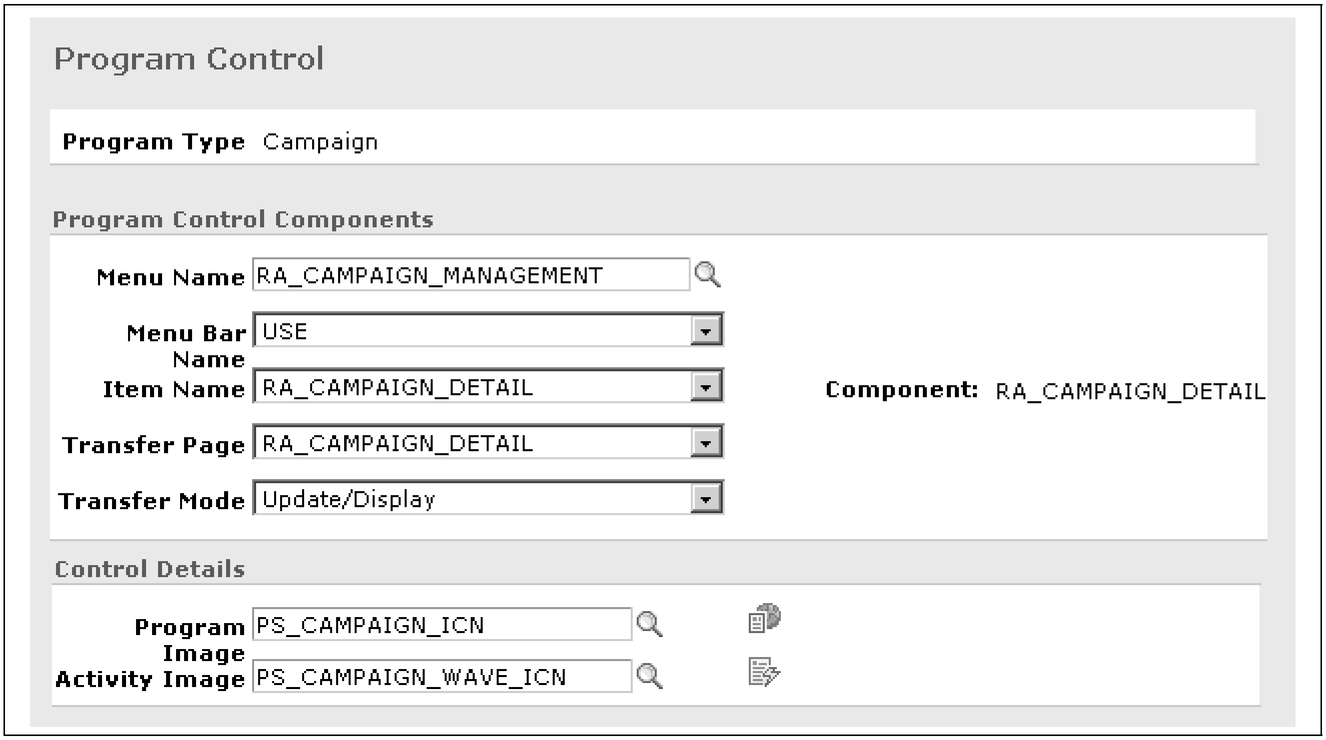

Budget Sources page

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

| | |
|---|---|
| **Budget Source** | Enter a code that identifies the budget source. |
| **Description** | Enter a description of the budget source code. |

## Defining Program Control

Access the Program Control page.




Program Control page

**Program Type** Select Campaign, Rollup, or Dialog.

**Menu Name** The Menu Name item is delivered as part of system data—you should not modify it.

**Menu Bar Item** The Menu Bar item is delivered as part of system data—you should not modify it.

**Item Name** The Item Name item is delivered as part of system data—you should not modify it.

**Transfer Page** The Transfer Page item is delivered as part of system data—you should not modify it.

**Transfer Mode** The Transfer Mode item is delivered as part of system data—you should not modify it.

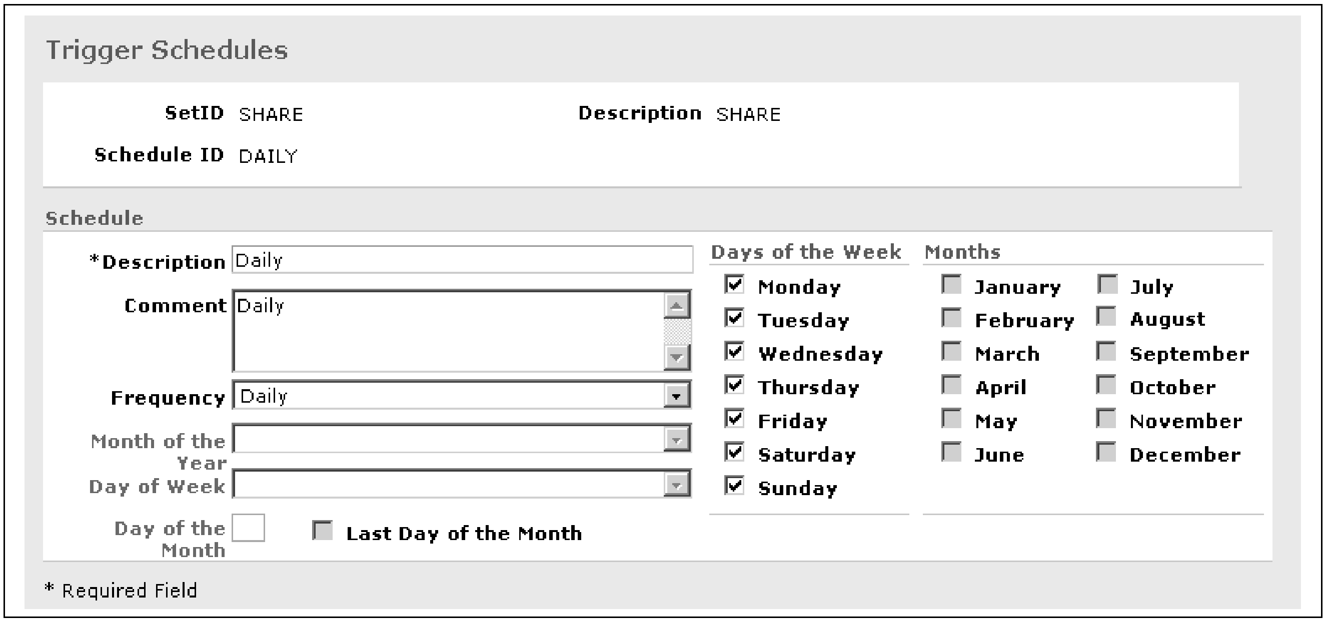
**Program Image** The button used in conjunction with marketing programs. You can replace it with a different image.

**Activity Image** The button used in conjunction with activities. You can replace it with a different image.

## Defining Trigger Schedules

To define trigger schedules, use the Trigger Schedules (RA_SCHEDULE) component.

Access the Trigger Schedules page.




Trigger Schedules page

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

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

**Description** Enter a full description of the campaign trigger schedule.

**Frequency** Select the frequency with which the system checks campaign conditions pursuant to executing campaign triggers. Values are:

*Annually:* System checks campaign conditions annually. When you select this value, the Month and Day of the Month fields become available, so that you can specify the date when the system checks campaign conditions every year.

For example, you can set up your system to check campaign conditions every year on June 30.

*Daily:* System checks campaign conditions every week on specified days. When you select this value, the Day of Week field becomes available so that you can specify the days each week when the system checks campaign conditions.

For example, you can set up your system to check campaign conditions every Monday, Wednesday, and Friday.

**Note.** Select *Daily* to check campaign conditions multiple times each week.

*Monthly:* System checks campaign conditions every year on specified months. When you select this value, the Month, Day of the Month, and Last Day of the Month fields become available, so that you can specify the day of the specified month when the system checks campaign conditions.

For example, you can set up your system to check campaign conditions on the first day of January, April, July, and October.

*User Defn* (user defined): This value is reserved for future use.

*Weekly:* System checks campaign conditions every week on a specified day. When you select this value, the Day of Week field becomes available, so that you can specify the day when the system checks campaign conditions every week.

For example, you can set up your system to check campaign conditions every Tuesday.

**Note.** Select *Weekly* to check campaign conditions only once a week.

**Month of the Year** Select the month when the system is to check campaign conditions every year. This field is editable only when you select *Annually* in the Frequency field.

**Day of Week** Select the day of the week when the system is to check campaign conditions. This field is available only when you select *Weekly* in the Frequency field.

**Day of the Month** Select the day of the month when the system is to check campaign conditions. This field is editable only when you select either *Monthly* or *Annually* in the Frequency field.

**Last Day of the Month** Select when the system is to check campaign conditions on the last day of the month (February 28, April 30, July 31, and so forth). This field is available only when you select *Monthly* in the Frequency field.

**Days of the Week** Select the days of the week on which the system is to check campaign conditions. This field is available only when you select *Daily* in the Frequency field.

**Months** Select the months in which the system is to check campaign conditions each year. This field is available only when you select *Monthly* in the Frequency field.

# Defining Channel Elements

This section provides an overview of channel elements and discusses how to:

- Define channel activities.
- Define marketing channels.
- Define channel details.

## Understanding Channel Elements

PeopleSoft delivers the following activity codes with the system. You may add additional values:

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

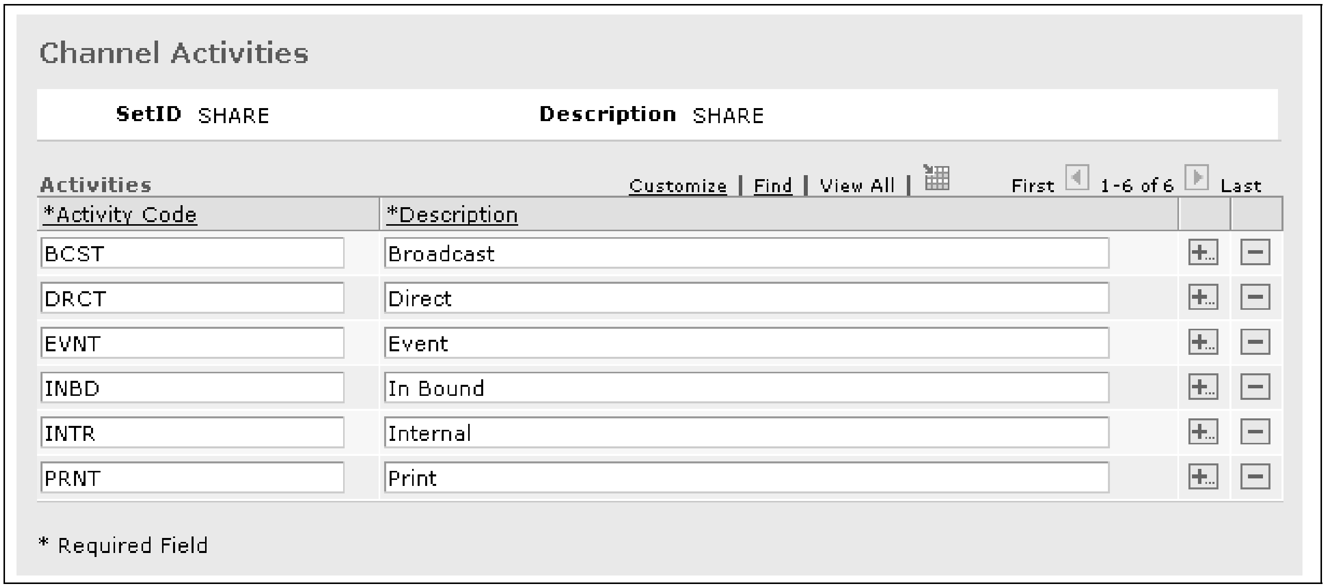
## Pages Used to Define Channel Elements

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Channel Activities | RA_UD_ACTIVITY | Set Up CRM, Product Related, Marketing, Channels, Activities, Channel Activities | Define channel activities. |
| Marketing Channels | RA_UD_CHNL_TYPE | Set Up CRM, Product Related, Marketing, Channels, Marketing Channel | Define marketing channels. |
| Channels | RA_UD_CHANNEL | Set Up CRM, Product Related, Marketing, Channels, Channels, Channel Details | Define channel details. |

## Defining Channel Activities

To define channel activities, use the Channel Activities (RA_UD_ACTIVITY) component.

Access the Channel Activities page.



Channel Activities page

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

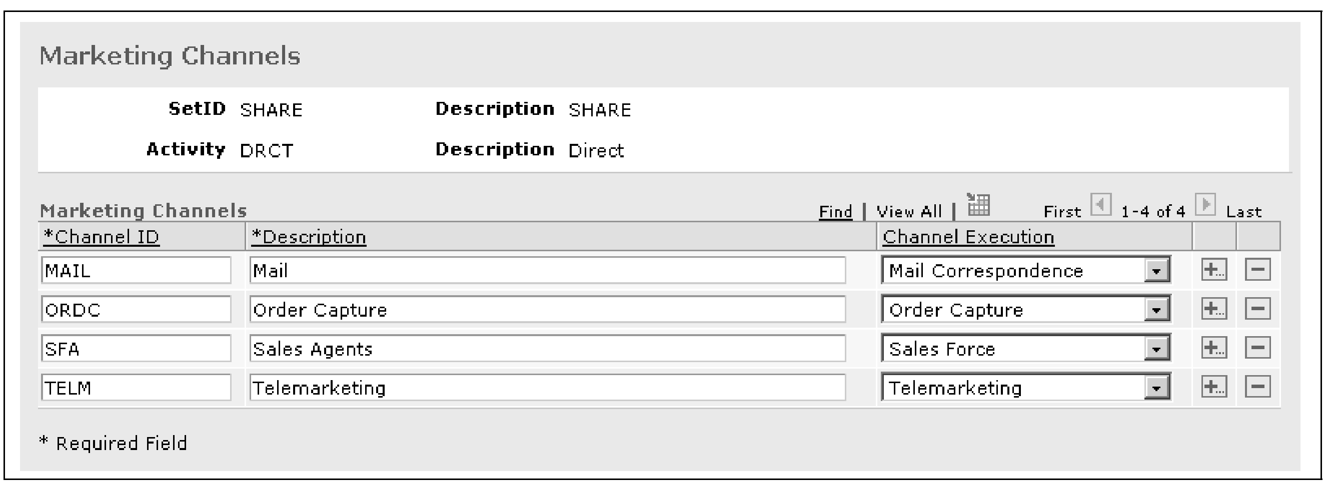
**Activity Code** Enter a code that identifies the channel activity.

**Description** Enter a description of the channel activity.

## Defining Marketing Channels

To define marketing channels, use the Marketing Channels (RA_UD_CHNL_TYPE) component.

Access the Marketing Channels page.



Marketing Channels page

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

**Channel ID** Enter a code that identifies the marketing channel.

**Marketing Channel** Enter a description of the marketing channel. This description appears when the marketing channel is selected on the Campaign - Activities detail page.

**Channel Execution** Channel execution indicators drive the behavior of an activity once it is set to *Executing* (EXEC) status. Select a channel execution method. Values are:

*Mail Correspondence:* Select to execute the marketing activity through direct mail. This method enables the user to use Correspondence Management to generate document merges.

*Order Capture:* Select to indicate that campaign activity is intended for internal use by the PeopleSoft Order Capture application. The result of this is that customers defined in the audience associated with this campaign activity are potentially eligible for up-sell or cross-sell promotions.

*Sales Force:* Select to indicate that the execution channel for the campaign activity is Sales. Once the campaign activity is set to Executing, the audience associated with the campaign activity is pushed to the PeopleSoft Sales application as a group of sales leads.

*Telemarketing:* Select to execute the marketing activity through PeopleSoft Telemarketing. Once an activity is set to Executing, the audience associated with the campaign activity is pushed to the PeopleSoft Telemarketing application as a group of telemarketing leads.

*Advisor/Cross Sell:* Allows for execution of marketing activities in cross sell situations.

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**Note.** The value that you select in the Channel Execution field provides the sole control over which channel is used. The value that appears in the Marketing Channel field is merely a description.

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## Defining Channel Details

To define channel details, use the Channels (RA_UD_CHANNEL) component.

Access the Channels page.

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

**Channel** Enter a code that identifies the channel.

**Description** Enter a description of the specific media outlet.

### See Also

Chapter 9, “Creating Campaigns and Activities,” Defining Activities, page 122

# Defining Content Elements

Content refers to any materials used to deliver your campaign message. Content can be collateral material such as a flyer or magazine insert, a radio or television ad, or a script used by a telemarketing caller.

This section discusses how to:

- Define content types.
- Define content subtypes.

## Pages Used to Define Content Elements

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Content Types | RA_UD_CONT_TYPE | Set Up CRM, Product Related, Marketing, Content, Types, Content Types | Define content types. |
| Content Subtypes | RA_UD_CNT_STYPE | Set Up CRM, Product Related, Marketing, Content, SubTypes, Content Subtypes | Define content subtypes. |

## Defining Content Types

To define content types, use the Content Types (RA_UD_CONT_TYPE) component.

Access the Content Types page.

Use content types to define broad categories of content.

**Content Type** Enter a code that identifies the content type.

**Description** Enter a description of the content type.

## Defining Content Subtypes

To define content subtypes, use the Content Subtypes (RA_UD_CNT_STYPE) component.

Access the Content Subtypes page.

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

**Content SubType** Enter a code that identifies the content subtype.

**Description** Enter a description of the specific content subtype.

# Defining and Creating Metrics

This section provides an overview of metrics and discusses how to:

- Define metric types.
- Define metric subtypes.
- View a summary of existing metrics.
- Create new metrics.

## Understanding Metrics

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

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

PeopleSoft Marketing is delivered with the following predefined metrics:

| Metric Name | Description | Unit of Measure |
|---|---|---|
| Contact Rates-Outbound Mktng (conversion rates-outbound marketing) | Campaign activity level | Percentage |
| Conversion Rates-Outbound Mktng (conversion rates-outbound marketing) | Campaign activity level | Percentage |
| Cost | Campaign activity level | Currency amount |
| Cost | Campaign level | Currency amount |
| Cost | Rollup level | Currency amount |
| Cost per Lead | Campaign activity level | Currency amount |
| Cost per Lead | Campaign level | Currency amount |
| Cost per Lead | Rollup level | Currency amount |
| Cost per Quote | Campaign activity level | Currency amount |
| Cost per Quote | Campaign level | Currency amount |
| Cost per Quote | Rollup level | Currency amount |
| Do Not Call Rate-Outbound Mktng (do not call rate-outbound marketing) | Campaign activity level | Percentage |
| Lead to Quote ratio | Campaign activity level | Percentage |
| Lead to Quote ratio | Campaign level | Percentage |

| Metric Name | Description | Unit of Measure |
|---|---|---|
| Lead to Quote ratio | Rollup level | Percentage |
| No. of Leads (number of leads) | Campaign activity level | Count |
| No. of Leads (number of leads) | Campaign level | Count |
| No. of Leads (number of leads) | Rollup level | Count |
| No. of Opportunities (number of opportunities) | Campaign activity level | Count |
| No. of Opportunities (number of opportunities) | Campaign level | Count |
| No. of Opportunities (number of opportunities) | Rollup level | Count |
| No. of Quotes (number of quotes) | Campaign activity level | Count |
| No. of Quotes (number of quotes) | Campaign level | Count |
| No. of Quotes (number of quotes) | Rollup level | Count |
| No. of Responses (number of responses) | Campaign activity level | Count |
| No. of Responses (number of responses) | Campaign level | Count |
| No. of Responses (number of responses) | Rollup level | Count |
| Opportunity Rate-Outbound Mktg (opportunity rate-outbound marketing) | Campaign activity level | Percentage |
| Opportunity to Quote ratio | Campaign activity level | Percentage |
| Opportunity to Quote ratio | Campaign level | Percentage |
| Opportunity to Quote ratio | Rollup level | Percentage |

| Metric Name | Description | Unit of Measure |
|---|---|---|
| Response Rate | Campaign activity level | Percentage |
| Response Rate | Campaign level | Percentage |
| Response Rate | Rollup level | Percentage |
| Response Rate-Outbound Mktng (response rate-outbound marketing | Campaign activity level | Percentage |
| Revenue | Campaign activity level | Currency amount |
| Revenue | Campaign level | Currency amount |
| Revenue | Rollup level | Currency amount |
| Revenue per Lead | Campaign activity level | Currency amount |
| Revenue per Lead | Campaign level | Currency amount |
| Revenue per Lead | Rollup level | Currency amount |
| Revenue per Quote | Campaign activity level | Currency amount |
| Revenue per Quote | Campaign level | Currency amount |
| Revenue per Quote | Rollup level | Currency amount |
| Revenue Variance | Rollup level | Currency amount |
| ROI (return on investment) | Campaign activity level | Currency amount |
| ROI (return on investment) | Campaign level | Currency amount |
| ROI (return on investment) | Rollup level | Currency amount |

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

- Campaigns - Define Activities: Detail page.
- Campaigns - Triggers page.

- Campaigns - Performance page.
- Audiences - Costs page.
- Content - Costs page.

See Chapter 9, “Creating Campaigns and Activities,” Define a Trigger, page 127; Chapter 9, “Creating Campaigns and Activities,” Measuring Campaign Effectiveness, page 137; Chapter 7, “Using Audiences,” Associating Costs with an Audience or Segment, page 89; Chapter 9, “Creating Campaigns and Activities,” Defining Activities, page 122 and Chapter 5, “Creating Campaign Content,” Entering the Costs of Creating Content, page 57.

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

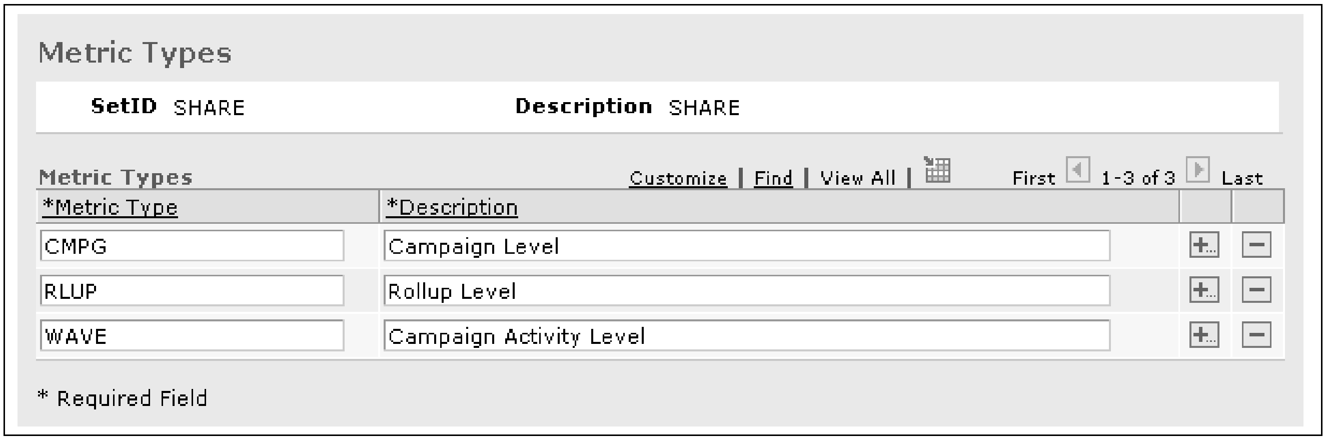
## Pages Used to Define and Create Metrics

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Metric Types | RA_UD_MET_TYPE | Set Up CRM, Product Related, Marketing, Metrics, Types, Metric Types | Define metric types. |
| Metric Subtypes | RA_UD_MET_STYPE | Set Up CRM, Product Related, Marketing, Metrics, SubTypes, Metric Subtypes | Define metric subtypes. |
| Metric Detail | RA_METRICS_SUMM | Set Up CRM, Product Related, Marketing, Metrics, Detail | View summary information about all existing metrics under a setID. |
| Performance Metric Details | RA_METRICS | • To edit an existing metric, click the Metric Name link on the Metric Detail page.<br>• To create a new metric, click the Add Metric button on the Metric Detail page. | Define and review metrics. |

## Defining Metric Types

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

Access the Metric Types page.




Metric Types page

Metric types classify the types of metrics that you create.

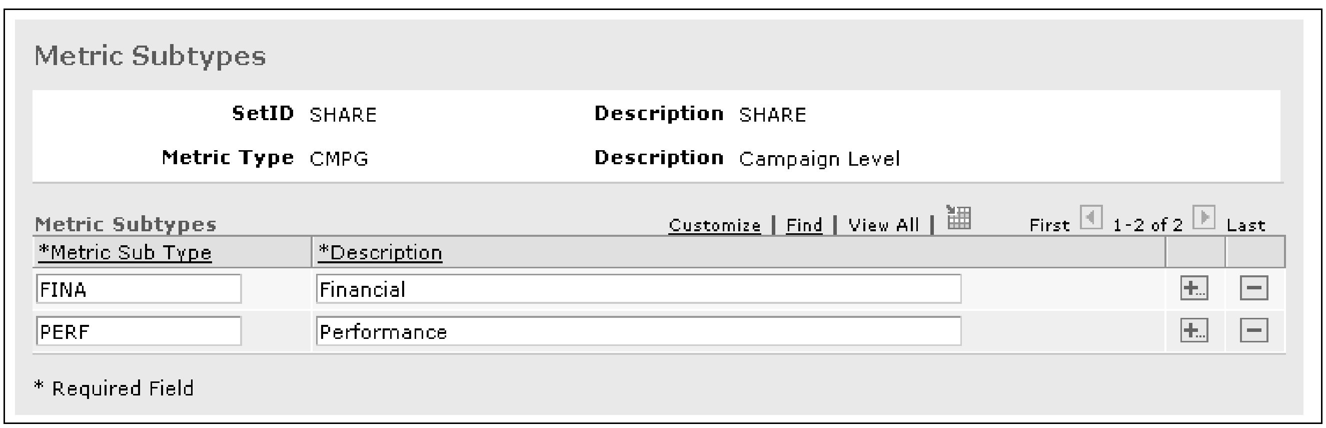
**Metric Type** Enter a code that identifies the metric type. Delivered values are CMPG (Campaign level), RLUP (Rollup level), and WAVE (Campaign Activity level).

**Description** Enter a description of the general metric type.

## Defining Metric Subtypes

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

Access the Metric Subtypes page.




Metric Subtypes page

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

**Metric Sub Type** Enter a code that identifies the metric subtype.

**Description** Enter a description of the metric subtype.

## Viewing a Summary of Existing Metrics

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

Access the Metric Detail page.

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

**Metric Name**
Displays a descriptive name of the metric.

Click to access the Performance Metric Details page, where you can edit an existing metric.

**Unit Of Measure**
Displays the unit of measure used in the metric. Values are:

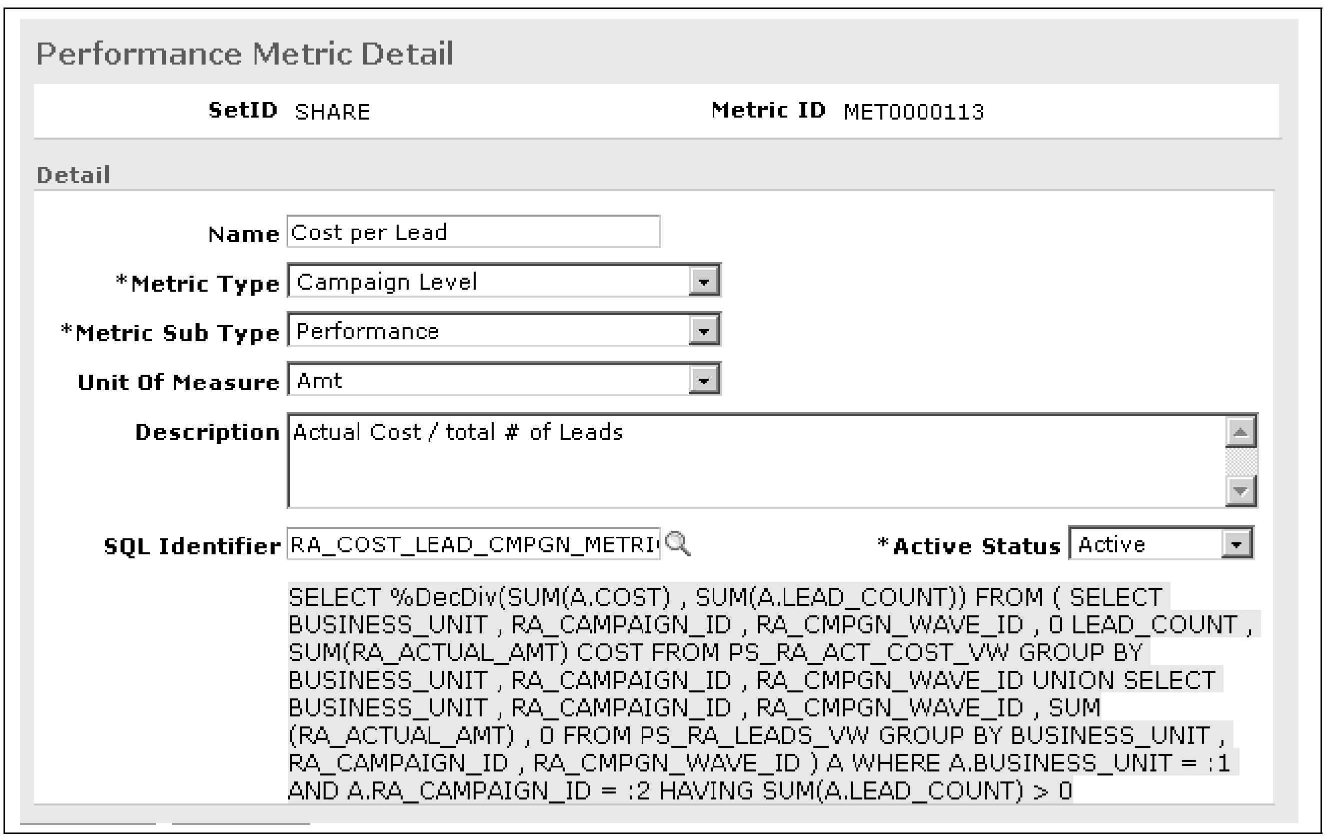
- *%:* Percentage of total.
- *Count:* Number of the item being measured. For example, the number of leads, responses, or quotes.
- *Amount:* Currency amount.
- *Units:* Number of units.

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

**Add Metric**
Add and define additional metrics.

## Creating New Metrics

Access the Performance Metric Detail page.



Performance Metric Detail page

---

***Warning!*** Every metric has an associated Structured Query Language (SQL) object that contains a SQL statement. The SQL statement governs the metric's calculations. SQL objects (and statements) are predefined for the metrics that PeopleSoft delivers with your system.

To create custom metrics, you must first define the accompanying SQL objects and statements using PeopleSoft Application Designer. SQL objects designed to govern PeopleSoft Marketing metrics must have names that begin with the prefix RA_. Save such SQL objects in the PeopleTools dictionary of your PeopleSoft Customer Relationship Management database.

---

**SetID** Displays the setID within which the metric resides.

**Metric ID** Displays the system-generated code that identifies the metric.

**Name** Enter a descriptive name for the metric.

**Metric Type** Select the type of object to be analyzed. Values are:

- *CMPG —Campaign*
- *WAVE — Activity*
- *RLUP — Campaign Rollup*

**Metric Sub Type** Define the nature of the analysis. Values are:

- *Performance*
- *Financial*

**SQL Identifier** (Structured Query Language identifier) Select a unique identifier of the SQL object that contains the SQL statement that governs the metric?s calculations.

**Active Status** Select the metric?s status. Values are: *Active* or *Inactive.*

**SQL Stmt Text** (Structured Query Language statement text) Displays the SQL statement that governs the metric?s calculations.

## Defining Cost Elements

This section discusses how to:

- Define cost types.
- Define costs.
- Define channel costs.

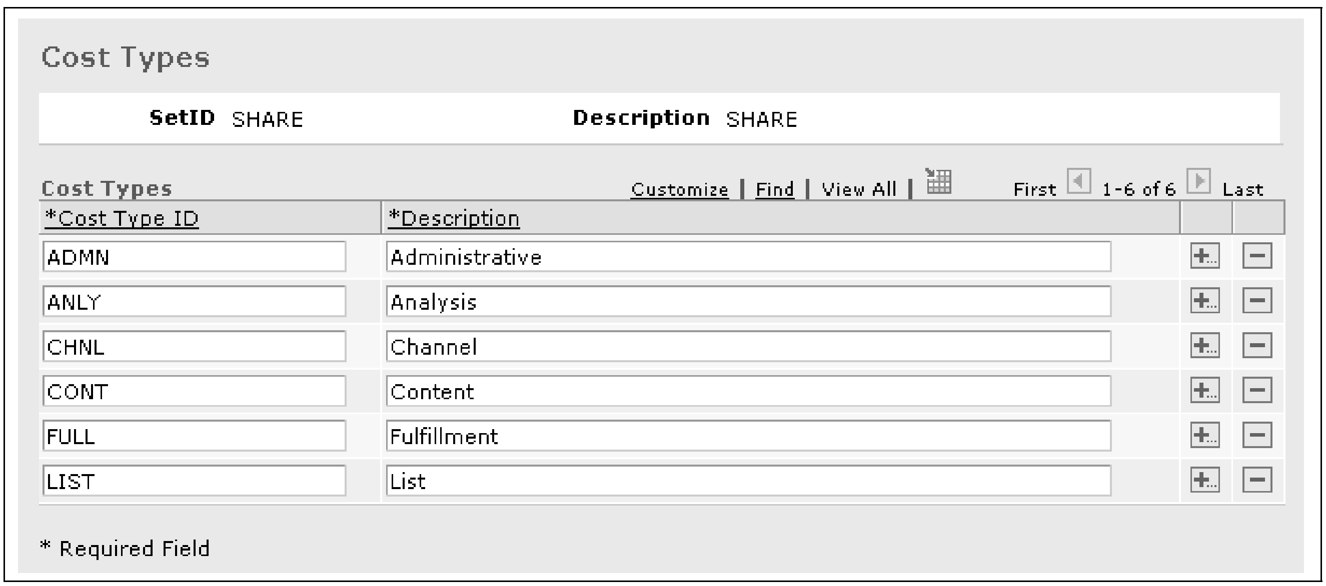
## Pages Used to Define Cost Elements

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Cost Types | RA_UD_COST_TYPE | Set Up CRM, Product Related, Marketing, Costs, Types, Cost Types | Define cost types associated with campaigns. |
| Record Costs | RA_COST_METRICS | Set Up CRM, Product Related, Marketing, Costs, Costs | Define the costs that you associate with various campaign objects, including audiences and content. |
| Channel Cost | RA_CHANNEL_COST | Set Up CRM, Product Related, Marketing, Costs, Channel Cost | Define default costs associated with a specific campaign channel. |

## Defining Cost Types

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

Access the Cost Types page.




Cost Types page

Use cost type codes to categorize campaign costs.

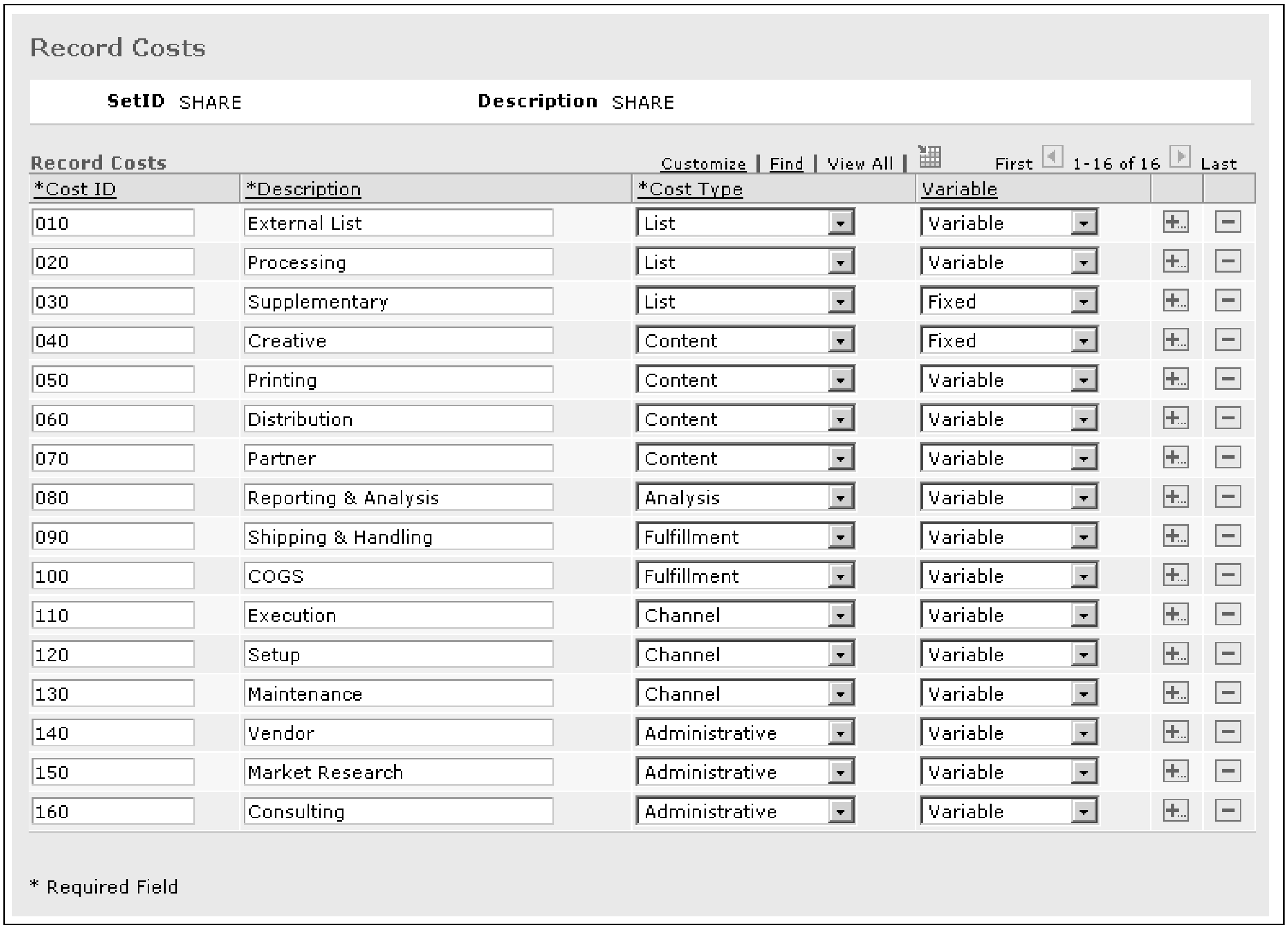
**Cost Type ID** Enter a code that identifies the cost type.

**Description** Enter a description of the cost type.

## Defining Costs

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

Access the Record Costs page.



Record Costs

**SetID** SHARE **Description** SHARE

Record Costs Customize | Find | View All | First 1-16 of 16 Last

| *Cost ID | *Description | *Cost Type | Variable |
|---|---|---|---|
| 010 | External List | List | Variable |
| 020 | Processing | List | Variable |
| 030 | Supplementary | List | Fixed |
| 040 | Creative | Content | Fixed |
| 050 | Printing | Content | Variable |
| 060 | Distribution | Content | Variable |
| 070 | Partner | Content | Variable |
| 080 | Reporting & Analysis | Analysis | Variable |
| 090 | Shipping & Handling | Fulfillment | Variable |
| 100 | COGS | Fulfillment | Variable |
| 110 | Execution | Channel | Variable |
| 120 | Setup | Channel | Variable |
| 130 | Maintenance | Channel | Variable |
| 140 | Vendor | Administrative | Variable |
| 150 | Market Research | Administrative | Variable |
| 160 | Consulting | Administrative | Variable |

* Required Field

Record Costs page

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

**Cost ID** Enter a code that identifies the cost.

---

**Note.** Develop a cost ID scheme before you begin setting up your cost ID codes. A good scheme enables you to categorize costs and leaves room for additions when necessary.

---

**Description** Enter a description of the cost.

**Cost Type** Select a cost type that reflects the broad category into which the cost falls.

**Variable** Select whether the cost is variable or fixed.

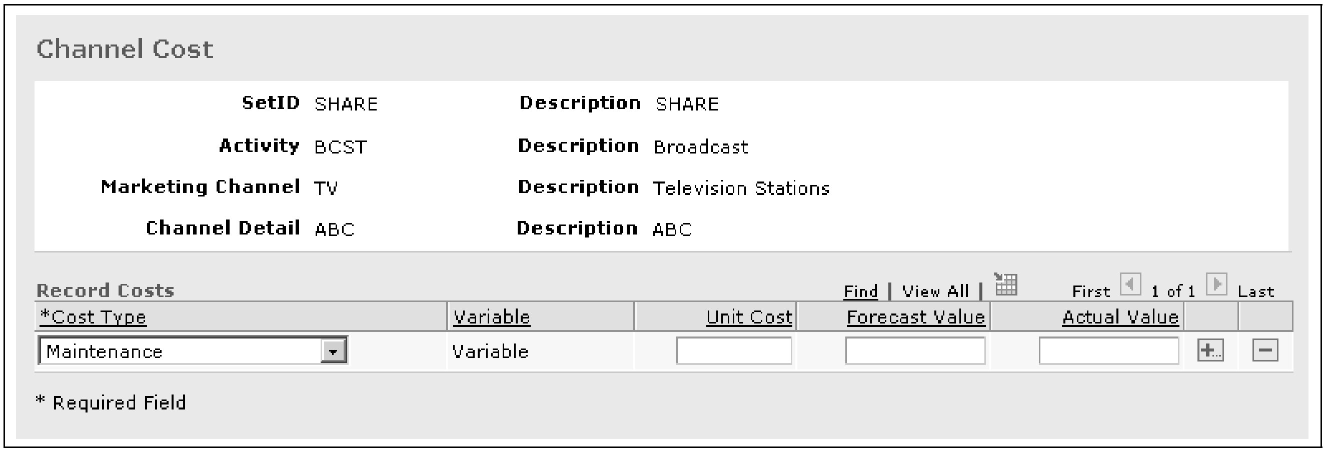
Select *Variable* to enable users to edit the Unit Cost field on either the Campaign Detail - Metrics page or the Campaign Detail - Activity Detail page.

Select *Fixed* to prevent users from altering the Unit Cost field when you enter a value in the Cost field on either the Campaign Detail - Metrics page or the Campaign Detail - Activity Detail page.

## Defining Channel Costs

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

Access the Channel Cost page.




Channel Cost page

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

**Cost Type**
Enter the code that identifies the category of expense to be measured.

**Variable**
When a cost ID is set up as a variable expense, an indicator appears in this check box.

**Unit Cost**
Displays the cost of a single unit of product. For example, a brochure has a unit cost of 1 USD. The total cost of purchasing brochures is determined by the quantity purchased multiplied by the unit cost.

**Planned Cost**
Enter the amount that you expect to pay for all units of the product or service to be measured (quantity multiplied by unit cost).

**Actual Cost**
Enter the amount that you actually pay for all units of the product or service.

**Note.** Under most circumstances, this field should be left blank, because the information is entered on the Campaign Detail - Activities page.

# Defining Audience Information

This section discusses how to limit audience row count, set up saved search audiences, and set up segment groups.

## Page Used to Define Audience Information

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Audience Setup | RA_LIST_CONFIG | Set Up CRM, Product Related, Marketing, Audience Setup, Audience Setup | Limit audience row count, by configuring the maximum number of rows to appear per audience and to include in correspondence requests. |
| Setup Saved Search Audience | RA_CFGSRCH_DEFN | Set Up CRM, Product Related, Marketing, Audiences, Saved Search Audience Setup | Set up saved search audiences. |
| Define Segment Group | RA_SEGMENT_GROUP | Set Up CRM, Product Related, Marketing, Audiences, Segment Group | Set up segment groups. |

## Limiting Audience Row Count

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

Access the Audience Setup page.

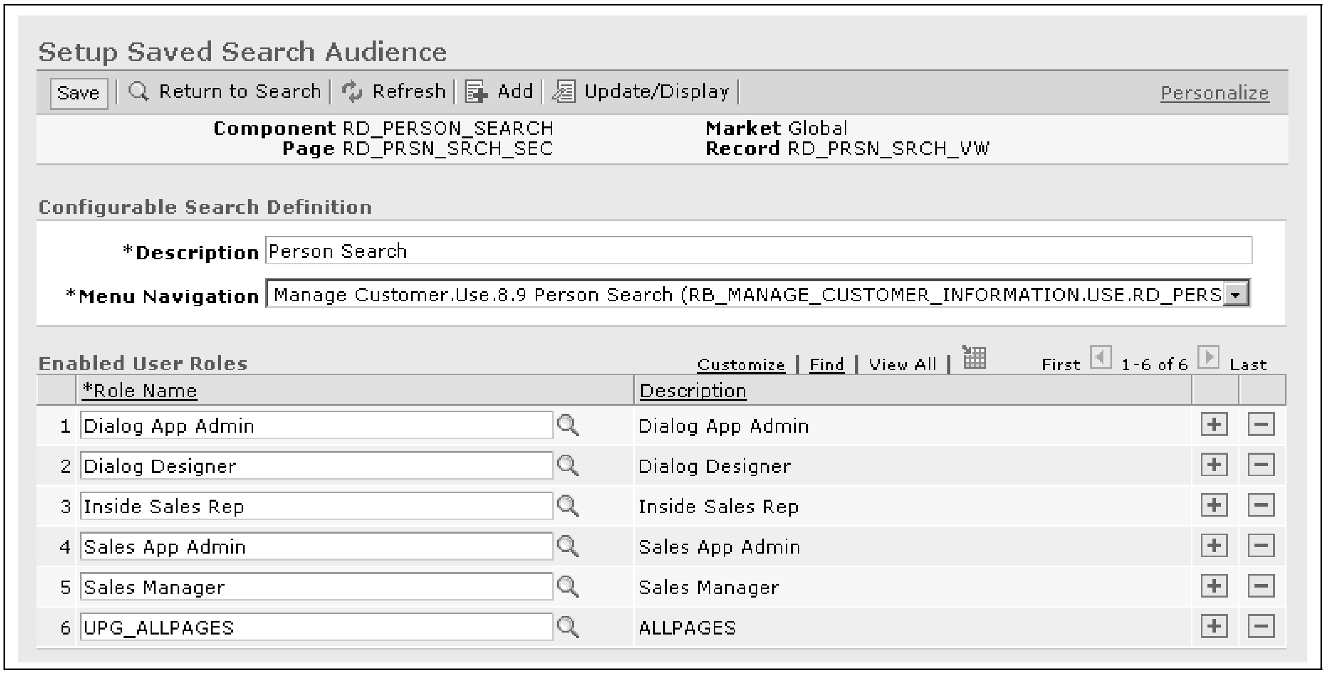
Enter a maximum number of rows to appear per audience. This setting also limits the number of messages generated to audience members through a correspondence request.

Row count does not limit the actual size of an audience, only the number of rows that appear on the screen. The recommended maximum row count is 2000.

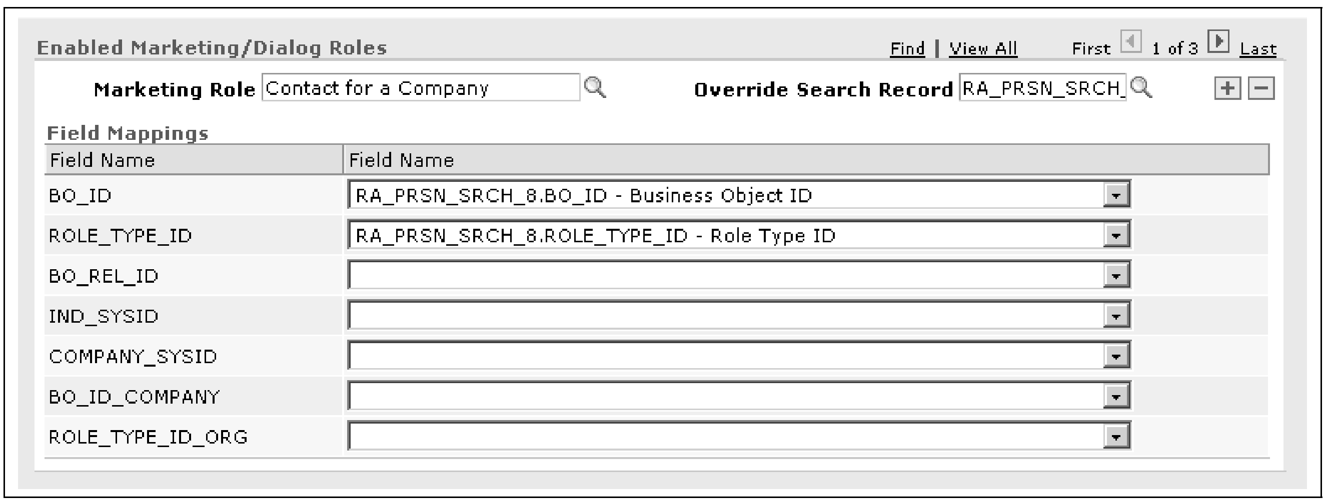
## Setting Up Saved Search Audiences

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

Access the Setup Saved Search Audience page.




Setup Saved Search Audience page (1 of 2)




Setup Saved Search Audience page (2 of 2)

| | |
|---|---|
| **Component** | The configurable search definition component. |
| **Market** | The configurable search definition market. |
| **Page** | The configurable search definition page. |
| **Record** | The configurable search definition search record. |
| **Description** | A brief description of the search. |
| **Menu Navigation** | The Menu.Bar.Item name to use for transfers to the configurable search page. |
| **Enabled User Roles** | The user roles that are allowed to create audiences from this configurable search page. |
| **Enabled Marketing/Dialog Roles** | The Marketing/Dialog target individual roles (role/relationship) that can be extracted from the configurable search results to make up an audience list. |

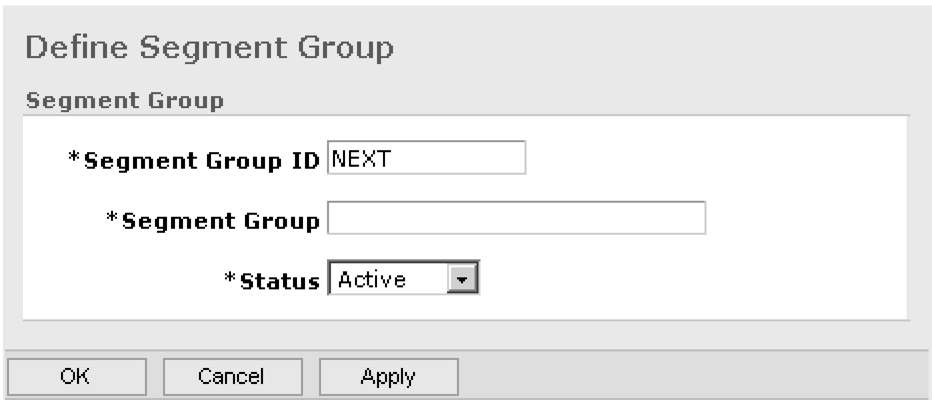
**Override Search Record** — *(Optional)* An alternate search record containing identical fields to the primary search record, plus any additional fields for mapping to a Target type. This search record could be a view that provides additional constraints or joins to affect the search results for the audience.

**Field Mappings** — Mapping of configurable search results to audience results.

## Setting Up Segment Groups

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

Access the Define Segment Group page.




Define Segment Group page

**Segment Group ID** — The unique identifier for the segment group.

**Segment Group** — Enter a name for the segment group.

**Status** — The current status of the segment group: Active or Inactive.

# Defining Task Tools

This section provides an overview of tasks and discusses how to:

- Define task shells.
- Define task sets.

## Understanding Tasks

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

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

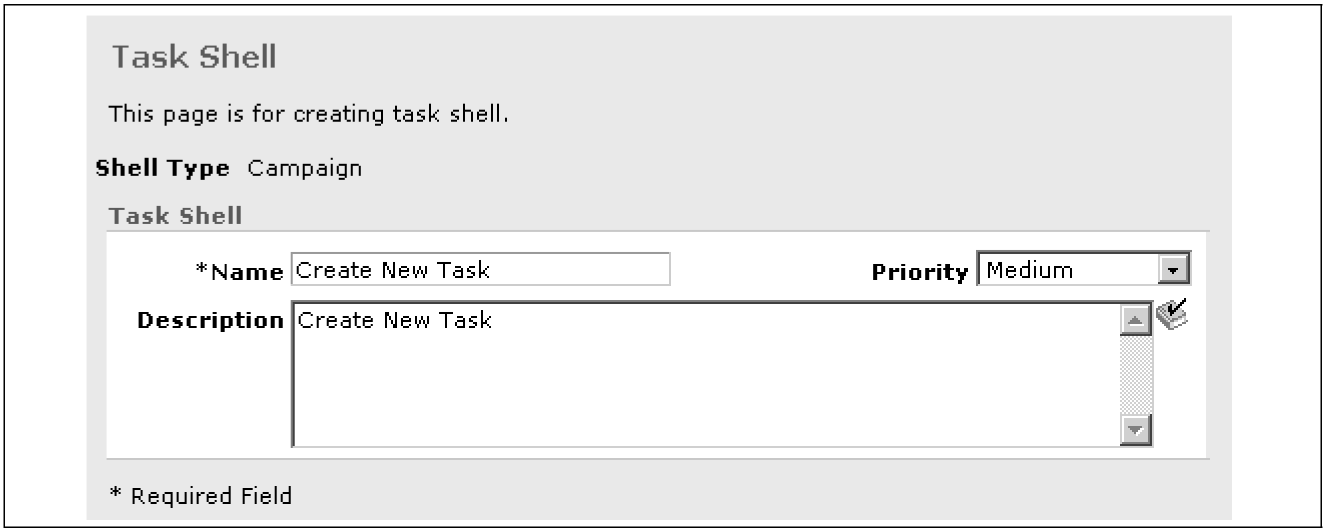
## Pages Used to Define Task Tools

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Task Shells | RA_TASK_SHELL | Set Up CRM, Product Related, Marketing, Task Shell, Task Shell | Define task shells. |
| Task Sets | RA_TASK_GROUP | Set Up CRM, Product Related, Marketing, Task Sets | Define task sets. |

## Defining Task Shells

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

Access the Task Shell page.




Task Shell page

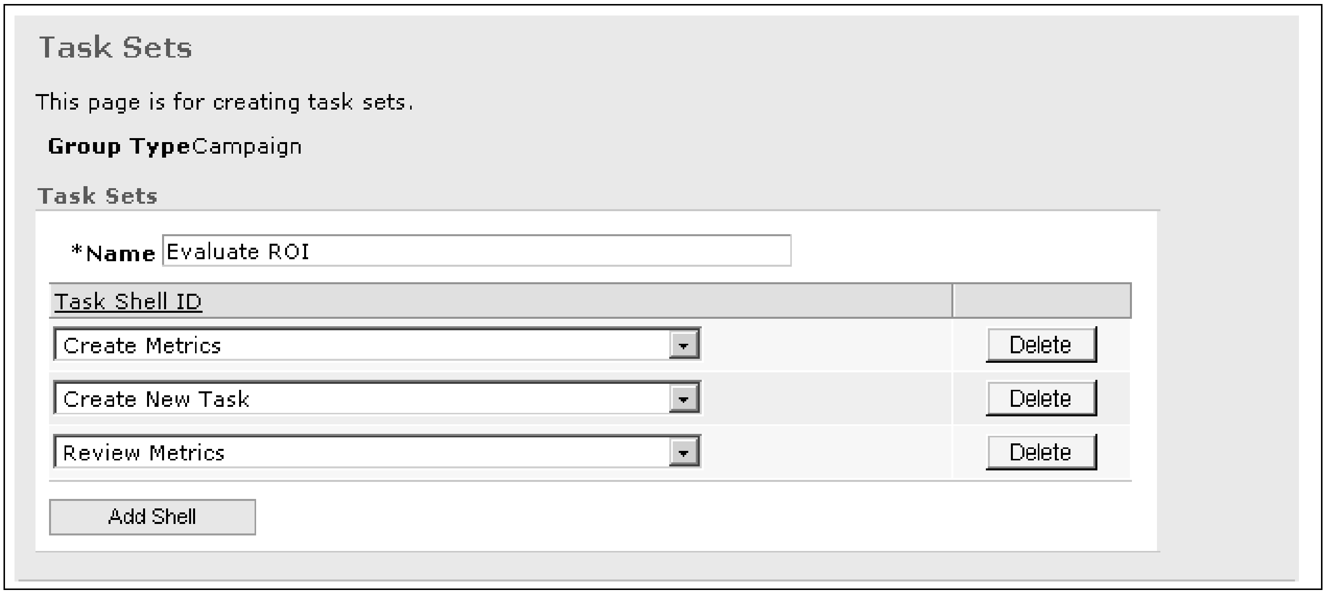
On the Task Shell Definition page, search for an existing task shell or add a new value. To add a new task shell, select a task shell type. Select *Campaign* to define a task shell associated with campaigns. Select *Content* to create a task shell associated with content. Click Add to access the Task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

| | |
|---|---|
| **Name** | Enter a name for the task. |
| **Description** | Enter a description of the task. |
| **Priority** | Select a priority value for the task. The priority value indicates the urgency of the task for information purposes only.<br>Options are: *High, Medium,* or *Low.* |

## Defining Task Sets

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

Access the Task Sets page.




Task Sets page

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

**Name** Enter a name for the task set.

**Task Shell ID** Select the name of a task shell that you want to include in the task set. Add and delete additional task shells as needed.

# Defining Telemarketing Elements

This section discusses how to:

- Define telemarketing fulfillments.
- Define telemarketing user dispositions.
- Incorporate an automatic transfer function into PeopleSoft Telemarketing scripts.

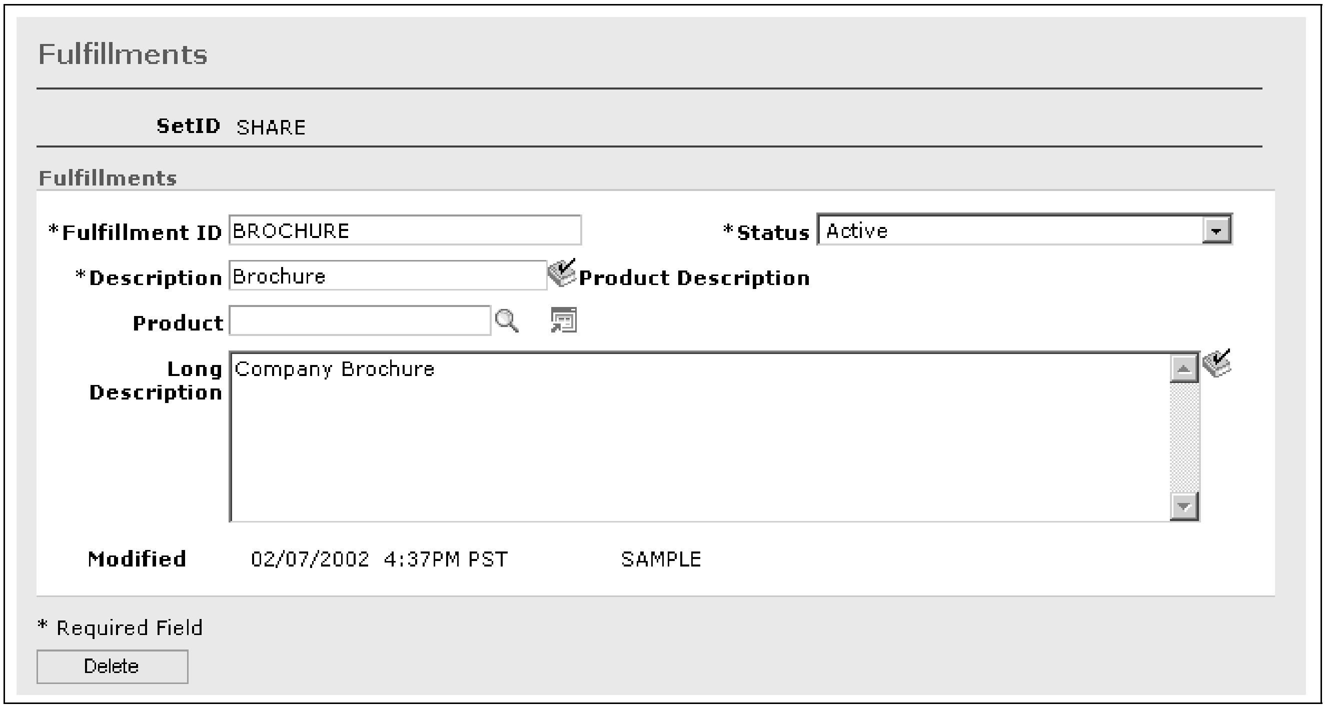
## Pages Used to Define Telemarketing Elements

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Fulfillments | RT_FULFILLMENT | Set Up CRM, Product Related, Telemarketing, Fulfillments | Define collateral materials used to fulfill telemarketing prospect requests. |
| User Dispositions | RT_USR_DISPOSTN | Set Up CRM, Product Related, Telemarketing, User Dispositions | Define why a telemarketing prospect call is closed. |

## Defining Telemarketing Fulfillments

To define telemarketing fulfillments, use the Fulfillments (RT_MGR_MANAGE_FFL) component.

Access the Fulfillments page.



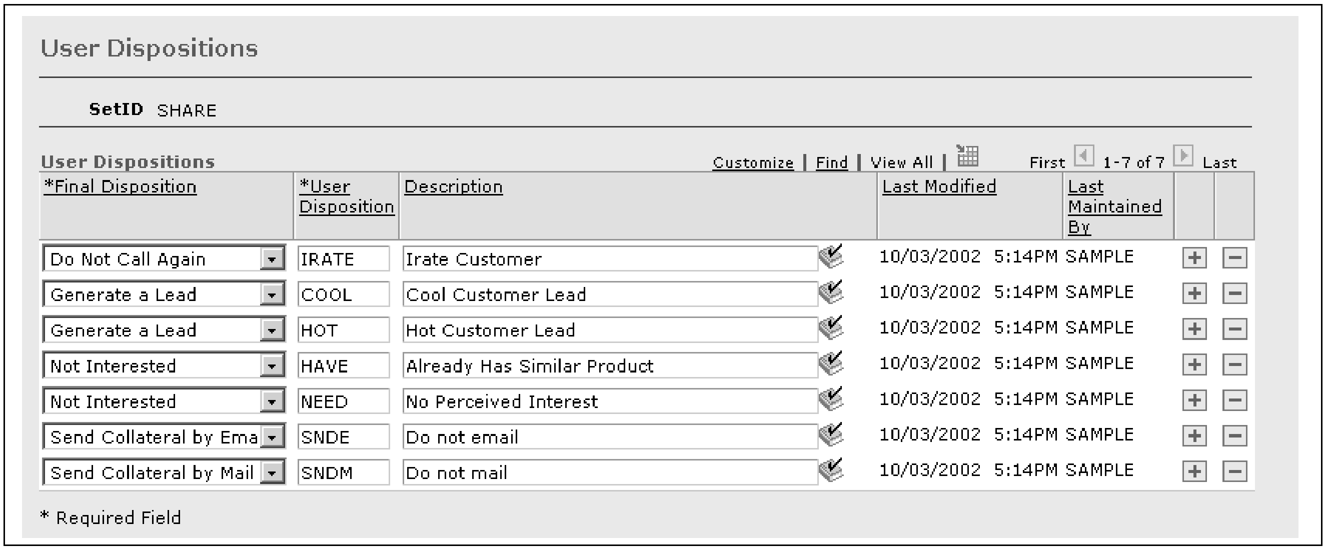

Fulfillments page

Fulfillment definitions reflect collateral materials used to support your company's products. In the course of a telemarketing call, prospects may request collateral materials related to the products offered. Call outcome selections of *Send Collateral by Mail* or *Send Collateral by Email* require that you also specify the collateral requested. When the telemarketing agent closes the call, a worklist item is sent to a fulfillment agent.

## Defining Telemarketing User Dispositions

To define telemarketing user dispositions, use the User Disposition (RT_USR_DISPOSTN) component.

Access the User Dispositions page.




User Dispositions page

User dispositions enable you to more fully explain why a telemarketing prospect call is closed. There are no delivered values and there is no associated processing.

**Final Disposition** Select a final disposition (the general reason why a prospect call is closed).

**User Disposition** Enter a user disposition code that explains the final disposition in more detail. You may enter multiple user dispositions for each final disposition.

**Description** Enter a description of the user disposition.

## Incorporating an Automatic Transfer Function Into PeopleSoft Telemarketing Scripts

PeopleSoft Telemarketing provides a PeopleCode function that automatically transfers telemarketing agents to the PeopleSoft Order Capture application when prospects reply in the affirmative to a ready to buy question. You should use this PeopleCode function, InitTelMktOrdCapture, only with scripts associated with telemarketing campaigns that allow the telemarketing agent to capture orders directly (integration method Order Capture Direct). After completing the order capture, the system returns the agent to the Telemarketing Call Prospect page and sets the Call Outcome status to *Close Sale.*

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*.

# CHAPTER 5

# Creating Campaign Content

This chapter provides an overview of campaign content and discusses how to manage content.

## Understanding Campaign Content

Campaign content is all the material that you produce to support a campaign. It includes material destined for your target audience and others outside your organization and also material to be used internally. Campaign content can take any form: radio commercials on audio cassette, glossy direct mail packets, text files, and so on.

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

Examples of campaign content include the following:

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

### Content Types and Subtypes

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

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

| Content Type | Content Subtype |
|---|---|
| Creative | Ad Creative |
| Creative | Image Suite |

| Content Type | Content Subtype |
|---|---|
| Creative | Poster |
| Deliverable | CD |
| Deliverable | Data Sheet |
| Deliverable | Executive Overview |
| Deliverable | General Overview |
| Deliverable | Success Story |
| Deliverable | Value Proposition |
| Deliverable | White Paper |
| Direct Marketing | Call Script |
| Direct Marketing | Direct Mail Piece |
| Direct Marketing | Email |
| Direct Marketing | Letter |
| Direct Marketing | Magazine Insert |
| Event | Demo |
| Event | Event Handouts |
| Event | Giveaways |
| Event | Scripted Presentation |
| Event | Signage |
| Event | Staging |

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

## Content Statuses

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

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

# Managing Content

In this section, we discuss how to:

- Define content.
- Associate collateral files with content.
- Associate tasks with content.
- Enter the costs of creating content.
- Write notes and attach them to content.

## Common Elements for This Section

**Content ID** The code that uniquely identifies the content.

**SetID** The setID in which the content resides.

## Pages Used to Manage Content

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Content | RA_CONTENT_GRD_PG | Marketing, Manage Content, Content | Search for existing, or add new content definitions. |
| Manage Content - Content Details | RA_CONTENT_DETAIL | • To add a new content definition, click the Add Content button on the Content page.<br>• To view or edit an existing content definition, use the search functionality on the Content page. Click on the Content Name to access the definition. | Define content. |
| Manage Content - Collateral | RA_CONTENT_ATCH | Marketing, Manage Content, Collateral | Associate collateral files with content. |
| Manage Content - Tasks | RA_CONTENT_TASK | Marketing, Manage Content, Tasks<br>Select a task type and click Add Task to add a task, or Add Task Set to add a task set. | Associate tasks with content. |
| Manage Content - Costs | RA_CONTENT_COST | Marketing, Manage Content, Costs | Enter the costs of creating content. |
| Manage Content - Notes | RA_CNT_NOTE | Marketing, Manage Content, Notes<br>Click Summary of Notes link on the Content - Notes page. | Write notes and attach them to content, view brief descriptions of your content notes, and access those notes. |

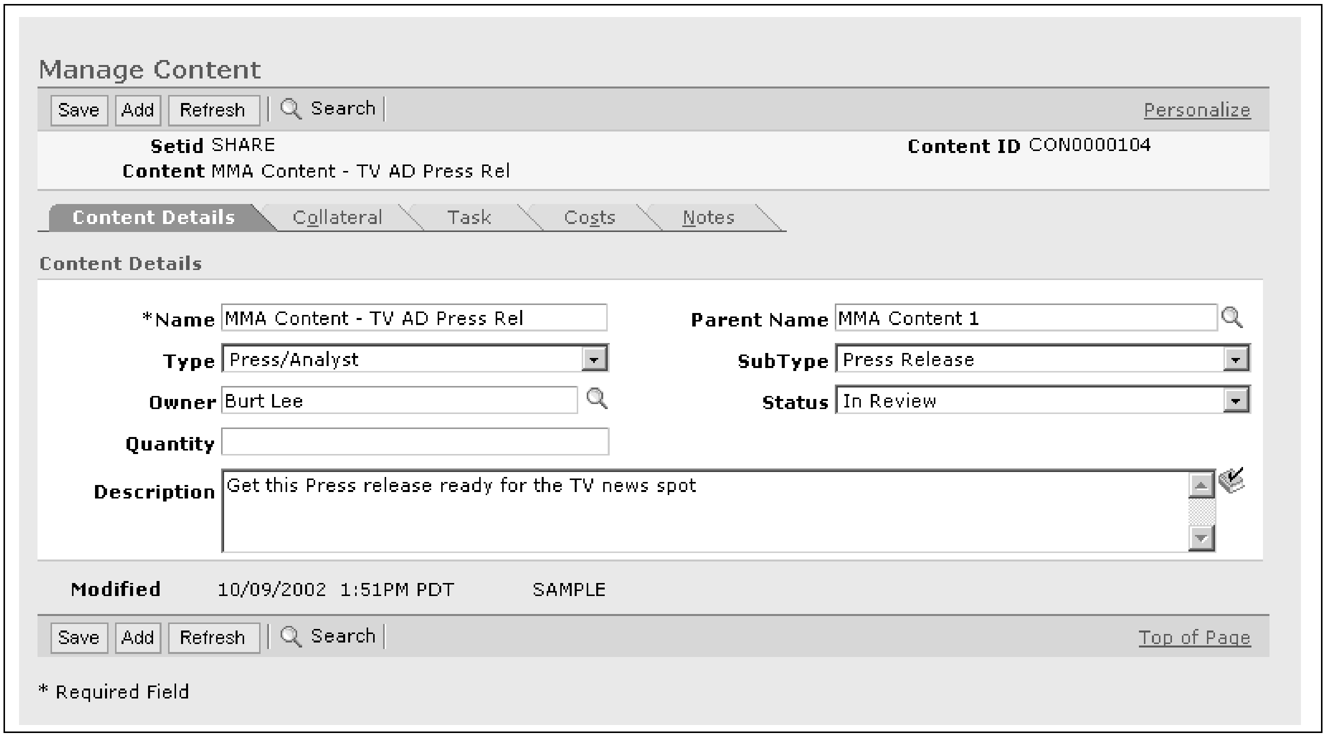
## Adding or Editing a Content Definition

Access the Manage Content page.

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

## Defining Content

Access the Manage Content - Content Details page.

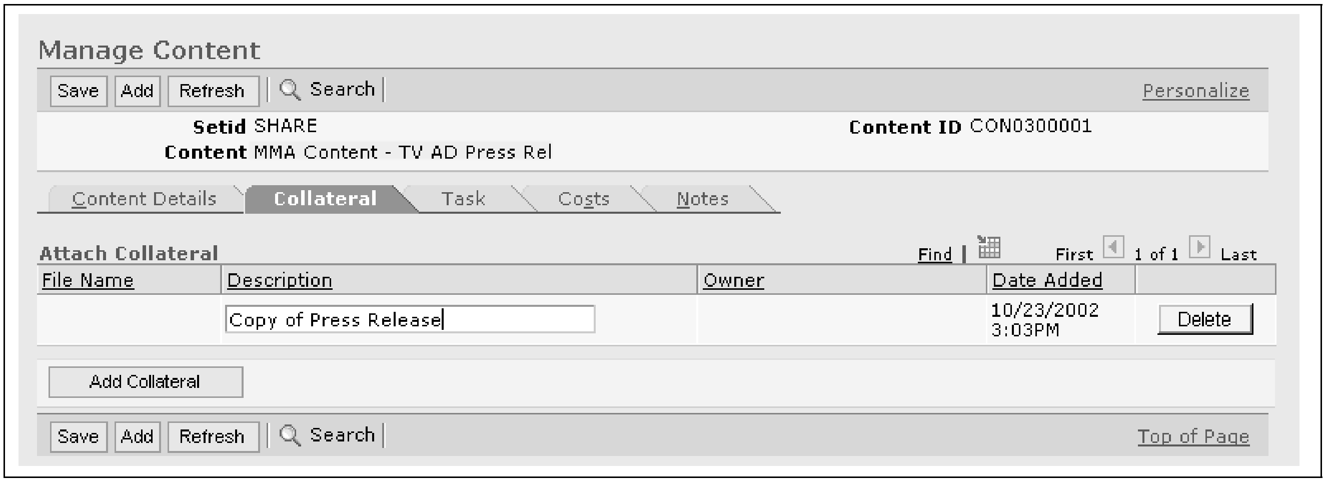



Manage Content - Content Details page

| | |
|---|---|
| **Name** | Enter a brief descriptive name for the content. |
| **Parent Name** | At times, two or more pieces of content are related to each other. For example, you might have an envelope printed to match a brochure that you're sending out. To make sure the two go together, you create a parent and child relationship. If the content has a parent, select that parent here. |
| **Description** | Enter an optional definition of the content. |
| **Type** | Select a *Content Type* from the drop down list. Content Type is defined on the Content Type setup page. |
| **SubType** | Select a *Content Sub Type* from the drop down list. Content Sub Type is defined on the Content Subtype setup page. |
| **Owner** | Select a content owner. The owner is the person responsible for the content. The content owner is the default Assigned By person for Content tasks. |
| **Status** | Identify the content's position in its life cycle. |
| **Quantity** | Enter the quantity of the content to be produced. |

## Associating Collateral Files with Content

Access the Manage Content - Collateral page.



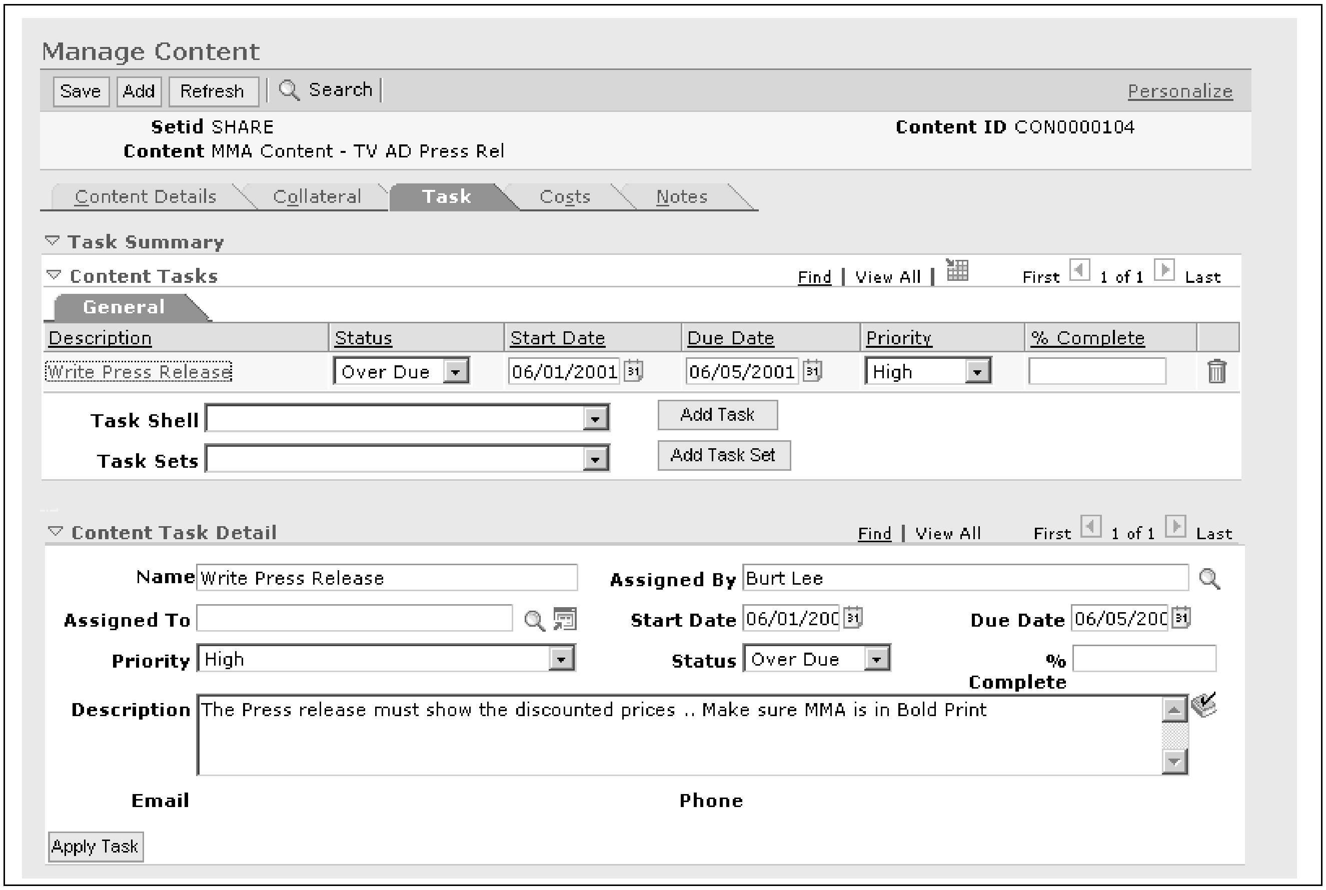

Manage Content - Collateral page

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

| | |
|---|---|
| **File Name** | Displays the name of the file attached to the content. |
| **Description** | Enter an optional description of the collateral file. |
| **Owner** | Displays the person responsible for the file attached to the content. |
| **Date Added** | Displays the date when the file was attached to the content. |
| **Add Collateral** | Click the Add Collateral button to upload collateral content. |

## Associating Tasks with Content

Access the Manage Content - Task page.



Manage Content - Task page

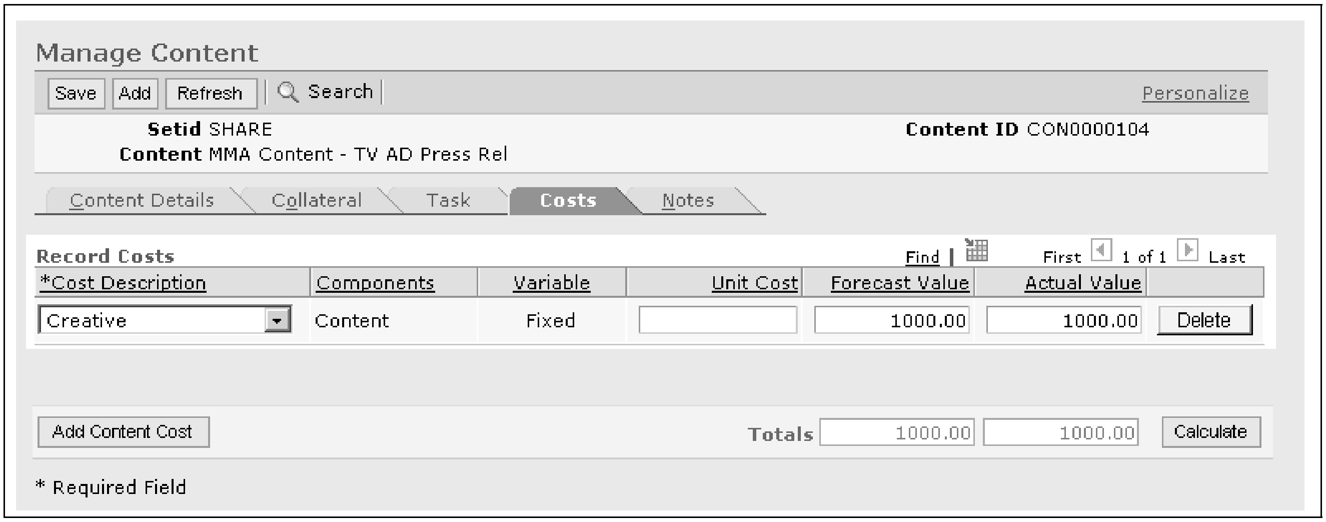
The Task page displays summary information about tasks associated with the content definition and enables you to attach new tasks and task sets.

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

See Chapter 4, “Setting Up PeopleSoft Marketing and Telemarketing,” Defining Task Tools, page 44.

## Entering the Costs of Creating Content

Access the Manage Content - Costs page.




Manage Content - Costs page

**Cost Description** Select the description of the cost you want to associate with the content. Costs are defined on the Cost setup page.

**Components** This field displays the description of the Cost Type associated with the selected Cost.

**Variable** Displays whether the content’s cost is defined as variable or fixed.

**Unit Cost** Enter the cost of a single unit of the collateral content.

**Forecast Value** Enter the expected cost of all the content. This is the number of pieces multiplied by the unit cost.

**Actual Value** Enter the actual cost of all the content. This is the final cost after adjustments are made for quantity purchased or changes in unit costs.

## View, Add, and Email Content Notes

Access the Manage Content - Notes page.

Use the Manage Content - Notes page to attach notes associated with the content definition.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

## CHAPTER 6

# Using Offers

This chapter provides an overview and discusses how to create offers.

## Understanding Offers

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

Offer details are carried through the entire transaction chain. For example, if the offer is associated with a telemarketing activity, the offer details pass to the PeopleSoft Sales application as leads are created, and to the PeopleSoft Order Capture application when sales are made. This continuity ensures that your customers receive the intended discounts or bonuses.

### Offer Statuses

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

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

# Creating Offers

In this section, we discuss how to:

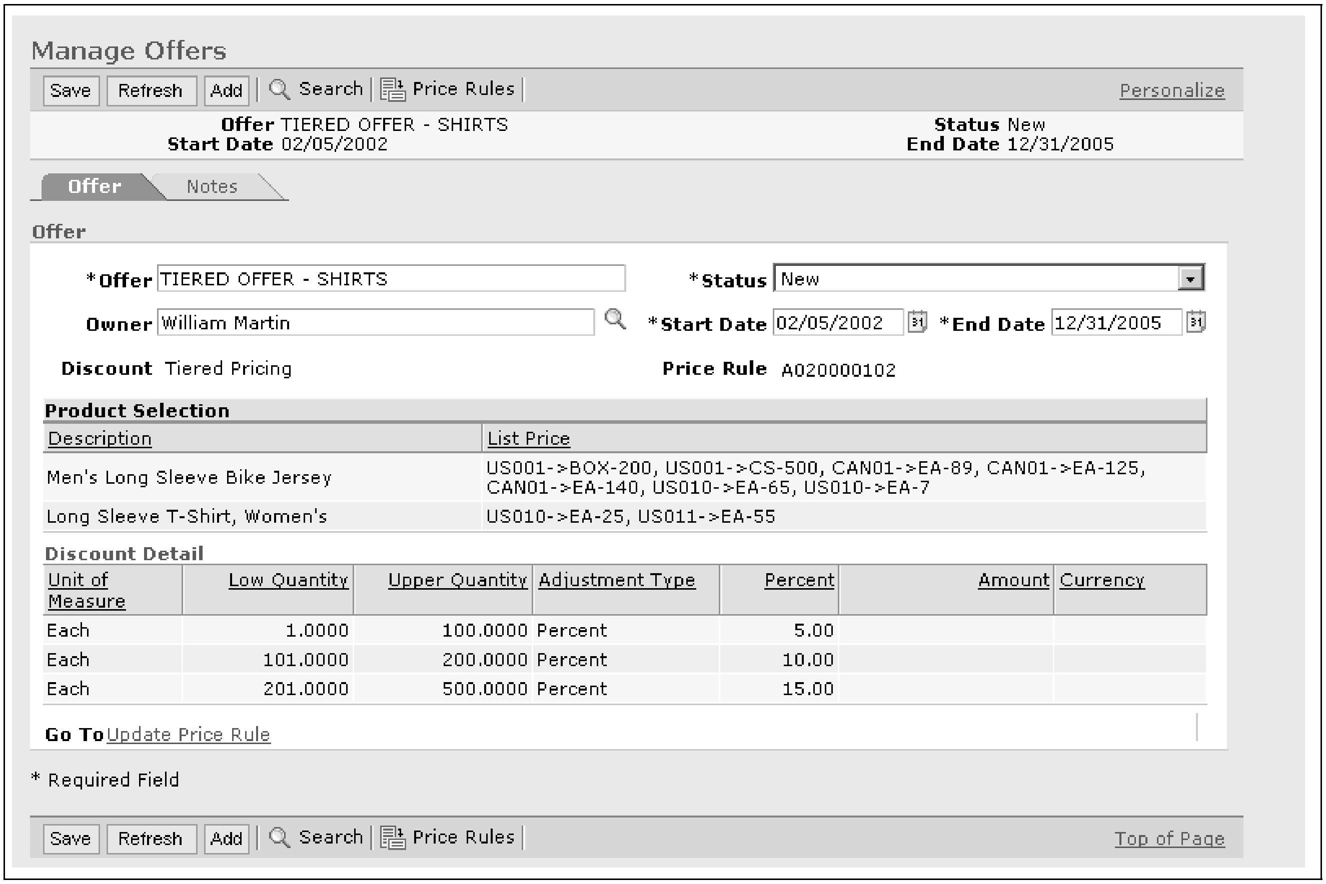
- Define a campaign offer.
- Create a PeopleSoft Marketing Price Rule.
- Attach notes to offers

## Pages Used to Create Offers

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Manage Offers | RA_OFFER_DETAIL1 | Marketing, Manage Offers, Offer | Define attributes that make up a campaign offer. |
| Create Price Rule - Select products, partners and discount | RA_PRICESET_PG | • Click the Add Price Rule link on the Offer page when creating a new offer.<br>• Click the Update Price Rule link on the Offer page when editing an existing offer. | Specify the type of discount structure that applies to the offer and the products offered. |
| Create Price Rule - Define Price Breaks | RA_PRICE_BREAK | Click the Next button on the Create Price Rule - Select products, partners and discount page. | Define the discount structure of the offer. |
| Create Price Rule - Review and Save | RA_PRICE_BREAK3 | Click the Next button on the Create Price Rule - Define Price Breaks page. | Confirm price rule selections before saving the definition. |
| Note | RA_OFFER_NOTE | Marketing, Manage Offers, Note | Write notes and attach them to offers. |

## Defining an Offer

Access the Manage Offers page.




Manage Offers page

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

| | |
|---|---|
| **Offer** | Enter a name to uniquely identify the offer. |
| **Status** | Enter the position of the offer in its life cycle |
| **Owner** | Enter or select the name of the person designated as the offer owner. |
| **Start Date** and **End Date** | Enter the start and end dates that the offer is valid. |
| **Add Price Rule** or **Update Price Rule** | Click the Add Price Rule or Update Price Rule link to access the Create Price Rule wizard. |

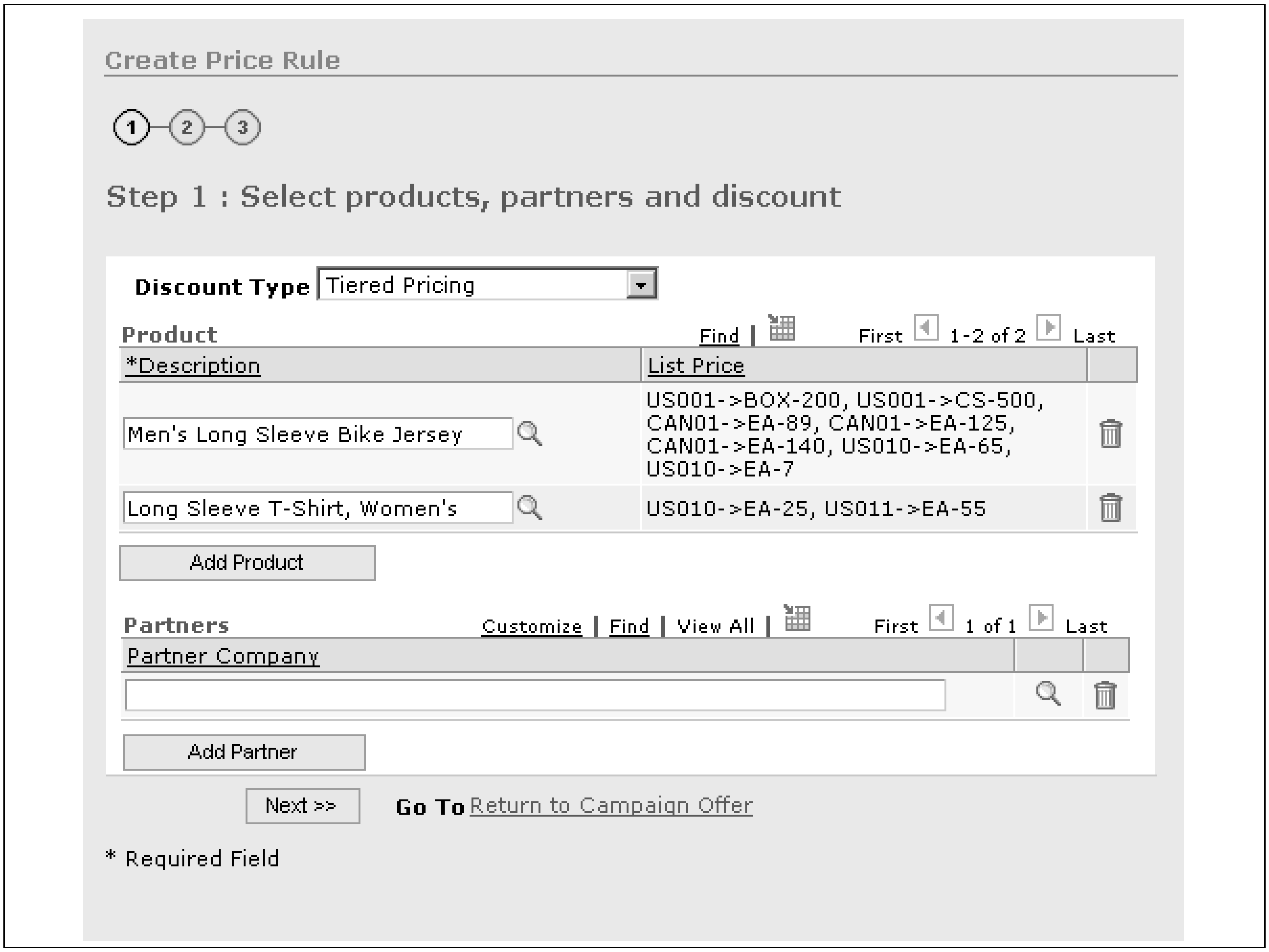
# Creating Price Rules

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

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

## Selecting Your Discount Type and Offered Products

Access the Create Price Rule - Select products, partners and discount page.




Create Price Rule - Select products, partners and discount page

**Discount Type**

Select the discount type that you want to associate with the offer. Marketing Discount Type options are:

*Giveaway:* Giveaway discounts take the form of in-kind giveaways, rather than cash breaks. That is, when a customer receives a giveaway discount, you give that customer some free product or a service and charge full price for the actual purchase.

*Standard Discount:* Standard discounts are flat discounts. Customers who purchase qualified amounts receive the same discount regardless of how many units of a product of service they buy.

*Tiered Pricing:* Tiered discounts vary based on the number of units of a product or service purchased. For example, you might give a five percent discount when a customer buys one to nine units, ten percent discount if they buy ten to twenty-four, and a fifteen percent discount if they buy twenty-five or more.

---

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

---

**Product ID**
Select the ID of the offered product.

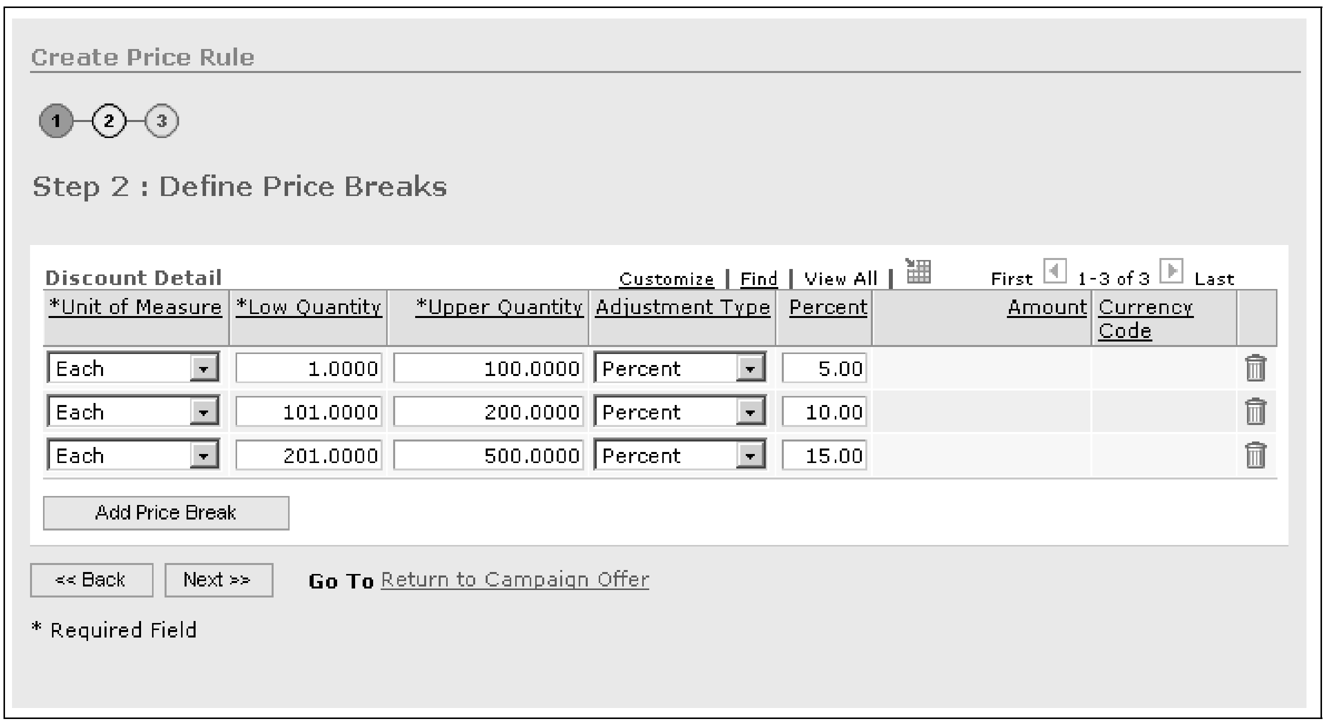
**Description**
Displays the description of the selected product.

**List Price**
Displays the Inventory Business Unit and List Price of the selected product. You establish list prices using the Products Price page of the Price component under the Products CRM menu.

**Partner Company**
(*Optional*) Select the name of a partner company if you want to create a Price Rule keyed by Partner ID.

## Defining Quantity Breaks and Price Adjustments

Access the Create Price Rule - Define Price Breaks page.




Create Price Rule - Define Price Breaks page

The discount type that you select in Step 1 determines the fields needed for Step 2. The following fields apply to all discount types.

**Unit of Measure**
Select the unit of measure you want to use for the offered product.

**Low Quantity**
Enter the minimum quantity of product to qualify for the promotional discount.

**Upper Quantity**
Enter the maximum quantity of product to qualify for the promotional discount.

**Note.** Enter a maximum quantity high enough that no order will exceed it.

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

**Adjustment Type** Select the type of discount that you want to apply to the product price. Type options are:

*Amount:* Select the amount option to deduct a fixed currency amount from the final product price.

*Percent:* Select the percent option to calculate and deduct a percent amount from the final product price.

**Percent** Enter a percent amount that you want deducted from the final product price when you select a Percent type.

**Amount** Enter the currency amount that you want deducted from the final product price when you select an Amount type.

**Currency Code** Select the currency code appropriate to your market when you select an Amount type. A currency code selection does not apply to the Percent type.

The following fields apply only to Giveaway discount types.

**Description** Select the Promotional Product ID number of the product you are giving away as the promotional item.

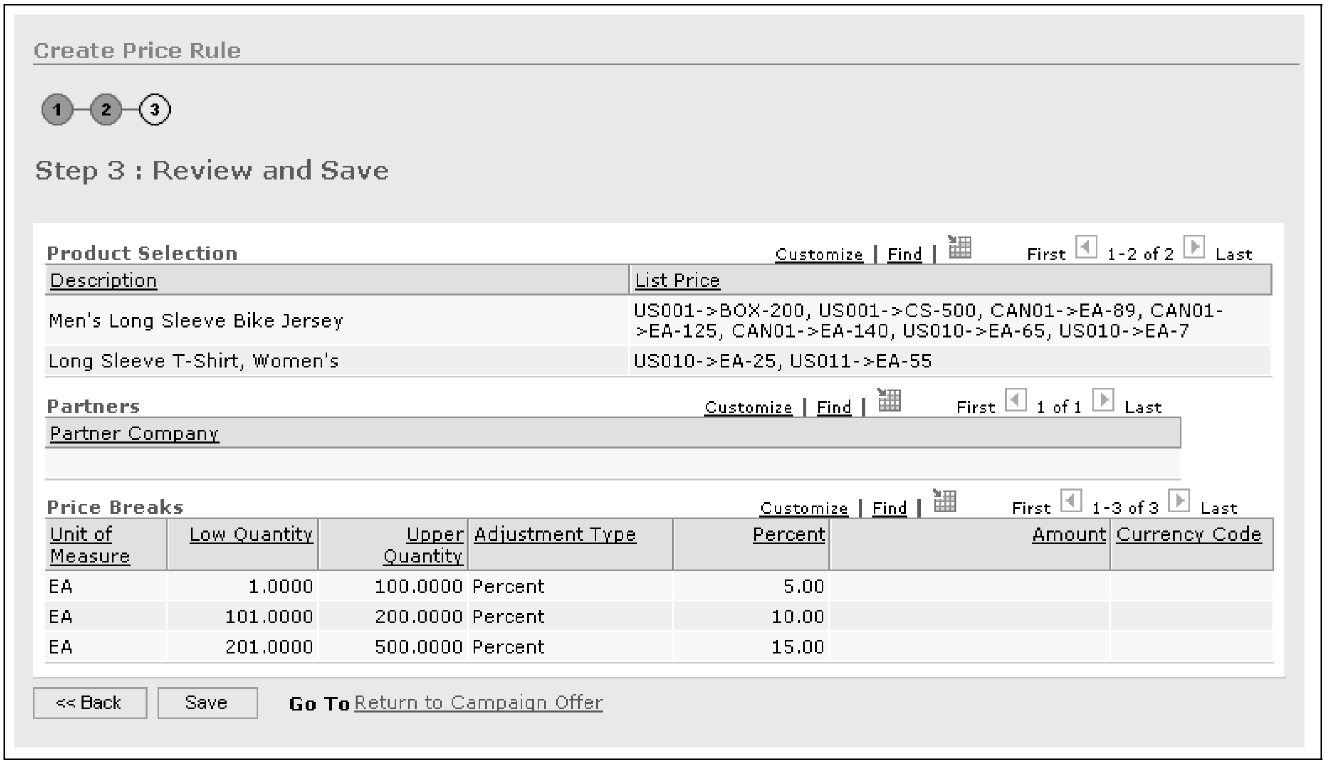
**Unit of Measure (Promotion)** Select the unit of measure used for the promotional product.

**Quantity** Enter the quantity of promotional products to be given with the amount of product purchase. The Quantity amount corresponds to the Unit of Measure (promo prod) selection.

For example, if you want to give one box of T-shirts with the purchase of ten or more cases of fishing line, select *Box* as the Unit of Measure (promo prod) and *1* as the Quantity.

## Reviewing and Saving Your Price Rule Definition

Access the Create Price Rule - Review and Save page.



Create Price Rule - Review and Save page

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

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

### See Also

Chapter 6, "Using Offers," Creating Price Rules, page 61

## Attaching Notes to Offers

Access the Offers - Note page.

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

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Working with Notes and Attachments".

CHAPTER 7

# Using Audiences

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

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

This chapter provides an overview of audiences and discusses how to:

- Create and manage audiences.
- Export audiences for use outside the PeopleSoft CRM application suite.

## Understanding Audiences

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

Before you define an audience, consider the following questions:

- Are the intended recipients all known to you? That is, are they already in your PeopleSoft CRM database (an internal audience), or are they unknown to you and will be contacted by an outside vendor (an external audience)?
- How will the recipients be contacted? For example, do you plan to contact them using PeopleSoft Telemarketing, Online Marketing, or Sales applications, or will you use a third-party direct mail vendor?
- Do you want the audience to reflect changes to the database each time it is generated (a dynamic audience), or will it remain the same (a fixed audience)?
- Will the audience be used to test your campaign before you go live or will you try different strategies (a test audience)?

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

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**Note.** Because audiences can be used with multiple campaigns, it is important that you be careful when making changes to an existing audience so that you don’t adversely affect another campaign. For this reason, PeopleSoft Marketing provides the ability to clone audiences.

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This section discusses:

- Segments

- Audience statuses
- Audience sources
- Audience Types

## Segments

A segment is a group of customers defined by some selection criteria. Segments are considered a type of audience—their selection criteria are defined in the same way as for audiences, and they can be used interchangeably in PeopleSoft Marketing, Online Marketing, and the enterprise with dynamic audiences.

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

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

## Audience Statuses

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

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

---

an audience can pass through the following statuses:

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

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

## Audience Sources

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

External audiences are unknown contacts that do not exist in your database. Two common examples of an external audience are a mailing produced by a third party vendor from their own audience list, and respondents to a website banner ad. In neither case is the audience drawn from your PeopleSoft CRM database.

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

There are four sources of audiences:

| Audience Source | Description |
|---|---|
| *External* | An *External* audience is made up of contacts previously unknown to your PeopleSoft Marketing system. For example, placing a banner ad on a website exposes your offer to an audience, but you have no idea who will see it and respond. |
| *Internal Using Audience Builder* | The audience is generated from contacts currently in the PeopleSoft Marketing database. Audience Builder enables users who do not know SQL to define a simplified selection query. |
| *Internal Using Combine Audiences* | Two or more existing audiences are combined into a new, larger audience. All existing audiences included in a combined audience definition must be drawn from contacts currently in the PeopleSoft Marketing system. |
| *Internal Using Import* | A contact list is imported into your PeopleSoft CRM database from which you generate an internal (known) audience. |
| *Internal Using PSQuery* | Uses PSQuery functionality to create an audience from contacts currently in the PeopleSoft Marketing system. Using PSQuery requires a knowledge of SQL. |

| Audience Source | Description |
|---|---|
| *Internal Using Saved Search* | Based on the search criteria entered on a Configurable Search page. The Configurable Search page must have been configured to be enabled for audience creation. An enabled search page will give you the option of saving the search as an audience.<br><br>**Note.** This option doesn't appear when you are creating a new audience. You can view or update this audience type on the Audience Detail page, but not create it. |
| *Control Group* | Control groups help you gauge the effectiveness of your campaign by isolating a small segment of your target audience. By comparing sales results of the larger audience to those of the control group, you can determine the actual influence of your campaign. How control group members are drawn from each included audience is controlled by a combination of the control group audience size and source audience percentages.<br><br>**Note.** This option doesn't appear when you are creating a new audience. You can view or update this audience type on the Audience Detail page, but not create it. |
| *Test Audience* | A test audience is created by selecting a subset of a generated audience. Use test audiences to try different offers on different subsets of your audience. These test audiences can be created as a percentage of the original audience count, or users can specify the total number of records for each test audience. Test audience selection is random. All test audiences are fixed audiences.<br><br>**Note.** You can only create test audiences for audiences in the status of Generated, Approved, or Committed. |
| *Segment* | A segment is similar to an audience built using Audience Builder. Segments can be created in a hierarchical structure in which a child segment automatically inherits the roles and selection criteria of its parent segment. |

### See Also

*Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query*

## Audience Types

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

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

**Note.** Segments are always dynamic.

| Audience Type | Description |
|---|---|
| *Fixed* | Results are static once an audience is generated. The audience query is run only at the time the audience is created. New contacts meeting the audience criteria are not added to the generated list unless the audience is manually regenerated or cloned and newly generated. |
| *Dynamic* | Audience query criteria is stored and run each time an action associated with the audience executes. Each time the audience is used, new contacts that meet the criteria will be included in the results, and old contacts that no longer meet the criteria will not be included in the results. |

# Creating and Managing Audiences

In this section, we discuss how to:

- Define and update audiences and segments.
- Associate audiences with campaign activities.
- Associate costs with an audience.
- View and add notes related to an audience.
- Remove records from a generated audience.
- Managing audience correspondence.

## Common Elements Used in This Section

**Count** Displays number of records (people) in the audience.

**Note.** The count for dynamic audiences and segments represents the number of records in the audience at the time it was last generated. The audience count is not updated when it is used as part of a PeopleSoft Online Marketing Dialog. For example, at the time of approval a dynamic audience might contain 500 records. Two weeks later when the audience is used by PeopleSoft Online Marketing, the audience might grow to 550 records.

**Owner** Person who is responsible for an audience.

**Status** Position of an audience in its life cycle. Values are: *Approved, Archived, Committed, Designed, Generated, In Design, Processing,* and *Scheduled*.

## Pages Used to Create and Manage Audiences

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Audiences | RA_LIST_SUMMARY | Marketing, Manage Audiences | View summary information about all existing audiences or add a new audience. |
| Audience Details | RA_LIST_MAIN | • Click on an audience name on the Audiences page to open an existing audience.<br>• Click the Create New Audience button on the Audiences page to define a new audience. | Define and update audiences. |
| Segment Detail | RA_LIST_SEG_MAIN | Click on a segment name on the Audiences page to open an existing segment.<br>Click the Create a New Segment button on the Audiences page to define a new segment. | Define and update segments. |
| Define Segment Group | RA_SEGMENT_GROUP | Set Up CRM, Product Related, Marketing, Audiences, Segment Groups<br>or<br>Click the Add New Segment Group button on the Segment Details page. | Use to define segment groups, which are used to group segments and segment hierarchies. |
| Create a Target Audience - Select Roles | RA_LB_STEP_1 | Click the Edit with Audience Builder link on the Audience Details page. | Select basic profiles to include in audience selection. |
| Create a Target Audience - Define Selection Criteria | RA_LB_STEP_2 | Click the Next Step button on the Create a Target Audience - Select Roles page. | Select profile fields and values to define audience selection criteria. |
| Create a Target Audience - Review and Save | RA_LB_STEP_3 | Click the Next Step button on the Create a Target Audience - Define Selection Criteria page. | Confirm contents of the audience selection criteria. |
| Activities | RA_LIST_WAVES | Marketing, Audiences, Activities | View activities associated with audiences. |
| Plans | RA_LIST_PLANS | Marketing, Audiences/Segments, Plans | Define plans for audiences and segments. This page is only visible if the audience or segment has been published. |
| Costs | RA_LIST_COST | Marketing, Audiences, Costs | Associate costs with audiences. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Notes | RA_LIST_NOTE | Marketing, Audiences, Notes | View brief descriptions of your audience notes and access those notes. |
| Result List | RA_LIST_RECS | Marketing, Audiences, Audience Result List | View or eliminate records from a generated audience. |
| Audiences - Correspondence | RA_LIST_CM | Marketing, Audiences, Correspondence | View summary information about audience correspondence and initiate new correspondence. |
| Team | RA_LIST_TEAM | Marketing, Manage Audiences, Team | Associate team members to an audience. You can associate individual workers or entire roles as team members—in the case of roles, each individual worker who has that role will be considered a team member. Team membership can be used to control or limit who can access this audience or segment. |
| Create Test Audiences | RA_TEST_AUDIENCE | Click the Create Test Audience button on the Audience Detail page. | Create one or more test audiences for an audience in Generated, Approved, or Committed status. |

## Creating and Updating Audiences

Access the Audiences page.

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

Audiences are created using profiles. For a complete explanation of profiles:

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

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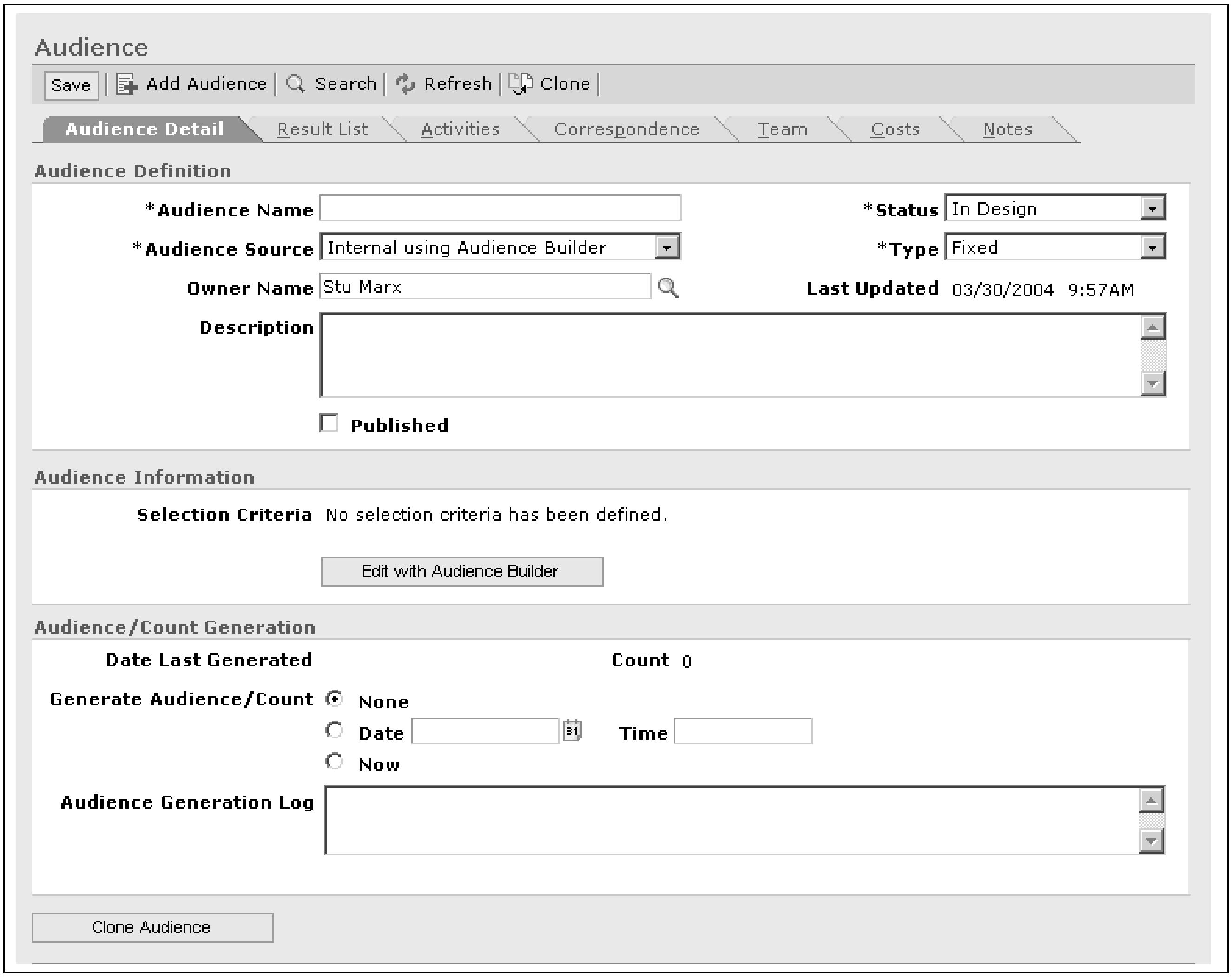
See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook.*

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook.*

### Creating an Audience

Access the Audience Details page.




Audience Details page

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

## Audience Details Page Header

**Audience Name** Enter a descriptive name for the audience. This field is display-only once the audience is saved.

**Source** Source values indicate from where an audience is drawn and how it was selected. Values are: *Control Group*, *External*, *Internal Using Audience Builder*, *Internal Using Combine Audiences*, *Internal Using Import*, *Internal Using PSQuery*, *Test Audience*, *and Internal Using Saved Search*.

**Note.** You cannot change the source type of an audience once you have created it.

**Note.** The values, *Control Group, Test Audience, and Internal Using Saved Search* are not available when you define a new audience. These types of audience are created through other means, but you can view or update once it is created.

**Published** — Select this check box to indicate that you want the audience or segment to be visible and available to users outside the CRM Marketing application, such as the AAF Library or the Strategic Account Planning application.

## Audience/Count Generation

**Date Last Generated** — Date and time when the audience was last generated successfully.

**Generate Audience/Count** — Select when you want the audience to generate.

**None** — Select if you are creating an audience definition to use at an unknown future date and you do not wish to generate it at this time.

**Date** and **Time** — Select to specify a date and time for the audience to generate.

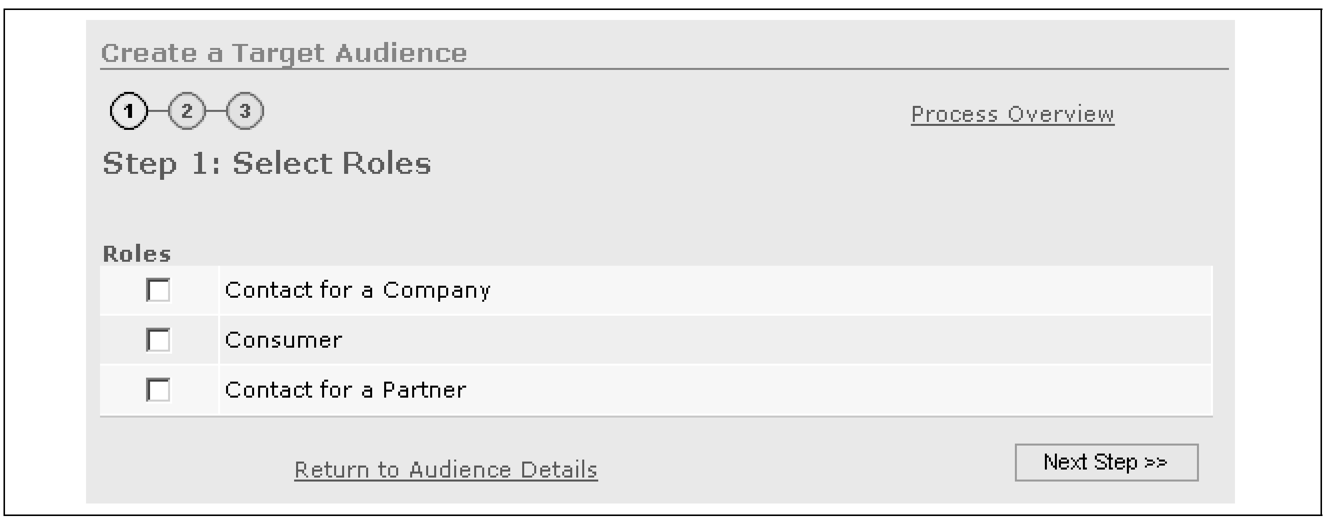
**Now** — Select to generate the audience as soon as you save the changes.

**Log** — The Log field displays information about generated audiences. For each effort to generate an audience, the log includes the date and time, the outcome of the effort, and the number of records (people) placed on the audience.

## Generating an Audience Using Audience Builder

Access the Create a Target Audience - Select Roles page.

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




Create a Target Audience - Select Roles page

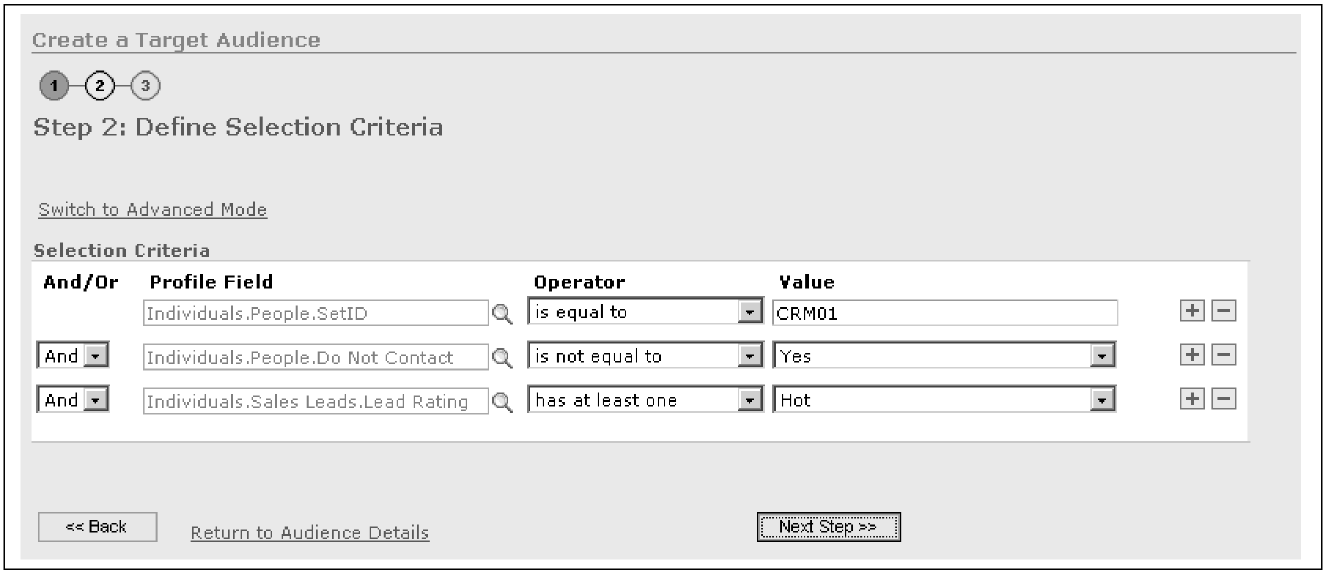
Audience Builder enables users with no knowledge of SQL to create simplified yet powerful selection queries. Use the three-step Audience Builder Wizard to define the selection criteria and generate the audience.

**Roles** — A person is represented in the PeopleSoft CRM CDM (Customer Data Model) as a *Contact for a Company* (a representative of a company), or a *Consumer,* or a *Contact for a Partner* (a representative of a partner). It is possible for someone to appear as both, or even appear as a contact multiple times, if they represent more than one company. You must select at least one option, but may select more than one to include all eligible records.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*.

### Create a Target Audience - Define Selection Criteria Page

Access the Create a Target Audience - Define Selection Criteria page.




Create a Target Audience - Define Selection Criteria page

Filter the final results of your audience by defining selection criteria. Audience Builder offers both a Basic and Advanced Mode.

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

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

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

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

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

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

**Profile Field**

Select the profile fields that contain the data you will use for your selection criteria. Fields from any activated profile that falls under the role or roles selected, are available. Refer to the Profiles chapter for more information about how profiles are defined.

You can add additional fields to further narrow your selection criteria.

**Operator**

Specify the criteria operator.

**Value**

Enter the criteria value. If a prompt table is associated with the profile field, the Value field will contain a Lookup. Otherwise, free form text can be entered. For audiences, the Lookup will contain only approved or committed internal published audiences. For segments, it will contain approved or committed published segments.

**And/Or**

Select an operator to connect condition clauses.

Condition clauses linked by the *And* connector will only return a selection when *all* linked conditions are met.

Condition clauses linked by the *Or* connector will return a selection when *any* of the linked conditions are met.

---

**Note.** A *With* connector is available for use in Advanced Mode with a Many Row profile types.

---

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

| ***Available Operator*** | ***Profile Type*** | ***What is Included*** |
|---|---|---|
| is empty | One Row | Includes any record where there is no data in the selected field. |
| is not empty | One Row | Includes any record where there is data in the selected field. |
| is equal to | One Row | Includes any record where the data in the selected field is equal to the specified value. |
| is not equal to | One Row | Includes any record where the data in the selected field is not equal to the specified value. |
| is less than | One Row | Includes any record where the data in the selected field is less than the specified value. |
| is no more than | One Row | Includes any record where the data in the selected field is less than, or equal to, the specified value. |
| is at least | One Row | Includes any record where the data in the selected field is equal to, or greater than, the specified value. |
| is more than | One Row | Includes any record where the data in the selected field is greater than the specified value. |
| contains | One Row | Includes any record where the character or string data in the selected field contains the specified character or string value.<br><br>**Note.** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.<br><br>**Note.** This operator is only available in Advanced Mode. |
| not contains | One Row | Includes any record where the character or string data in the selected field does not contain the specified character or string value.<br><br>**Note.** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.<br><br>**Note.** This operator is only available in Advanced Mode. |

| *Available Operator* | *Profile Type* | *What is Included* |
|---|---|---|
| starts with | One Row | Includes any record where the character or string data in the selected field starts with the specified character or string value. For example, to select all records where the contact's last name begins with "A", specify the value "A."<br><br>**Note.** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user. |
| not starts with | One Row | Includes any record where the character or string data in the selected field does not start with the specified character or string value. For example, to include all records except those where the contact's last name begins with "A", specify the value "A".<br><br>**Note.** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user. |
| ends with | One Row | Includes any record where the character or string data in the selected field ends with the specified character or string value.<br><br>**Note.** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.<br><br>**Note.** This operator is only available in Advanced Mode. |
| not ends with | One Row | Includes any record where the character or string data in the selected field does not end with the specified character or string value.<br><br>**Note.** Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.<br><br>**Note.** This operator is only available in Advanced Mode. |
| has at least one | One Row w/Choose Many attribute, Many Row | Includes any individual having at least one associated record where the data in the selected field is equal to the specified value. |
| has all | One Row w/Choose Many attribute | Includes any record where the data in the selected field includes all values specified. If any specified values are missing, the record will not be included. |

| ***Available Operator*** | ***Profile Type*** | ***What is Included*** |
|---|---|---|
| does not have all | One Row w/Choose Many attribute | Includes any individual not having at least one associated record for each specified value where the data in the selected field is equal to the specified value. |
| has none | One Row w/Choose Many attribute, Many Row | Includes any individual having no associated records where the data in the selected field is equal to the specified value. |
| has only | Many Row | Includes any individual having only associated records where the data in the selected field is equal to the specified value. |
| has other than | Many Row | Includes any individual having at least one associated record where the data in the selected field is not equal to the specified value. |
| has only empty | Many Row | Includes any individual having only associated records where no data is contained in the selected field. |
| has none empty | Many Row | Includes any individual having only associated records where data is contained in the selected field. |
| has at least one empty | Many Row | Includes any individual having at least one associated record where no data is contained in the selected field. |
| has other than empty | Many Row | Includes any individual having at least one associated record where data is contained in the selected field. |
| has all less than | Many Row | Includes any individual having only associated records where the data in the selected field is less than the specified value. |
| has all more than | Many Row | Includes any individual having only associated records where the data in the selected field is more than the specified value. |
| has none less than | Many Row | Includes any individual having no associated records where the data in the selected field is less than the specified value. |
| has none more than | Many Row | Includes any individual having no associated records where the data in the selected field is more than the specified value. |

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

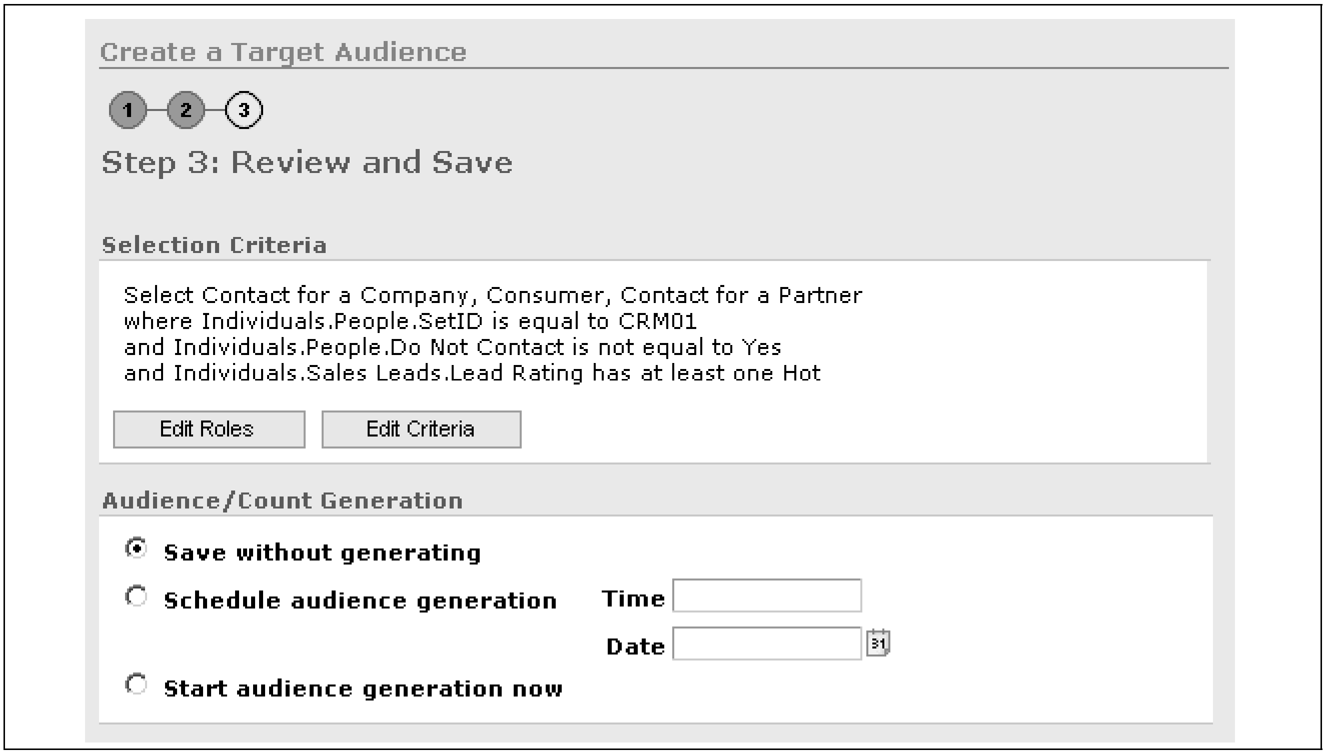
| Available Operator | Profile Type | What is Included |
|---|---|---|
| has any prior curr. date (has any prior current date) | Many Row | Includes any individual having at least one associated record where the data in the selected field is prior to the current date on the day that the query is run.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

***Warning!*** When creating audiences for telemarketing, ensure that all telemarketing prospects have a telephone number by including it as part of your audience selection criteria.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

### Create a Target Audience - Review and Save Page

Access the Create a Target Audience - Review and Save page.




Create a Target Audience - Review and Save page

### Selection Criteria

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

### Audience/Count Generation

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

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

### Generating an Internal Audience Using Combined Audiences

The system displays the Source Audiences region only when you select the source, *Internal Using Combined Audiences.* Combined audiences are created by combining two or more existing audiences.

**Audience Name** Select an existing audience to include in the new audience. Add all additional audiences required to make up the combined audience.

### Importing an Audience

Creating an imported audience involves defining an audience shell within PeopleSoft Marketing, then importing audience data into the CDM using the CDM Data Import process. The CDM Data Import process populates the audience table. Once an audience is actually created, you can attach it to an activity, select records, deduplicate, or anything else that you can do with any other audience.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Importing Data Into PeopleSoft Enterprise CRM".

### Generating an Audience Using PeopleSoft Query

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

To be used for audience generation, a query must:

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

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

---

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

---

**Query Name** Select the query created using PeopleSoft Query Manager.

**Modified Query SQL** The SQL code is copied from the selected query, modified slightly by the system (some additional criteria is added to insure that only contacts and individual consumers are returned in the results) and displayed here. The copied code is saved with the audience and is used in the audience generation process. If the underlying PSQuery is changed, you must update the saved SQL code for the changes to take effect.

---

**Note.** You cannot change the displayed code. It is read-only.

---

**Query Manager** Click to access the PeopleSoft Query Manger.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query*

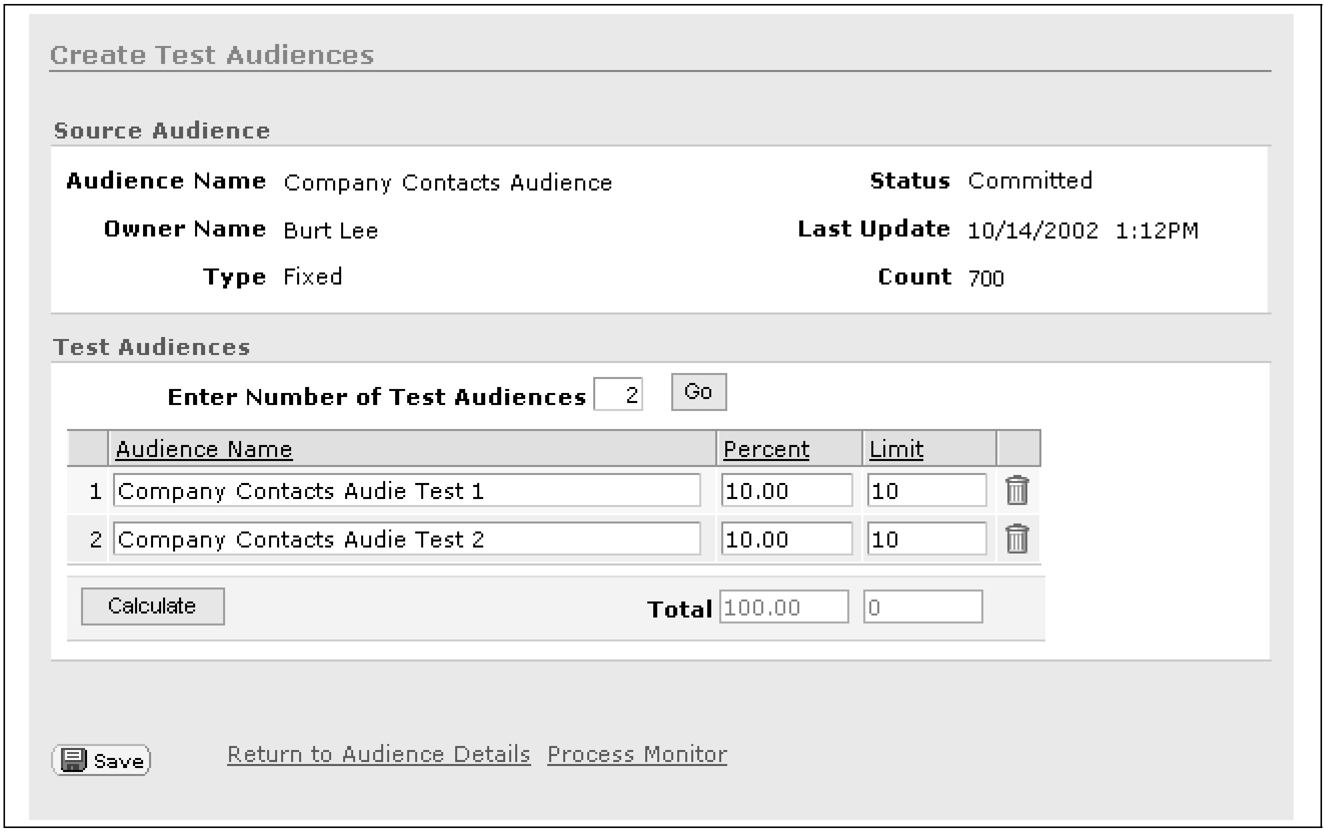
### Cloning an Audience

**Clone Audience** Click to create a duplicate of an existing audience. You can also launch the process using the Clone Audience button on the tool bar.

The cloned audience inherits the selection criteria of the original audience. The status of the cloned audience is automatically set to *In Design,* regardless of the status of the source audience. The cloned audience must pass through the regular status stages including generation.

## Creating Test Audiences

Click the Create Test Audiences button to access the Create Test Audiences page.




Create Test Audiences page

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

---

**Note.** The Create Test Audiences button is only available when an audience is in the status of Generated, Approved, or Committed.

---

**Enter Number of Test Audiences**

Enter the number of test audiences into which you want to divide your original audience. Click Go to divide the original audience.

**Audience Name**

Accept the name created by the system, or rename the test audience.

**Percent**

This field indicates the percent of the original audience that each test audience makes up. The system initially divides the original audience into equal (or approximately equal) percentages, but you can adjust the percentages as desired. The total does not have to equal 100 as only the test audiences are included in the total.

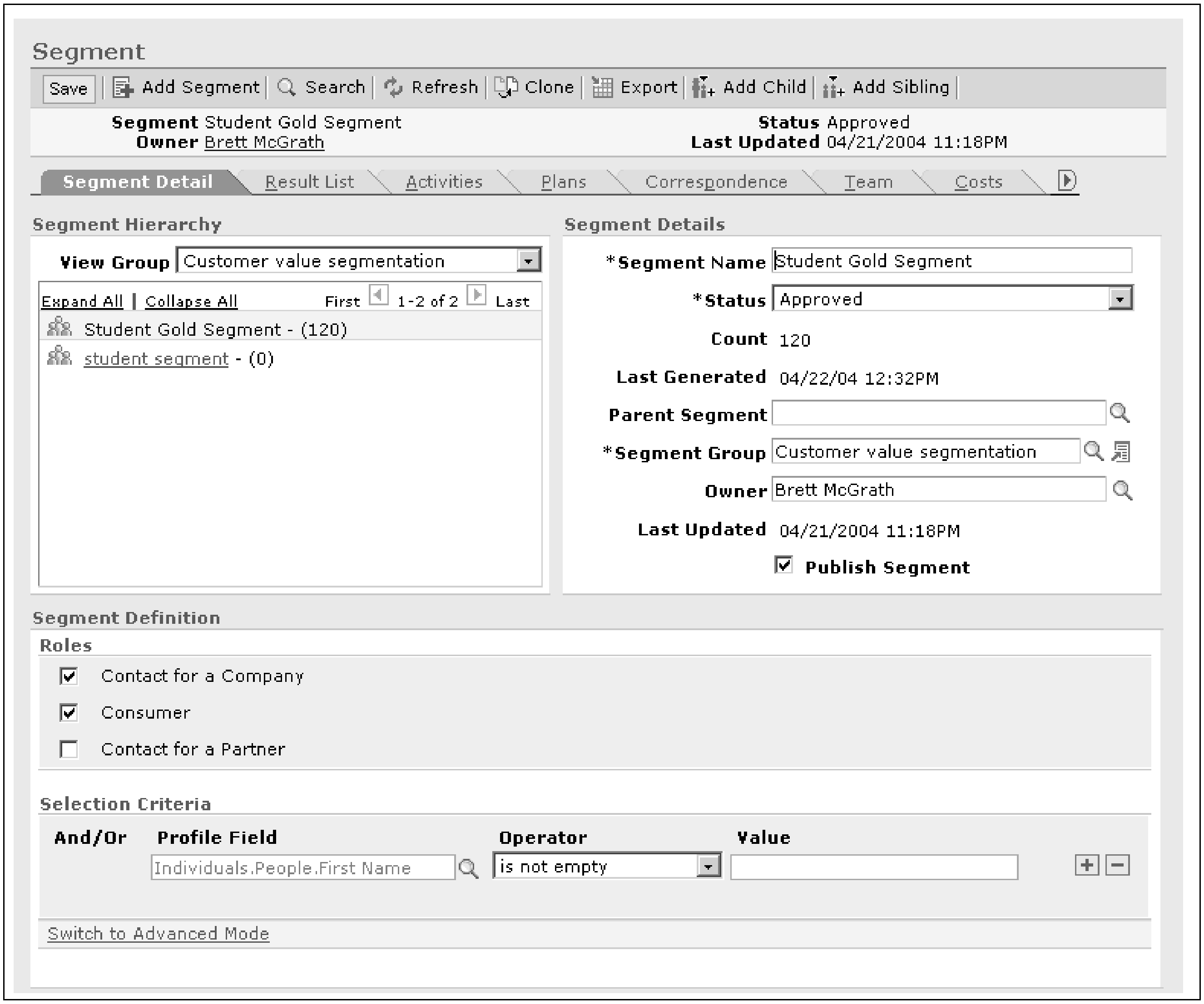
**Limit**

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

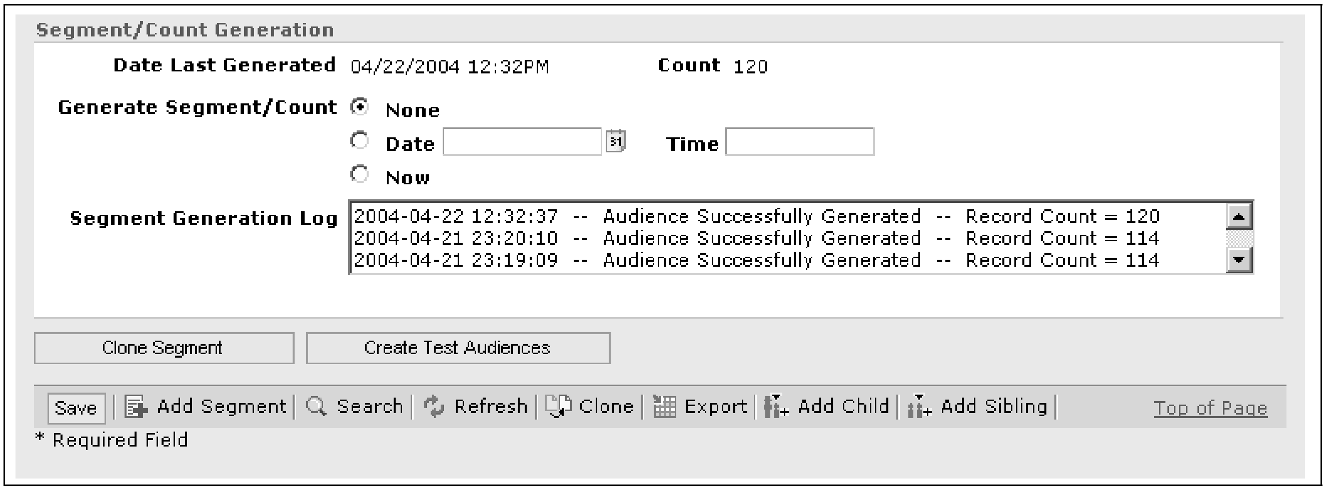
## Creating and Updating Segments

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

Access the Segment Detail page.




Segment Detail page (1 of 2)




Segment Detail page (2 of 2)

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

## Segment Hierarchy

Segment hierarchies are created by defining parent-child relationships between segments. A segment can have multiple children, but only one parent. Child segments always inherit the selection criteria of their parents, and by default inherit its parent's Owner attribute.

**View Group**

Select a segment group from the available options to view that group's hierarchical information.

Selecting a segment group refreshes the page and displays the segments that are part of the selected group, so you will be prompted to save any changes to the segment.

## Segment Details

**Segment Name**

Enter a descriptive name for the segment.

**Status**

Select the segment's current status from the available options.

**Parent Segment**

If the segment is to be the child of an existing segment, select the segment name from the lookup. If the segment is not the child of another segment, leave this field blank.

**Segment Group**

Click the lookup button to select an existing segment group, or click the Add New Segment Group button to define a new one. Every segment must belong to a segment group.

**Publish Segment**

Select this check box if you want to make this segment available to the enterprise outside of PeopleSoft Marketing.

**Note.** A child segment can only be published if its parent segment is published.

### Segment Definition

**Roles**

A person is represented in the PeopleSoft CRM CDM (Customer Data Model) as a *Contact for a Company*(a representative of a company), a *Consumer,* or a *Contact for a Partner* (a representative of a partner). It is possible for someone to appear as both, or even appear as a contact multiple times, if they represent more than one company. You must select at least one option, but may select more than one to include all eligible records.

**Selection Criteria**

Selection criteria for segments are defined similarly to those for Audiences.

See Chapter 7, “Using Audiences,” Creating and Updating Audiences, page 73.

### Segment/Count Generation

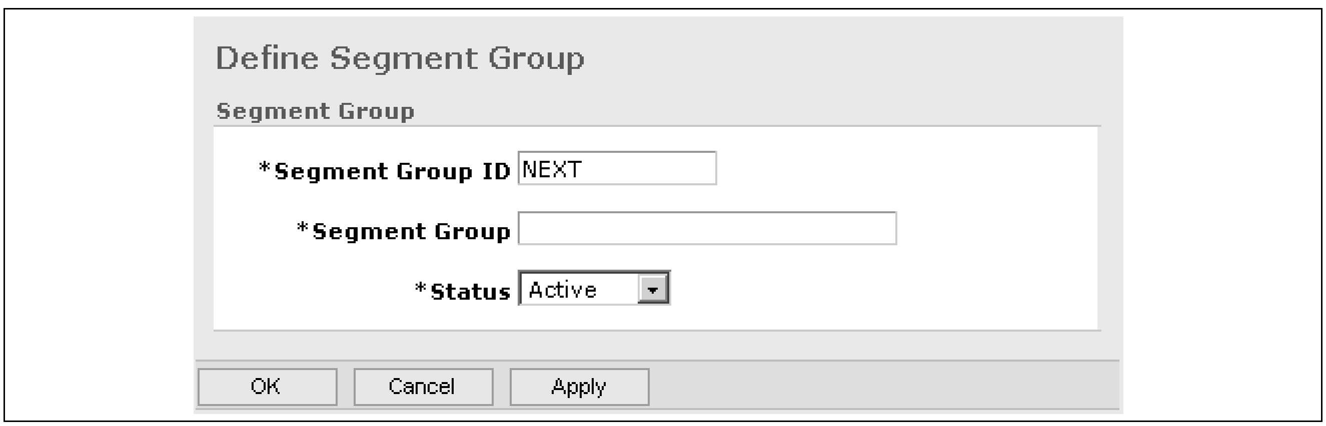
This section is identical to the Audience/Count Generation region on the Audience Details page.

See Chapter 7, “Using Audiences,” Creating and Updating Audiences, page 73.

## Defining a Segment Group

A Segment Group is a way to arrange segments and segment hierarchies into logical groupings.

Access the Define Segment Group page.




Define Segment Group page

**Segment Group ID**

Enter a unique character ID for the segment; by default the segment will be assigned the next available ID number.

**Segment Group**

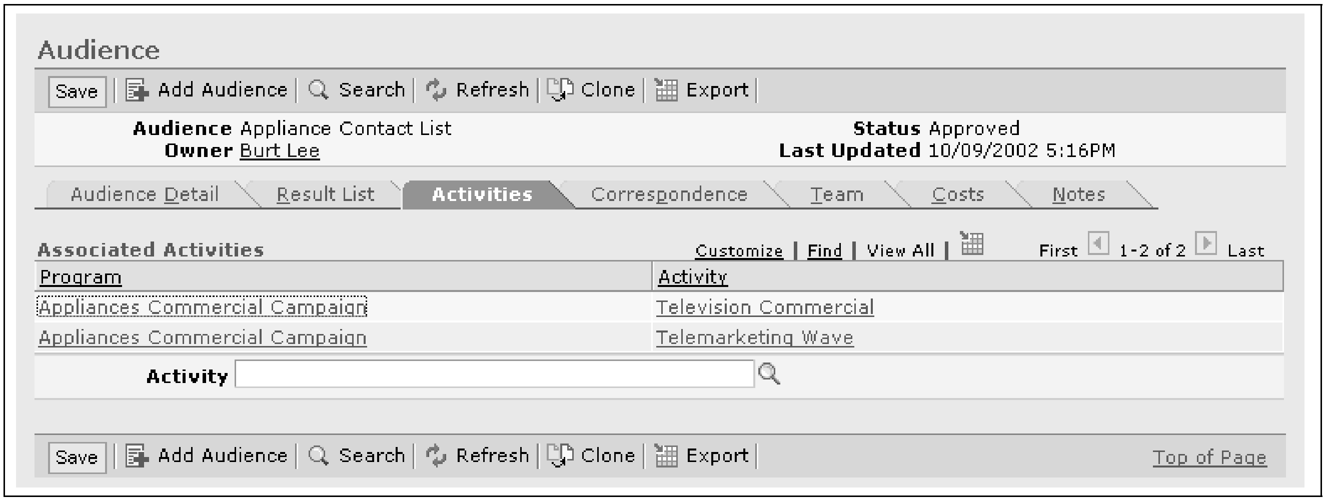
Enter a name for the segment group.

**Status**

Select Active to make the segment group available to have segments and hierarchies assigned to it; select Inactive to make it unavailable.

## Associating Audiences and Segments with Activities

Access the Audiences - Activities or Segments - Activities page.




Audience - Activities page

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

**Program** The descriptive name of the campaign to which an activity that is associated with the audience or segment belongs.

Click to access the Campaign Detail - Campaign Details page.

**Activity** An activity with which the audience or segment is associated.

Click to access the Campaign Detail - Activity Details page.

**Activity** To associate this audience or segment to a campaign activity, select the activity with which to associate the audience or segment. The association will be made when the audience or segment is saved.

## Creating Audience and Segment Plans

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

---

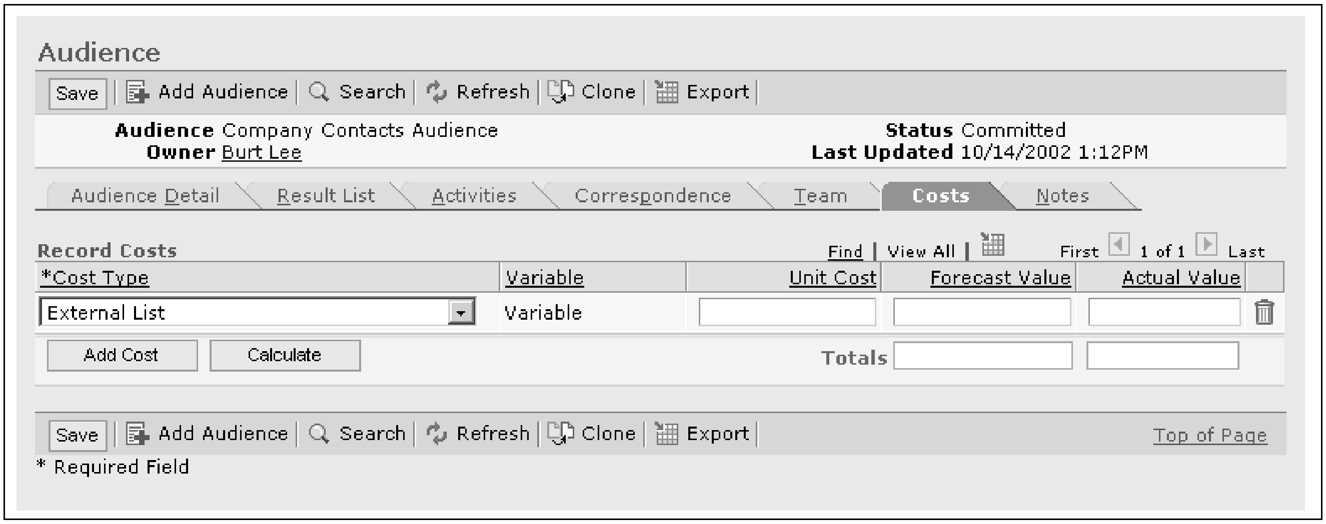
**Note.** The Plans page is only visible if the audience or segment has been published.

---

See *PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook*, “Creating Segment and Audience Plans”.

## Associating Costs with an Audience or Segment

Access the Audiences - Costs page or the Segment - Costs page.




Audiences - Costs page

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

| | |
|---|---|
| **Cost Type** | Select the cost to be associated with the audience or segment. |
| **Variable** | Displays whether the cost type is defined as variable or fixed. |
| **Unit Cost** | Enter the cost of one unit. |
| **Forecast Value** | Enter the expected cost of all units. |
| **Actual Value** | Enter the actual cost of all units. |

## Viewing and Adding Audience or Segment Notes

Access the Audiences - Notes page.

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

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

## Removing Records From a Generated Audience

Access the Audience - Result List page.


| Last Name | First Name | Middle Name | Salutation | Suffix |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| Albright | Fred | | | |
| Albright | Fred | | | |
| Sanchez | Gabrielle | | | |
| Levy | Rick | | | |
| Williams | Victoria | | | |
| Cox | Terry | | | |
| Lee Campton | Becky | | | |
| Boyd | Jimmy | | | |
| Washington | Sarah | | | |
| Worthington | Ron | | | |
| Chase | John | | | |
| Jensen | Will | | | |
| Brown | Maggie | | | |
| Morrissey | Roger | | | |
| Ward | Rachel | | | |
| Walsh | Jacob | | | |
| Santiago | Tomas | | | |
| Santiago | Tomas | | | |
| Santiago | Tomas | | | |
| Olson | Jordan | | | |
| Reese | Madison | | | |
| Rigalato | Frankie | | | |
| Kingston | Halle | | | |
| Kane | Nancy | | | |
| Kane | Nancy | | | |
| Chance | Billy | | | |
| Harrington | Mary Beth | | | |

Audience - Result List page

---

**Note.** The Audience - Result List page is not available until after the audience has been generated. Until the audience is generated, no records appear.

The Audience - Result List page enables you to remove selected records from a generated fixed audience. You can customize the information displayed on the tabs on the Audience - Result List page. Use this information to determine what records you want to remove from the audience.

You can delete and restore rows only for fixed audiences, not dynamic audiences or segments.

---

**Show Deleted Rows** Select the check box to return deleted records to the display.

**Select** Select the check box beside individual records to identify those you do not want to include in the audience, or click on Select All to select all records. Selected records are not executed against by any campaign activities using the audience.

**Note.** Removing a record from the audience does not delete it from the Audience table. The record is noted on the table as being removed, and does not display on this page the next time the page is accessed.

**Delete Selected Rows** Click the Delete Selected Rows button to remove selected records. The records are removed when the page is saved.

**Restore Selected Rows** Select the Show Deleted Rows check box, then click the Restore Selected Rows button to restore previously deleted records.

### Customizing Your Audience Records Page

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

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

## Managing Audience or Segment Correspondence

Access the Audiences - Correspondence or Segment - Correspondence page.

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

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

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

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

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Correspondence Management”.

See Chapter 4, “Setting Up PeopleSoft Marketing and Telemarketing,” Defining Audience Information, page 41.

## Defining Teams for an Audience

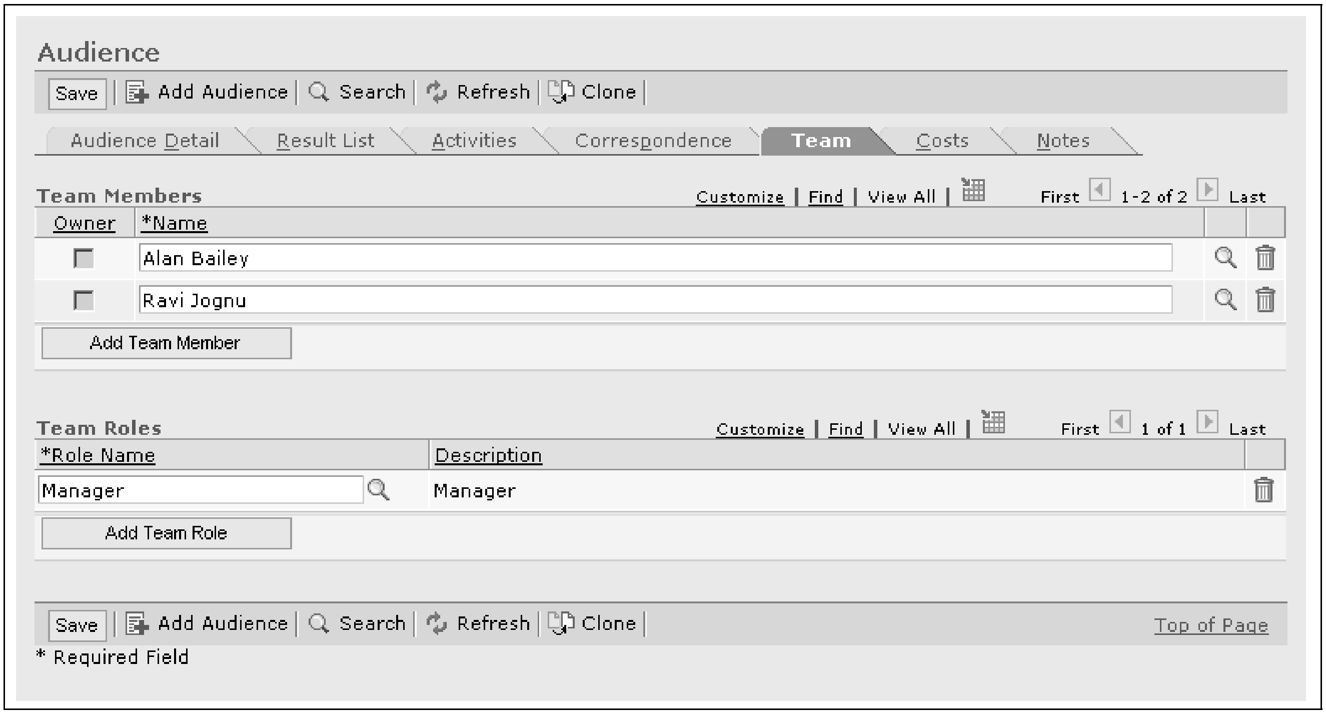
The Team page is where you associate team members to an audience. You can associated individual workers or entire roles as team members—in the case of roles, each individual worker who has that role will be considered a team member. Team membership can be used to control or limit who can access this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

---

**Note.** The audience or segment's owner as defined on the Audience Detail or Segment Detail page is always automatically added as a team member when the audience is saved.

---

Access the Audience - Team page.




Audience - Team page

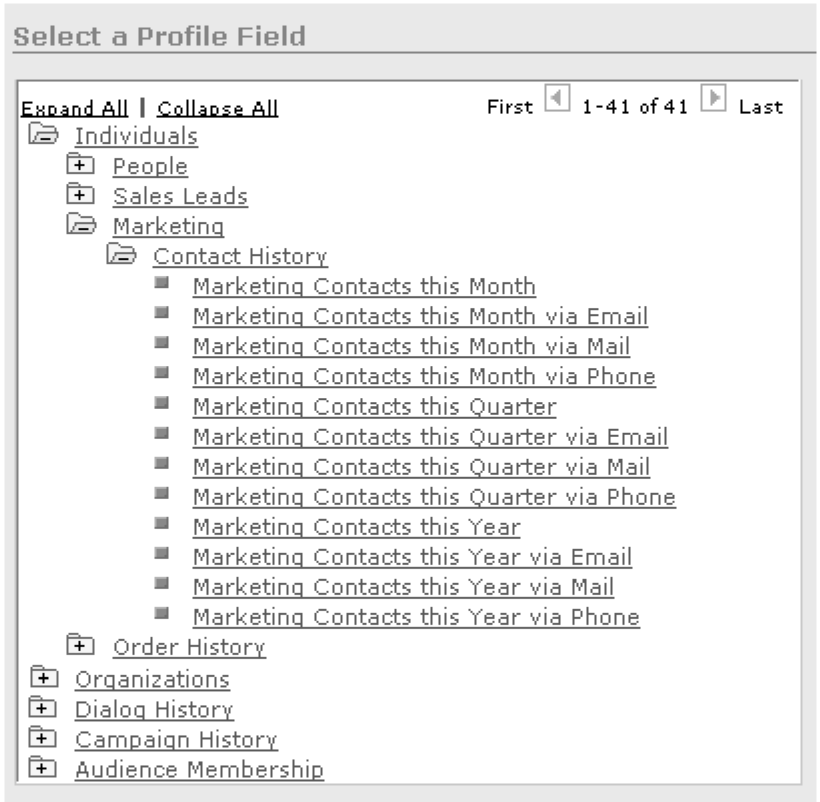
| | |
|---|---|
| **Owner** | Select this check box to designate the indicated person as the team owner. |
| **Name** | Type a name in the field or use the lookup to select one. |
| **Add Team Member** | Click this button to add another row to the list. |
| **Role Name** | Enter a role name or use the lookup to select one. |
| **Add Team Role** | Click this button to add another row to the list. |

## Using Predelivered Active Analytics Framework Terms with Audiences

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

## Marketing Interaction Data

You can use marketing interaction contact frequency information to define audience search criteria in Audience Builder. The following AAF Terms are available in the Marketing, Contact History folder. All are of data type Number and Implementation Type SQL Object.




Contact History

---

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

---

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

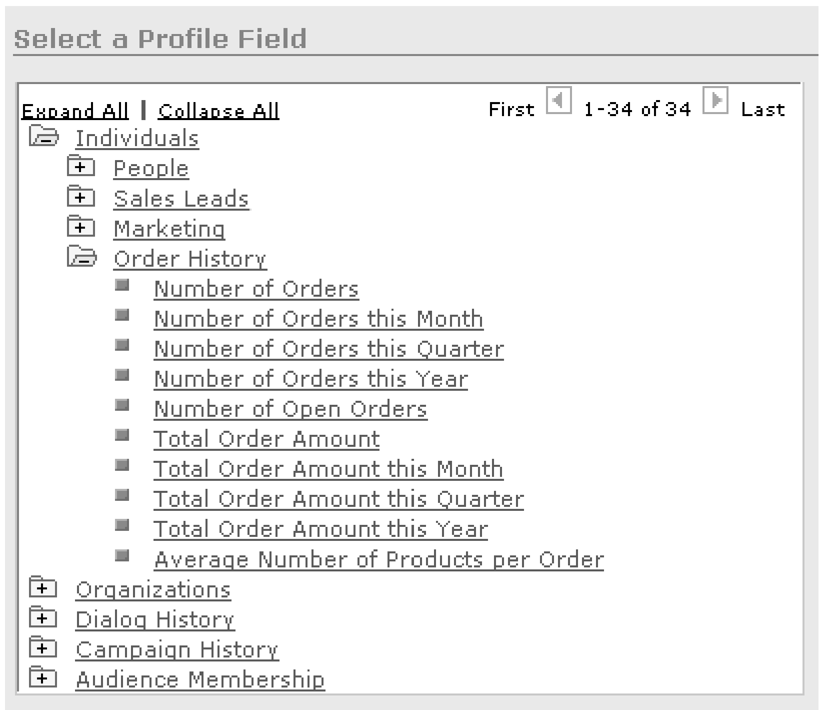
Phone contacts are calculated from Telemarketing interactions and call result data.

Email and Direct Mail contacts are calculated from Correspondence Request interactions which were initiated from a Campaign or Audience.

## Order History Data

You can define selection criteria using Order History data.

The following Order History AAF Terms are available under the Audience Builder Order History folder.




Order History

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

- Number of Orders this Month*
- Number of Orders this Quarter*
- Number of Orders this Year*
- Number of Orders*
- Number of Open Orders**
- Total Order Amount this Month*
- Total Order Amount this Quarter*
- Total Order Amount this Year*
- Total Order Amount*
- Average Number of Products Per Order*

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

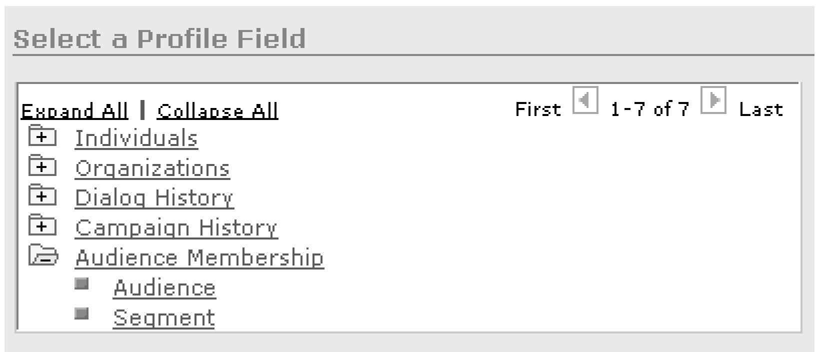
**Orders with status New and Hold are included in these calculations.

# Using History and Audience Membership Data with Audiences

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

## Audience and Segment Membership

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




Audience Membership

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

See Chapter 7, "Using Audiences," Creating and Updating Audiences, page 73.

## Marketing Execution and Response Data

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

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

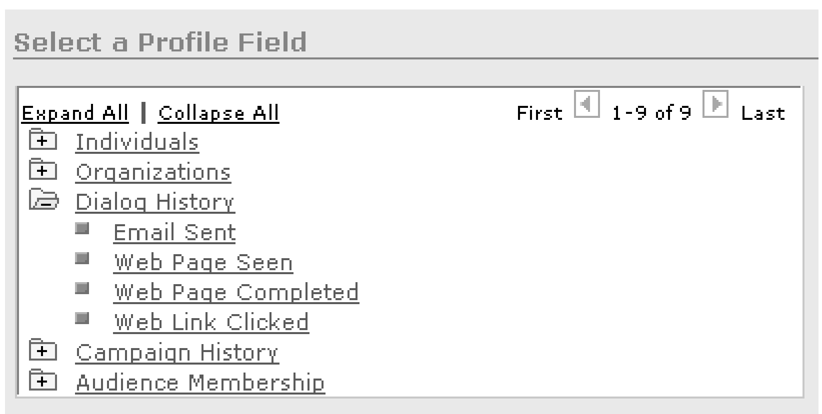

Campaign History

| Data Item | Description |
|---|---|
| Campaign Activity Executed | Choose from a list of executed campaign activities. The query returns all individuals that were targeted (or not targeted) by the identified campaign activity via Correspondence Management Email or Direct Mail, or Telemarketing call. |
| Lead Accepted | Choose from a list of executed campaign activities. The query returns all individuals whose Sales Lead created by that campaign activity was accepted (or not accepted). |
| Order Placed | Choose from a list of executed campaign activities. The query returns all individuals who have (or have not) placed an order and referenced the campaign activity's Promotion Code. |

## Dialog Execution and Response Data

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

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

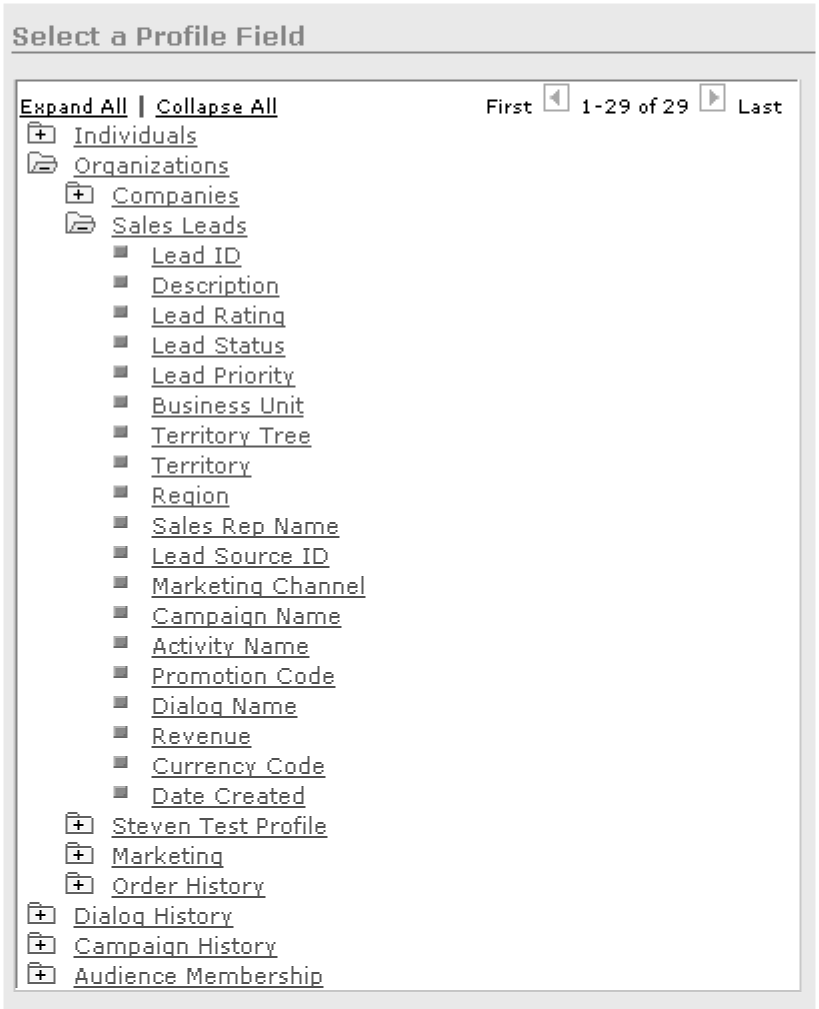



Dialog History

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

# Using the Sales Leads Profile with Audiences

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




Sales Leads

| Sales Leads Profile Field | Use Type |
|---|---|
| Lead ID | Text |
| Description | Text |
| Lead Rating | Choose One |
| Lead Status | Choose One |
| Lead Priority | Choose One |
| Business Unit | Prompt |
| Territory Tree | Prompt |

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

## Defining Active Analytics Framework Terms for Audiences

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

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

### AAF Resolution Methods

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

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

### AAF Implementation Limitations

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

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

- Only implementations that have binds BO_ID_PERSON or BO_ID_CUSTOMER are supported. One or the other of these two binds is required.
- Only implementations with the following return data types are supported:
  - String
  - String Array
  - Number
  - Number Array
  - Date
  - Date Array
  - Time
  - Time Array
- SQL Object implementations must return a *single* column only.
- Meta-SQL is not supported in Audience queries. Meta-SQL that cannot be resolved by Audience Builder itself cannot be used within SQL Objects' SQL text or Record.Field's Where clauses. Audience Builder can resolve only the following Meta-SQL Terms:
  - %DateIn
  - %TimeIn
  - %DateTimeIn
  - %CurrentDateIn
  - %CurrentTimeIn
  - %CurrentDateTimeIn
  - %Upper

### AAF Term Requirements

The following must be true of any AAF Term available to the Audience Builder:

- The return data type must be a scalar type of: String, Number, Date, Time, or Datetime.
- The Number of Values attribute can be either One or Many.
- The Term must have an Audience Builder contextual implementation defined. The implementation must meet the requirements noted above for supported implementations and resolution methods.

### Supported Operators

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

| Term Data Type | Implementation Returns One/Many | Supported Operators |
|---|---|---|
| String | One | is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, contains**, not contains**, starts with*, not starts with*, ends with*, not ends with*, is one of*<br><br>*Supported only for Terms implemented with the Audience Select Record.Field resolution method (not the Audience Select SQL Object resolution method)<br><br>**Supported only for Terms implemented with the Audience Select Record.Field resolution method and only in Advanced Mode |
| String | Many | has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than |
| Number | One | is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, is one of |
| Number | Many | has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than |
| Date | One | is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, is one of, is equal to current date, is after current date, is prior current date |
| Date | Many | has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than, has any equal current date, has any prior current date, has any after current date, has all equal current date, has all prior current date, has all after current date, has none equal current date, has none prior current date, has none after current date |
| Time | One | is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, is one of |
| Time | Many | has at least one, has none, has only, has other than, has only empty, has none empty, has at least one empty, has other than empty, has all less than, has all more than, has none less than, has none more than, has any less than, has any more than |

## WITH Clauses

With clauses are supported between multiple Terms if each Term meets the following criteria:

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

With clauses function in the same way as they do for Many-Row profile fields, and are available only in Advanced Mode.

### Criteria Value Prompting

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

- Prompt (prompt table)
- Translate (XLAT)

Multi-select prompting is not supported.

# Exporting Audiences

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

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

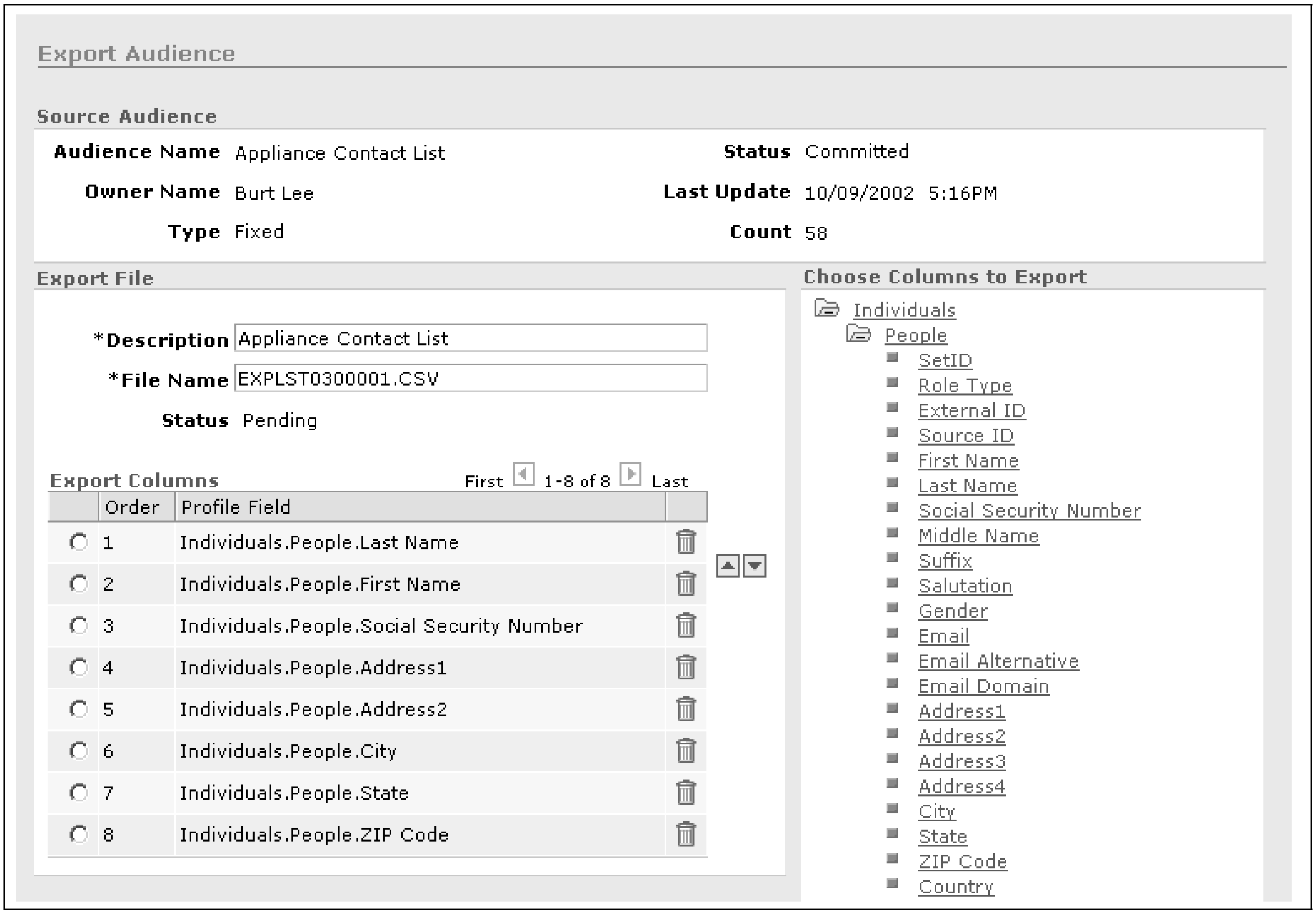
In this section we discuss how to export an audience.

## Page Used to Export Audiences

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Export Audience | RA_EXPORT_AUDIENCE | Click the Export this Audience button on the toolbar. | Create a version of an audience in a common file format that can be exported for use outside the PeopleSoft CRM application suite. |

## Exporting an Audience

Access the Export Audience page.



Export Audience page

**Description** Enter a description of the audience.

**File Name** The system automatically creates a file name for the export file. You can change the file name if desired.

## Selecting Profile Fields to Export

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

## Arranging the Export Columns Order

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

---

**Note.** Changing the Export Columns order after an export audience has been created will not change the order in the created file. To change the order, you must rerun the process.

---

## Exporting the File

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

### See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

CHAPTER 8

# Using PeopleSoft Marketing Workflow

This chapter provides an overview of Marketing Workflow using Active Analytics Framework and lists the delivered workflow for:

- Campaigns and campaign tasks.
- Content and content tasks.
- Offers.

### See Also

*PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework"

## Delivered Workflow for Campaigns and Campaign Tasks

The following table shows the delivered workflow for campaigns.

| Campaign Policy Name | Trigger Point Name | Action Name | Role Name | Correspondence Package | Mode |
|---|---|---|---|---|---|
| Campaign Status changed to Stopped | After a Campaign is Saved | Worklist to Campaign Manager | Marketing Campaign RoleUser | | |
| | | TimeOut Email to Campaign Manager | Marketing Campaign RoleUser | Campaign Status Changed | Async after 5 minute delay |
| | | Email to Campaign Manager | Marketing Campaign RoleUser | Campaign Status Changed | |
| Campaign Status changed to Approved | After a Campaign is Saved | Worklist to Campaign Manager | Marketing Campaign RoleUser | Campaign Status Changed | |

| Campaign Policy Name | Trigger Point Name | Action Name | Role Name | Correspondence Package | Mode |
|---|---|---|---|---|---|
| | | Timeout Email to Marketing Manager | Marketing Campaign RoleUser | | |
| Campaign Status Changed to InReview | After a Campaign is Saved | Worklist to Campaign Manager | Marketing Campaign RoleUser | Campaign Status Changed | |
| | | TimeOuts to Campaign Manager | Marketing Campaign RoleUser | Campaign Status Changed | Async after 1 minute delay |
| | | Worklist to Marketing Manager | Marketing Campaign RoleUser | Campaign Status Changed | |
| Campaign Status changed to Declined | After a Campaign is Saved | Worklist to Campaign Manager | Marketing Campaign RoleUser | Campaign Status Changed | |

The following table shows the delivered workflow for campaign tasks.

| Campaign Task Policy Name | Trigger Point Name | Action Name | Role Name | Correspondence Package | Mode |
|---|---|---|---|---|---|
| Campaign Task Status is changed to Rejected | After a Campaign is Saved | Email to Campaign Task Owner | Marketing Campaign Task Owner | Campaign Task Status Changed | |
| | | Email to Campaign Manager | Marketing Campaign RoleUser | Campaign Task Status Changed | |
| Campaign Task Status is changed to Assigned | After a Campaign is Saved | Email to Task Assignee | Marketing Campaign Task Assignee | Campaign Task Status Changed | |
| Campaign Task Status is changed to Completed | After a Campaign is Saved | Email to Campaign Manager | Marketing Campaign RoleUser | Campaign Task Status Changed | |

| Campaign Task Policy Name | Trigger Point Name | Action Name | Role Name | Correspondence Package | Mode |
|---|---|---|---|---|---|
| Campaign Task Status is changed to Over Due | After a Campaign is Saved | Worklist to Campaign Task Assignee | Marketing Campaign Task Assignee | | |
| | | TimeOut Email to Campaign Manager | Marketing Campaign RoleUser | Campaign Task Status Changed | |
| Marketing Auto List Load | After a Campaign is Saved | | | | |

## Configuring Delivered Workflow for Content and Content Tasks

The following table shows the delivered workflow for content.

| Content Policy Name | Trigger Point Name | Action Name | Role Name | Correspondence Package | Mode |
|---|---|---|---|---|---|
| Content Status changed to Completed | After a Content is Saved | Content Worklist | Marketing Content Owner | | |
| Content Status changed to Planning | After a Content is Saved | Content Email | Marketing Content Owner | Content Status Changed | |
| Content Status changed to Re-Work | After a Content is Saved | Content Worklist | Marketing Content Owner | | |
| | | Content Email | Marketing Content Owner | Content Status Changed | |

| Content Policy Name | Trigger Point Name | Action Name | Role Name | Correspondence Package | Mode |
|---|---|---|---|---|---|
| | | Content Time Out | Marketing Content Owner | Content Status Changed | Async after 5 minute delay |
| Content Status changed to InReview | After a Content is Saved | Content Worklist | Marketing Content Owner | | |

The following table shows the delivered workflow for content tasks.

| Content Task Policy Name | Trigger Point Name | Action Name | Role Name | Correspondence Package | Mode |
|---|---|---|---|---|---|
| Content Task Status Changed to Assigned | After a Content is Saved | Content Task Worklist | Marketing Content Task Assignee | | |
| | | Content Task Email | Marketing Content Task Assignee | Content Task Status Change | |
| | | Content Task Email | Marketing Content Task Assignee | Content Task Status Change | Async after 5 minute delay |
| Content Task Status Changed to Completed | After a Content is Saved | Content Task Worklist | Marketing Content Task Owner | | |
| Content Task Status Changed to Over Due | After a Content is Saved | Content Task TimeOut | Marketing Content Task Assignee | Content Task Status Change | Async after 1200 minute delay |
| Content Task Status Changed to Rejected | After a Content is Saved | Content Task Worklist | Marketing Content Task Owner | | |

# Configuring Delivered Workflow for Offers

The following table shows the delivered workflow for offers.

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

# CHAPTER 9

# Creating Campaigns and Activities

This chapter provides an overview of campaigns and activities and discusses how to:

- Create campaigns.
- Generate sales leads and telemarketing prospects from a campaign audience.

## Understanding Campaigns and Activities

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

This section discusses:

- Campaign structure.
- Campaign and activity statuses.
- Campaign characteristics.
- Tasks associated with campaigns.
- Campaign triggers.
- Rollup campaigns.
- Activity characteristics.
- Campaign objects associated with activities.

### It Starts with a Campaign

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

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

## Rollups

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

---

**Note.** You designate marketing programs as rollups so that you can establish campaign hierarchies. Marketing programs function the same, whether they are rollups or standard campaigns. A *rollup* occupies the highest level of the PeopleSoft Marketing hierarchy and contains one or more standard *campaigns* or *dialogs*.

---

## Campaign Characteristics

Every campaign has the following characteristics:

**Campaign objective**

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

**Campaign team**

A campaign team represents people who are responsible for, or interested in the results of the campaign. A campaign team can include not only *workers* (employees), but also other *companies*, *sites*, *partners*, and *partner contacts*. Including someone in the campaign team enables workflow functionality. You assign the campaign team on the Plan Campaign Program or Plan Rollup Program page.

**Campaign owner**

Employee responsible for the campaign. A campaign owner:

- Takes responsibility for the successful design and execution of a campaign.
- Is functionally the same as any other employee.
- Serves as campaign manager.

## Activity Characteristics

Every activity has the following characteristics:

**Budget**

Money allocated for the activity.

**Activity Type**

Tactic that you use to influence the target audience.

**Marketing Channel**

Medium that you use to deliver the message.

**Channel Detail**

Specific media outlet that you use to deliver the message.

Define activity characteristics on the Campaigns - Activity Detail page.

### Activity Budgets and Costs

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

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

### Activity Type

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

### Marketing Channel and Channel Detail

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

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

## Associating Audiences, Offers, Content, and Scripts with Activities

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

### Audience

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

### Offer

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

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

### Content

Content includes all the material that you produce to support a campaign, for use both inside and outside the organization. Examples of content include:

- Press kits.
- Television commercials.
- Market research summaries.

### Scripts

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

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

You can associate a script with each activity. The type of script is determined based on the marketing channel selected. Only telemarketing uses outbound scripts; all other channels use inbound scripts.

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

---

**Note.** Scripts cannot be executed within the PeopleSoft Marketing application. Scripts can be executed using various other PeopleSoft CRM applications, including PeopleSoft Telemarketing. You associate scripts with activities within PeopleSoft Marketing for use by the PeopleSoft Telemarketing application.

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### See Also

Chapter 7, "Using Audiences," page 67

Chapter 6, "Using Offers," page 59

Chapter 5, "Creating Campaign Content," page 49

*PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* "Defining Scripts"

## Campaign Triggers

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

### Trigger Schedules

Using triggers, you can initiate up to six actions:

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

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

### Tasks Associated with Campaigns

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

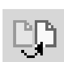
You define and update tasks on the Task Shells and Task Sets pages. You associate tasks with campaigns on the Marketing Programs - Tasks page.

### Understanding Campaign and Activity Status

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

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

## Common Elements Used in this Chapter

| | |
|---|---|
|  **Clone this Campaign** | Click this button to clone this campaign.<br>**Note.** Cloned campaigns duplicate everything in the campaign definition except triggers and audiences. |
|  **Email** | Click this button to email campaign information to recipients. |
|  **Calendar** | Click this button to view the Marketing Calendar. |
|  **Reporting** | Click this button to display Interactive Reports you can use to analyze the marketing programs. |
|  **Add Program** | Click this button to display the Marketing Program Add page, where you can add new marketing programs. |

## Creating Campaigns

In this section, we discuss how to:

- Manage and define campaigns, assign campaign sponsors, and assign campaign team members.
- View and define campaign activities.
- Define triggers.
- View and define campaign tasks.

- View and manage campaign audiences.
- Define campaign costs.
- Measure campaign performance.
- View and manage campaign notes.
- View campaign attributes.
- View campaign schedules.

## Pages Used to Create Campaigns

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Marketing Program Search | RA_CM_HOME_GRD | Marketing, Marketing Programs | View a list of marketing campaigns, access existing campaigns, and add new campaigns. |
| Marketing Program Add | RA_PROGRAM_ADD | Marketing, Marketing Programs, click the Marketing Program Add tab | Use to add a new Marketing Program (Campaign, Dialog, or Rollup). |
| Marketing Programs - Plan Campaign Program | RA_CAMPAIGN_DETAIL | Click the program name on the Program Management page | Define new marketing campaign programs or edit existing ones. |
| Marketing Programs - Activity Summary | RA_CMPGN_ACTIVITY | Marketing, Marketing Programs, Plan Campaign Programs, Activities | Access existing activities and attach additional activities to the campaign. |
| Marketing Programs - Triggers | RA_CAMPAIGN_TRIGER | Marketing, Marketing Programs, Plan Campaign Programs, Triggers | View summary information about existing triggers and add new triggers. |
| Marketing Programs - Tasks | RA_CAMPAIGN_TASK | Marketing, Marketing Programs, Plan Campaign Program, Tasks | View existing campaign tasks and add new tasks. |
| Marketing Programs - Costs | RA_CAMPAIGN_COSTS | Marketing, Marketing Programs, Plan Campaign Program, Costs | Track costs not associated with an activity. View all costs associated with the campaign including all activities. Costs are summarized by activity and by cost type. |
| Marketing Programs - Audience | RA_CM_LIST_SUMRY | Marketing, Marketing Programs, Plan Campaign Program, Audience | Attach target audience lists to campaigns. |
| Marketing Programs - Performance | RA_CMPGN_METRICS | Marketing, Marketing Programs, Plan Campaign Program, Performance | Measure the effectiveness of marketing campaigns. |
| Marketing Programs - Notes | RA_CAMPAIGN_NOTES | Marketing, Marketing Programs, Plan Campaign Program, Notes | View descriptions of campaign notes, add new notes. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Marketing Programs - Attributes | RB_ATTR_RUN_CMPG | Click the View Attributes link on the Plan Campaign Program page. | View campaign attributes. |
| Marketing Calendar | RA_CALENDAR | Marketing, Marketing Calendar<br>or<br>Click the Marketing Calendarbutton on the Plan Campaign Program page. | View the time relationships of all campaigns. |

## Managing Campaigns

Access the Marketing Program Search page.

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

To add a new campaign, access the Marketing Program Add page.

---

**Note.** The Marketing Program Search page is a configurable search page. You can configure this page to suit your personal search needs. Refer to the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook* for complete information.

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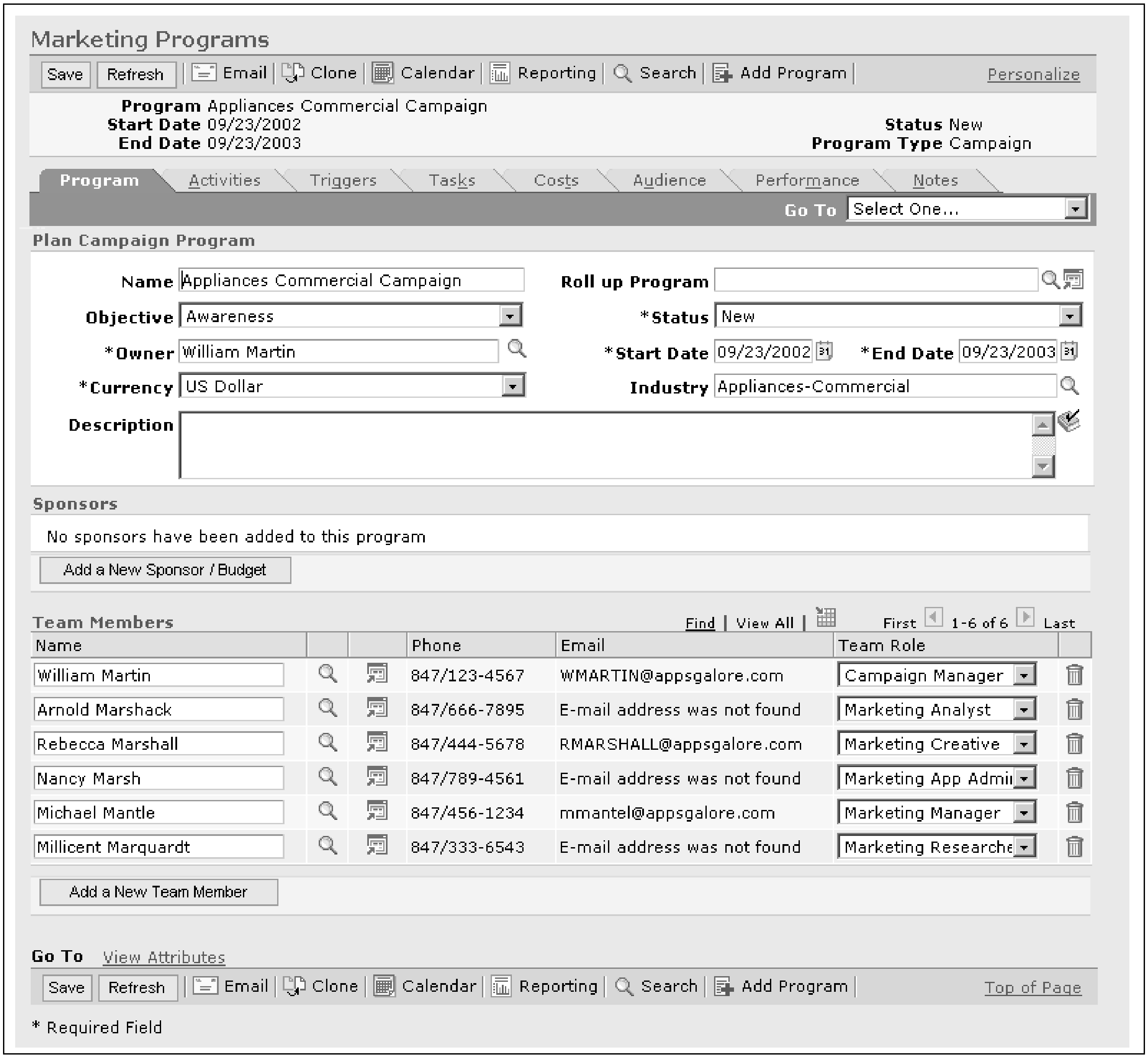
**Note.** Selecting a rollup name in the Program Rollup Name search field returns all related campaigns and dialogs that use this rollup name as the marketing program to roll up to, and not the rollup program itself. To find the rollup program, enter the program name of the rollup or change the program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

---

## Defining Campaigns

Access the Marketing Programs - Plan Campaign Program page.




Marketing Programs - Plan Campaign Program page

**Name**

Enter a descriptive code to identify the campaign.

---

**Note.** Campaign names do not need to be unique. However, duplicate campaign names might confuse users.

---

**Roll up Program**

If this campaign is part of a rollup, select the descriptive name of the parent rollup of which this campaign is a part.

**Objective**

Select an objective from the available options to describe you will accomplish with this campaign.

**Status**

Select the position of the campaign in its life cycle.

**Note.** Once the campaign status is set to Executing or Approved, nothing in the definition can be changed without changing the campaign status.

**Owner** Displays the descriptive name of the user who is primarily responsible for the campaign.

**Start Date** and **End Date** Enter the date when the campaign begins and ends. Start and end dates for campaigns that are part of a rollup campaign must be within the range of the parent campaign.

**Currency** Select the monetary unit with which the campaign is funded.

**Industry** Select an industry group from the lookup.

**Description** Enter a detailed description of the campaign.

## Campaign Sponsors

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

**Note.** Sponsors must exist in the system as an entity, but do not have to be specially set up as a sponsor. If the sponsor you want to add does not exist as an entity within the system, you can add Company or Site names using Quick Create. If you have purchased PeopleSoft Partner Relationship Management, you can also include Partners as sponsors.

**Sponsor Name** Select a sponsor name from the lookup table.

**External** Select this check box if the sponsor is external (for example, a partner or partner contact).

**Budget Source** Select the department funding the campaign.

**Budget Amount** Enter the amount of money allocated for the campaign.

**Add a New Sponsor/Budget** Click the Add a New Sponsor/Budgetbutton to insert another sponsor or budget source.

**Note.** You can add one (and only one) budget without a name, allowing a budget amount to be entered and not associated with a particular name. (For example, if a campaign has no sponsor and its budget is 20,000.00, that budget can be entered without a name. If you enter names, you can also split that same budget across multiple named sponsors.)

See *PeopleSoft Enterprise Partner Relationship Management 8.9 PeopleBook*.

## Campaign Team Members

**Name** Select the name of each person included in the campaign team from the lookup table. Phone and Email information will display when available.

**Note.** Team members must exist in the system as an entity. If the team member you want to add does not exist as an entity within the system, you can add Company or Site names using Quick Create. You can also add Partner and Partner Contact names if PeopleSoft Partner Relationship Management is installed.

**Team Role** Select a role for each person on the team. Only persons with valid userIDs can have a role. Based on their team role, team members can also receive notification of campaign events. For example, a campaign manager can receive an email notice whenever a campaign is submitted for review or a worklist note whenever an activity is stopped prematurely.

**Add a New Team Member** Click to enter additional team members.

The following campaign team roles are delivered:

| Role | Description |
|---|---|
| Marketing Manager | • Manages the design and execution of campaigns.<br>• Determines campaign resources needs.<br>• Manages contact strategies.<br>• Approves campaigns.<br>• Selects campaign channels.<br>• Approves promotional offers.<br>• Oversees campaign budgets.<br>• Manages relationships with the managers of campaign channels (newspaper publishers, webmasters, and so on).<br>• Evaluates and fine-tunes campaigns in progress. |
| Campaign Manager | • Supervises campaign teams.<br>• Creates promotional offers.<br>• Manages detail planning and execution of one or several campaigns.<br>• Assigns specific tasks to campaign team members.<br>• Coordinates activities with other campaign managers.<br>• Evaluates campaigns in progress and suggests changes to the marketing manager.<br>• Establishes campaign budgets. |

| Role | Description |
|---|---|
| Marketing Analyst | • Defines, analyzes, and manages target audience lists.<br>• Maintains understanding of applications, including PeopleSoft Marketing.<br>• Helps create campaign hierarchies.<br>• Manages campaign elements, including audiences, offers, and content.<br>• Generates and analyzes campaign performance reports. |
| Marketing Researcher | • Performs exploratory analysis of marketing campaigns and target audience lists.<br>• Analyzes customer affinities and behaviors.<br>• Builds and manages predictive models for targeting audiences.<br>• Runs marketing optimization programs.<br>• Acts as liaison to the IT department. |
| Marketing Creative | • Creates campaign content.<br>• Manages relationships with ad agencies or an internal ad group.<br>• Manages the relationship with the fulfillment shop. |
| Marketing App Administrator (marketing application administrator) | • Creates user profiles.<br>• Sets up user security and roles.<br>• Defines marketing channels.<br>• Defines campaign objectives. |

---

**Important!** The preceding roles are defined for convenience. If your organization defines these campaign team roles differently, you can change role descriptions. If your organization uses different role names, you can add those role names.

---

## Go To

**View Attributes** Click to go to the Attributes page. The Attributes page displays any defined attributes associated with the campaign. Once clicked, the Attributes tab is included in the component tab navigation until this campaign is exited and another chosen.

## See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences”

## Accessing Activities and Attaching Additional Activities to Campaigns

Access the Marketing Programs - Activity Summary page.

The Activity Summary page displays summary and detail information about all activities attached to the campaign.

**Activity Name** Click a campaign's activity name to access details about the activity, where you can define additional activity attributes for the selected activity.

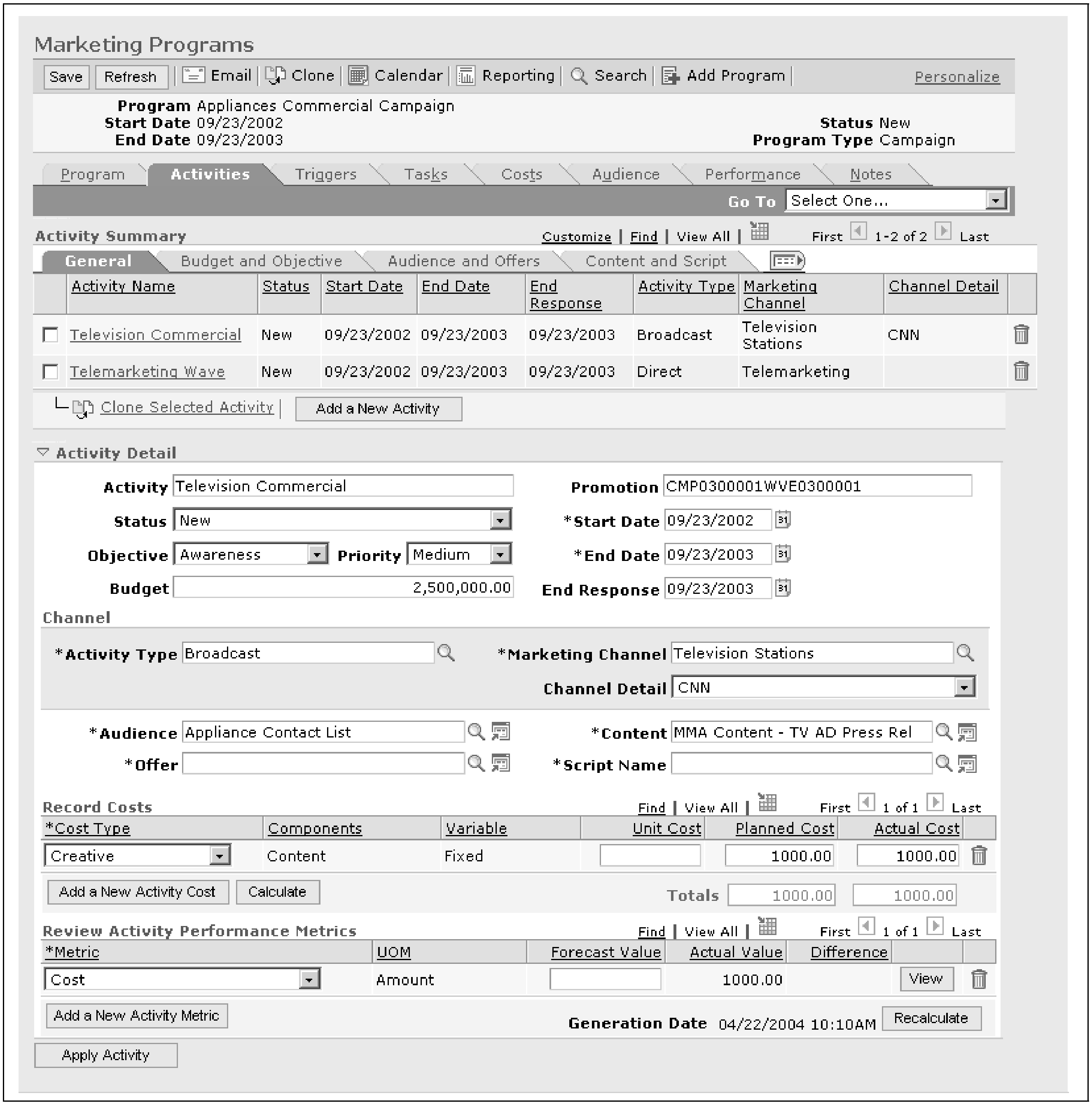
**Add a New Activity** Click to add a new activity.

**Note.** When adding a new activity, the system generates an activity name related to the name of the campaign. You have the option of entering a new activity name.

**Clone Selected Activity** Click to clone a selected activity. Select activities by selecting the check box beside the activity name. When you clone an activity, all associated costs and metrics are included, but can be edited.

## Defining Activities

Access the Marketing Programs - Activity Detail page.




Marketing Programs - Activity Summary page

## Activity Detail

**Activity** Enter a descriptive name to identify the activity.

**Note.** Activity names do not need to be unique. However, duplicate activity names might confuse users.

**Promotion** A unique code as it identifies the activity. This code is generated automatically. Promotion is used to integrate Marketing with Order Capture by associating the order with the offer that is on the activity record.

**Status** Displays the position of the activity in its life cycle.

**Note.** Only activities with a status of new can be deleted.

**Start Date** and **End Date** Enter the date when the activity begins and ends. The activity start date cannot precede the campaign start date. The end date cannot exceed campaign end date.

**Objective** Select the objective that describes the purpose of this activity.

**Priority** Select the priority of the activity. Your priority selection determines how multiple campaign activities are sorted for use by telemarketing.

**Budget** Enter the amount of money allocated for the activity. The system accepts standard monetary formats, such as 10,000 USD.

**Note.** Establish the campaign currency on the Marketing Programs - Plan Campaign Program page (Sponsor section).

**End Response** Enter a date equal to or later than the end date. The End Date allows the use of the activity by Sales beyond the activity's end date—for example, to allow time for late respondents in a mass mailing activity that has already ended.

## Channel

A channel is how you get the message to the audience. A full channel definition requires selection of both an Activity and a Marketing Channel. Under certain circumstances, a Channel Detail selection is needed as well.

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

Activity, Marketing Channel, and Channel Detail values are defined in setup.

**Activity Type** Enter the means by which you convey the marketing message.

**Marketing Channel** Enter the medium by which you convey the marketing message. For example, in a broadcast campaign you might use the channel types radio and television. Selection of the marketing channel may change the appearance of the Activities page display. For example, selection of *Telemarketing* causes the page to display the Specify Telemarketing Detailssection.

**Channel Detail** This field only appears when the Activity selection is *Broadcast* and the Marketing Channel selection is TV or Radio.

**Audience** If the channel execution is *Telemarketing*, *Sales Force*, *Order Capture,* or *Mail Correspondence,* select the audience that you want to attach to the activity.

**Package Name** If the channel execution is *Mail Correspondence,* select a correspondence package. Correspondence templates are created in the Correspondence setup component.

**Offer** If the channel execution is *Telemarketing*, *Sales Force*, *Order Capture,* or *Mail Correspondence,* select the offer that you want to attach to the activity.

**Content** If the channel execution is *Telemarketing*, *Sales Force*, *Order Capture,* or *Mail Correspondence,* select the content that you want to attach to the activity.

**Send Date** If the channel execution is *Mail Correspondence*, this field displays the date the message package (email or mail) was sent.

**Script Name** If the channel execution is *Telemarketing,* or *Order Capture,* select the script to be used when the activity executes.

---

**Note.** In PeopleSoft Marketing, you can associate scripts with activities for use by other PeopleSoft applications (for example, PeopleSoft Telemarketing), but you cannot execute scripts.

---

**Integration Method** Integration Method refers to how an activity executed through PeopleSoft Telemarketing integrates with other PeopleSoft applications. Telemarketing activities can be defined to automatically transfer qualified leads to PeopleSoft Sales for follow-up. Also, Telemarketing activities can be defined to enable agents to directly or indirectly process orders for contacts who wish to buy. These options are discussed more completely in the Telemarketing chapter.

Select *Order Capture Direct* to enable telemarketing agents to personally complete an order transaction.

Select *Order Capture Indirect* to enable telemarketing agents to transfer contacts who are ready to buy to an order capture agent.

Select *Sales Leads* to automatically transfer qualified leads to the PeopleSoft Sales application.

**Advisor** This lookup field displays when you select an Activity Type of In Bound and a Marketing Channel of AAF Action. It allows you to attach an Active Analytics Framework action to an activity.

Click the lookup to display the Advisor Search. You can see the Advisor detail in the Advisor Workbench.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Correspondence Management”.

See *PeopleSoft Enterprise CRM Real-Time Advisor 8.9 PeopleBook.*

## Activity Analytic Framework Policies

This grid appears when you create a new activity and set the activity type to Inbound and the Marketing Channel to AAF Action. If you select a trigger point and click the Create Policies button, you can create a new Active Analytics Framework policy. After you have created the policy and linked it to the campaign activity, the policy information will appear in the grid.

**Trigger Point** Select a trigger point from the available options.

**Add a Policy** Click this button to create a new Active Analytics Framework policy. You will be prompted to save the campaign first.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

## Record Costs

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

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

See Chapter 4, “Setting Up PeopleSoft Marketing and Telemarketing,” Defining Cost Elements, page 38.

### Review Activity Performance Metrics

Select the terms by which to measure campaign performance.

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

See Chapter 4, “Setting Up PeopleSoft Marketing and Telemarketing,” Defining and Creating Metrics, page 31.

## Using Triggers

Access the Marketing Programs - Triggers page.

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

---

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

---

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

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

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

The third trigger is to launch the telemarketing activity. This time you define a *Metric to Value* trigger specifying that when the response rate reaches a certain level, the telemarketing activity will launch. Once again, you execute the new activity, send notification, and generate a new audience from respondents.

---

**Note.** A trigger can be deleted until it has completed.

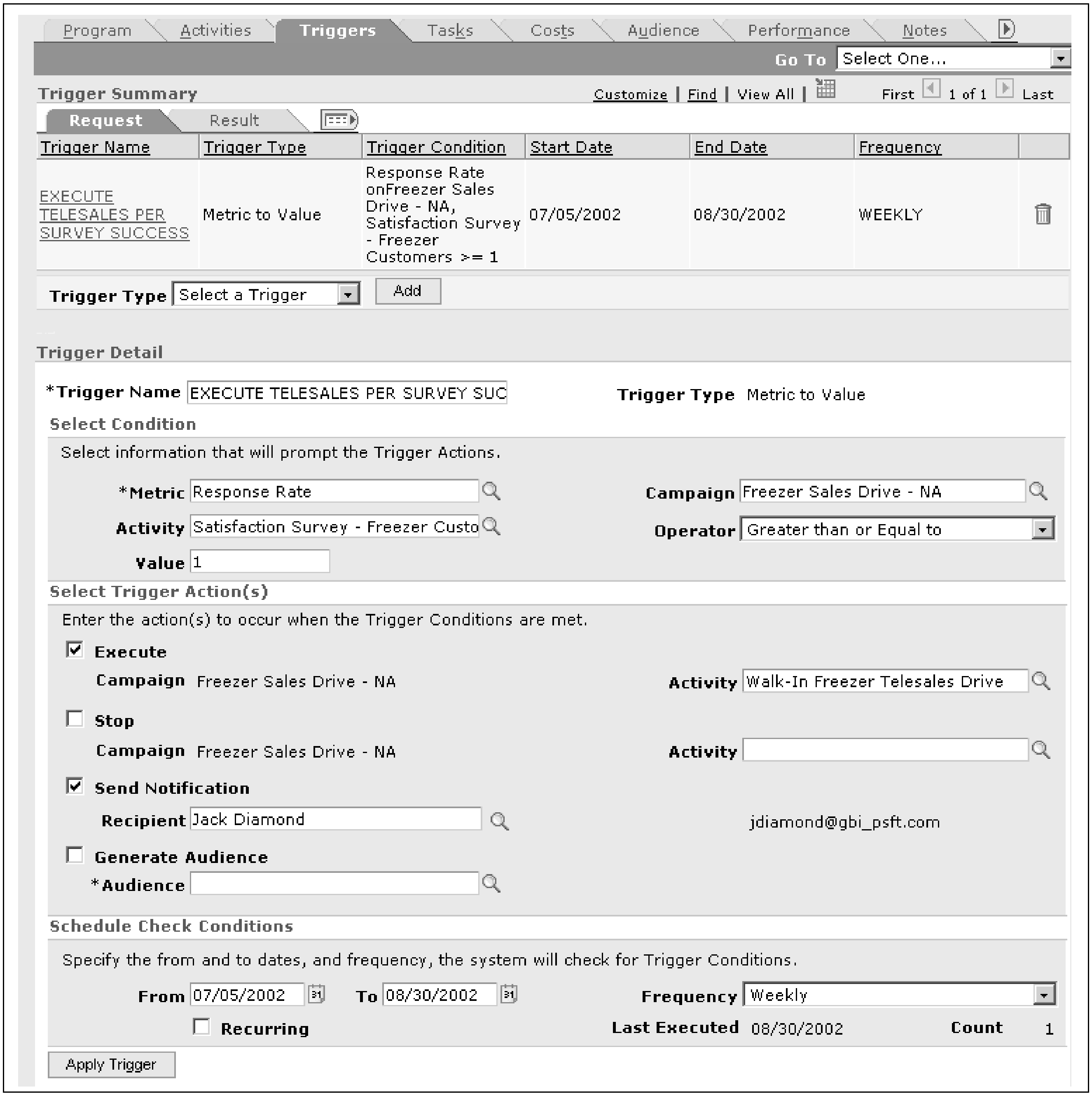
---

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

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

## Define a Trigger

Access the Marketing Programs - Trigger Summary page.




Marketing Programs - Trigger Summary page

**Trigger Name** Enter a descriptive name for the trigger.

**Trigger Type** Displays the trigger type you selected on the Marketing Programs - Trigger Summary page. Depending on the trigger type selection, different fields appear in the rest of the Select Condition region.

## Select Condition Group Box

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

| Trigger Type | Select Condition |
|---|---|
| *Date and Time* | • Date<br>• Time |
| *Metric to Metric* | • Metric One<br>• Campaign One<br>• Activity One<br>• Operator<br>• Metric Two<br>• Campaign Two<br>• Activity Two |
| *Metric to Value* | • Metric<br>• Campaign<br>• Activity<br>• Operator<br>• Value |

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

**Date**

Select the date when the system is to execute the trigger.

**Note.** The system displays this field only when you select the trigger type *Date and Time*.

**Time**

Enter the time when the system is to execute the trigger. The system recognizes standard time formats, for example, 2:30 p.m. or 02:30 PM or 14:30.

**Note.** The system displays this field only when you select the trigger type *Date and Time*.

**Metric, Metric One, Metric Two**

Select a performance metric to apply against a corresponding campaign or activity. Metric One and Metric Two labels indicate that the metric is applied against the campaign or activity with the same designation.

**Campaign One, Campaign Two**

Select a campaign against which you want to apply the metric. Selection of a campaign is required. Condition metrics may be applied against any executing campaign.

**Campaign**

This field displays the name of the current campaign.

**Activity, Activity One, Activity Two**

Select an optional activity within the specified campaign. When an activity is specified, the metric applies only against that activity and no others within the campaign.

**Operator** Select the operator by which to compare two metric results, or a metric against a fixed value. Operator values are:

- *Equal to*
- *Greater than*
- *Greater than or Equal to*
- *Less than*
- *Less than or Equal to*
- *Not Equal to*

---

**Note.** The following four operators are reserved for future use: *Divide, Minus, Multiply,* and *Plus.*

---

**Value** Enter a fixed value against which the metric result is compared.

---

**Note.** The system displays this field only when you select the trigger type *Metric to Value.*

---

### Select Trigger Actions Group Box

**Execute** Select the check box to execute an activity within the current campaign when the trigger condition is true. Execute actions only apply to the campaign activity and not to the campaign itself.

**Stop** Select the check box to stop a campaign, or an activity within the campaign, when the trigger condition is true. If no activity is selected, the stop action applies to the campaign.

**Send Notification** Select the check box to notify a person when the trigger condition is true. Select the person to notify in the Send Notification field.

**Generate Audience** Select the check box to generate an audience when the trigger condition is true. Select the audience to generate in the Generate Audience field. Schedule the Audience Generation Application Engine program to be run by the processor to generate the audience.

**Result** After the system attempts to execute a trigger—whether successfully or unsuccessfully—it displays a result message. If the trigger execution attempt is unsuccessful, the result message indicates the nature of the failure.

### Schedule Check Conditions

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

**From** and **To** Enter start and end dates and times between which the system will check for trigger conditions.

**Frequency** Select the schedule that determines how frequently the system checks whether trigger conditions have been met.

**Start Date** and **End Date** Enter dates when the system begins and stops checking whether trigger conditions have been met.

**Recurring** Select this check box if you want the trigger to recur.

**Note.** Recurring triggers generate an error if the EXEC or STOP action is requested and Recurring is selected.

### See Also

Chapter 4, "Setting Up PeopleSoft Marketing and Telemarketing," Defining Trigger Schedules, page 25

## Defining Campaign Tasks

Access the Marketing Programs - Tasks page.

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

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

**Task** Select a predefined Task Shell from the drop down list. To create a new task, select *Create a New Task*and define the new task as required. Otherwise, select a predefined task shell and modify if necessary. Click Add to go to the Marketing Program Tasks - Campaign Task Detail page where you can define a new task or modify an existing one.

**Task Sets** Select a previously defined task set from the drop down list. Selecting a task set automatically displays the single tasks in the set. Selecting another task set refreshes the display, and setting the value back to the default or adding the task set clears the display.

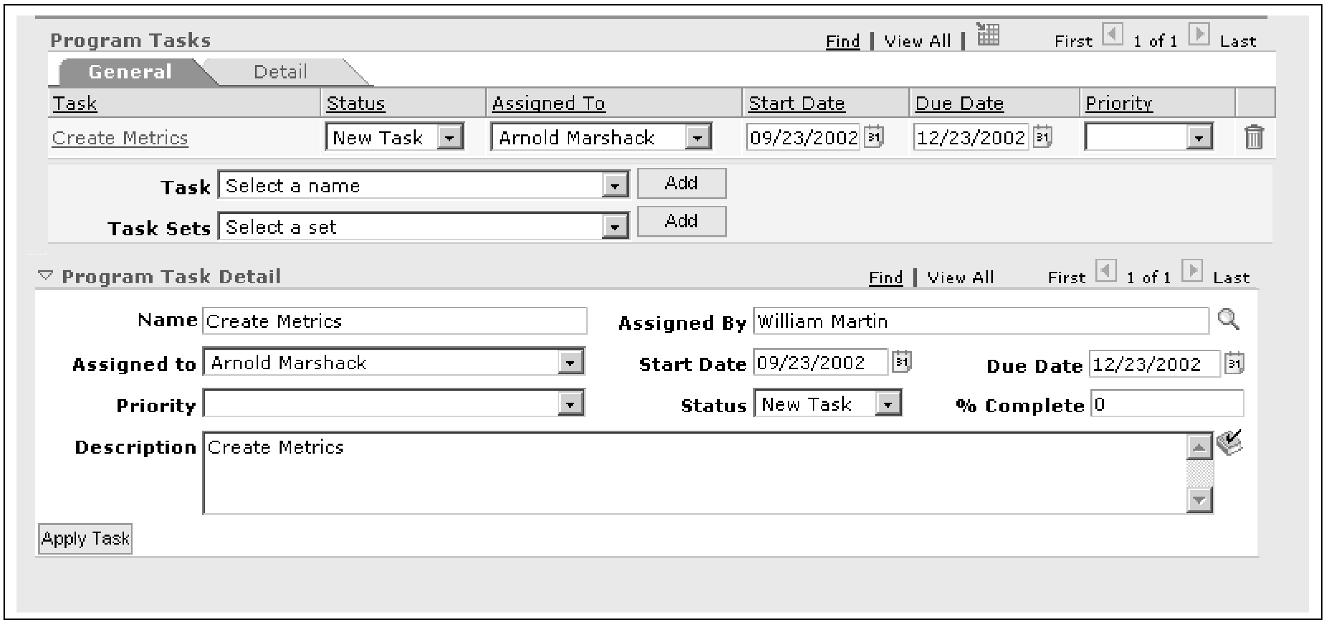
Use task sets as defined or modify as necessary. Click Add to add all tasks in a task set. View details about each task by clicking on the task name. Eliminate individual tasks by deleting them from the list.

### See Also

Chapter 4, "Setting Up PeopleSoft Marketing and Telemarketing," Defining Task Tools, page 44

## Creating and Updating Campaign Tasks

Access the Marketing Program Tasks - Program Task Detail page.




Program Task Detail page

**Name** — Enter a name for the task, or leave the shell default name.

**Assigned By** — The system automatically assigns the current user to this position. You can change this to any worker.

**Assigned to** — Select a user to execute the task. The user must be a member of the campaign team. Save the campaign to activate the task assignment.

---

**Note.** The system does not permit you to assign a task to a person who is not a member of the campaign team.

---

**Start Date** — Enter a date on which the task is to begin. On this date, a notification is added to the worklist of the team members assigned to the task.

**Due Date** — Enter a date on which the task is to be complete. This due date is compared against the % Complete field. If the task is not 100 percent complete by the due date, a workflow process sends notifications (when defined).

**Priority** — Select the urgency of the task. This information is for the benefit of the user, only. There is no logic attached to priority values. The values are:

- *High*
- *Medium*
- *Low*

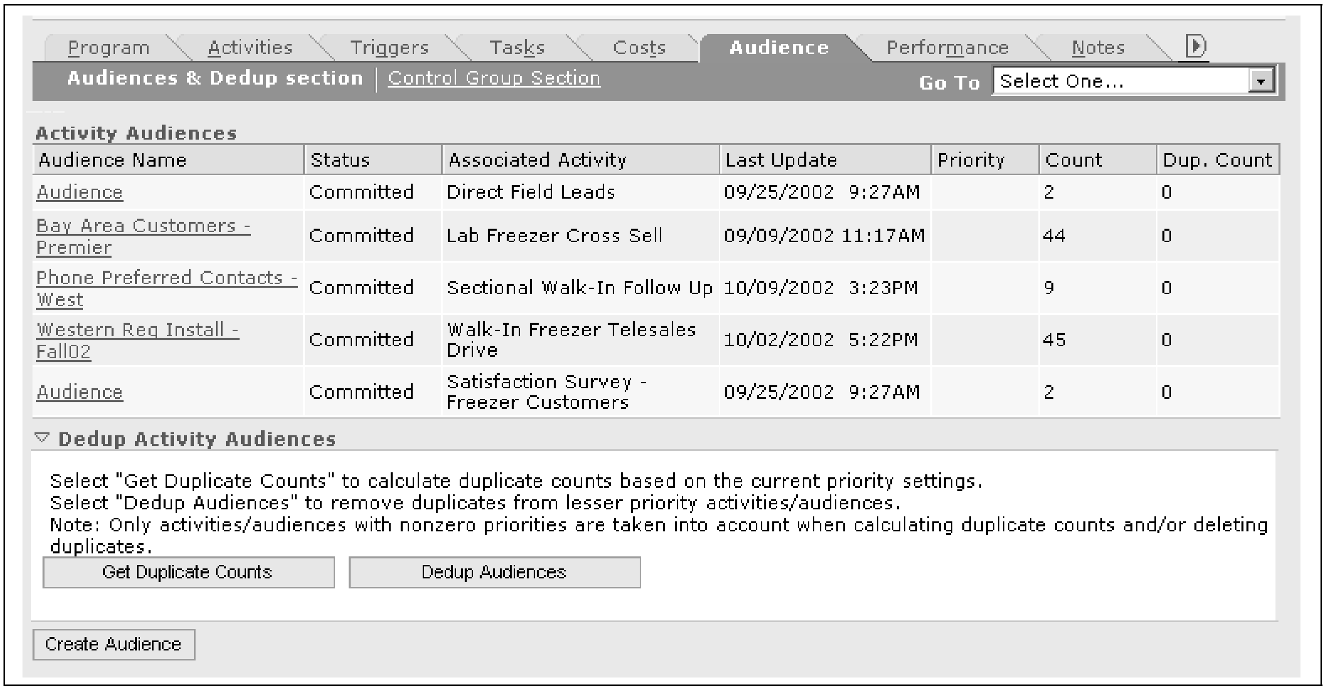
**Status** — Select the position of the task in its life cycle.

**% Complete** (percent complete) — Enter the percentage portion of the task that is complete.

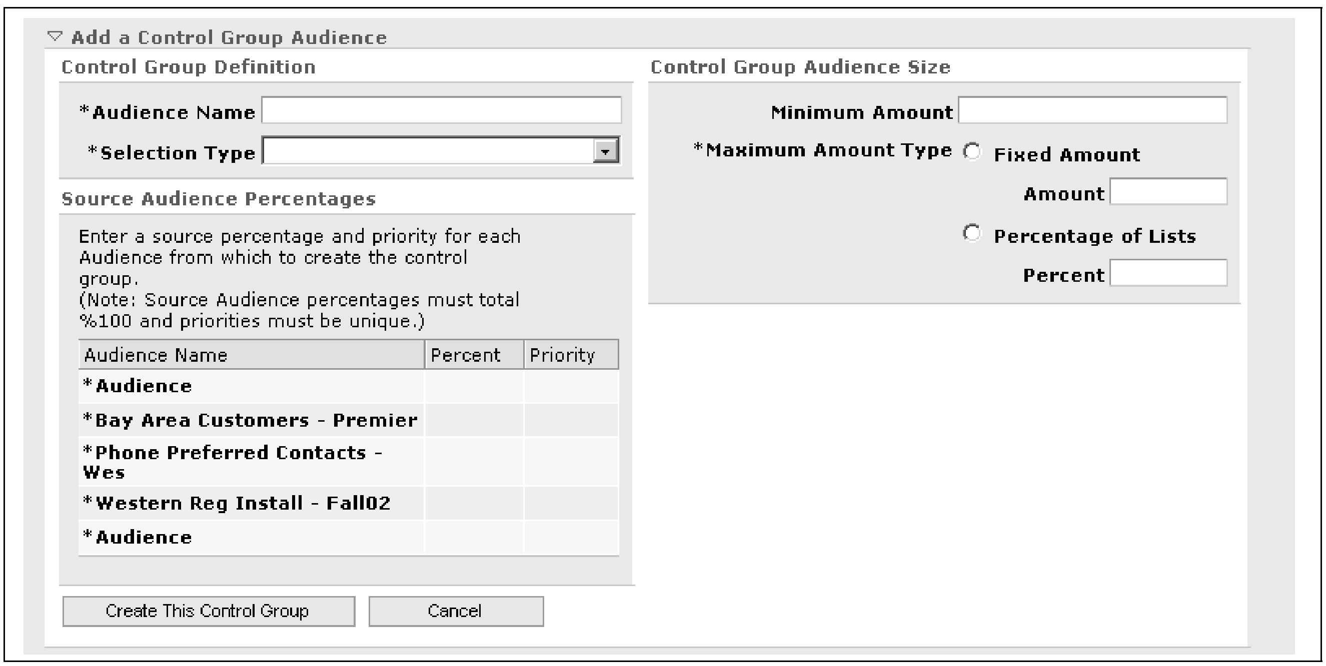
**Description** — Enter a description of the task, or leave the shell default description.

# Working with Campaign Audiences

Access the Marketing Programs - Audience page.




Marketing Programs - Audience page (1 of 2)




Marketing Programs - Audience page (2 of 2)

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

### Activity Audiences

The Activity Audiences group box displays information about all audiences associated with the campaign. Information displayed about each audience includes the name of the audience, audience status, the activity to which the audience is attached, the date the audience was last updated, the priority value of the audience, and the total count of records in the audience. Also included is a count of the number of records that are duplicated in other audiences associated with the campaign.

---

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

---

### Dedup Activity Audiences

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

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

---

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

---

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

### Add a Control Group Audience

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

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

**Audience Name** Enter a descriptive name for the control group audience.

**Selection Type** Select the manner in which the system selects specific records and people to place in control groups.

Select *Every Nth* to select record by an even distribution method. For example, for a control group consisting of five percent of the total audience, every 20th record is selected.

Select *Random* to select records on a random basis.

---

**Note.** The method used to randomly select records is not meant to produce a statistically valid random sample.

---

**Minimum Amount** Enter the smallest control group size that you consider acceptable. If the actual amount yielded by the selection process is less than the minimum, the process fails. The newly created control group audience is set to a status of *Designed* rather than *Generated* and a note is entered in the log indicating the reason.

**Maximum Amount Type** Select the manner in which the maximum size of the control group is determined.

Select Fixed Amount to specify an actual maximum number. Enter the maximum number.

Select Percentage of Lists to determine the control group count as a percentage of the combined audience total. Enter the percentage of the total number of control group members to draw from each of the audiences. The total percentage must equal 100. To prevent control group members from being selected from a particular audience, enter zero as a source percentage for that audience.

---

**Note.** You can draw control group members only from fixed audiences that have the status *Approved.*

---

**Create This Control Group** Click to generate a control group. The control group creation process is scheduled and run immediately.

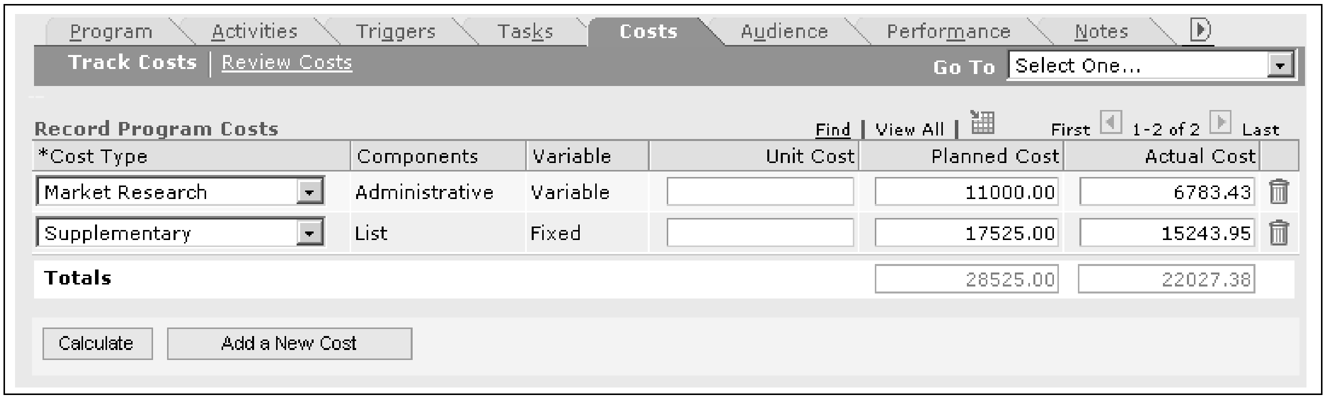
**Cancel** Click to cancel the control group definition before creating it. Once you click the Create This Control Group button, the process cannot be canceled.

## Working with Campaign Level Costs

You use the Marketing Programs - Costs page to track campaign level costs and review all costs associated with a campaign.

## Tracking Campaign Level Costs

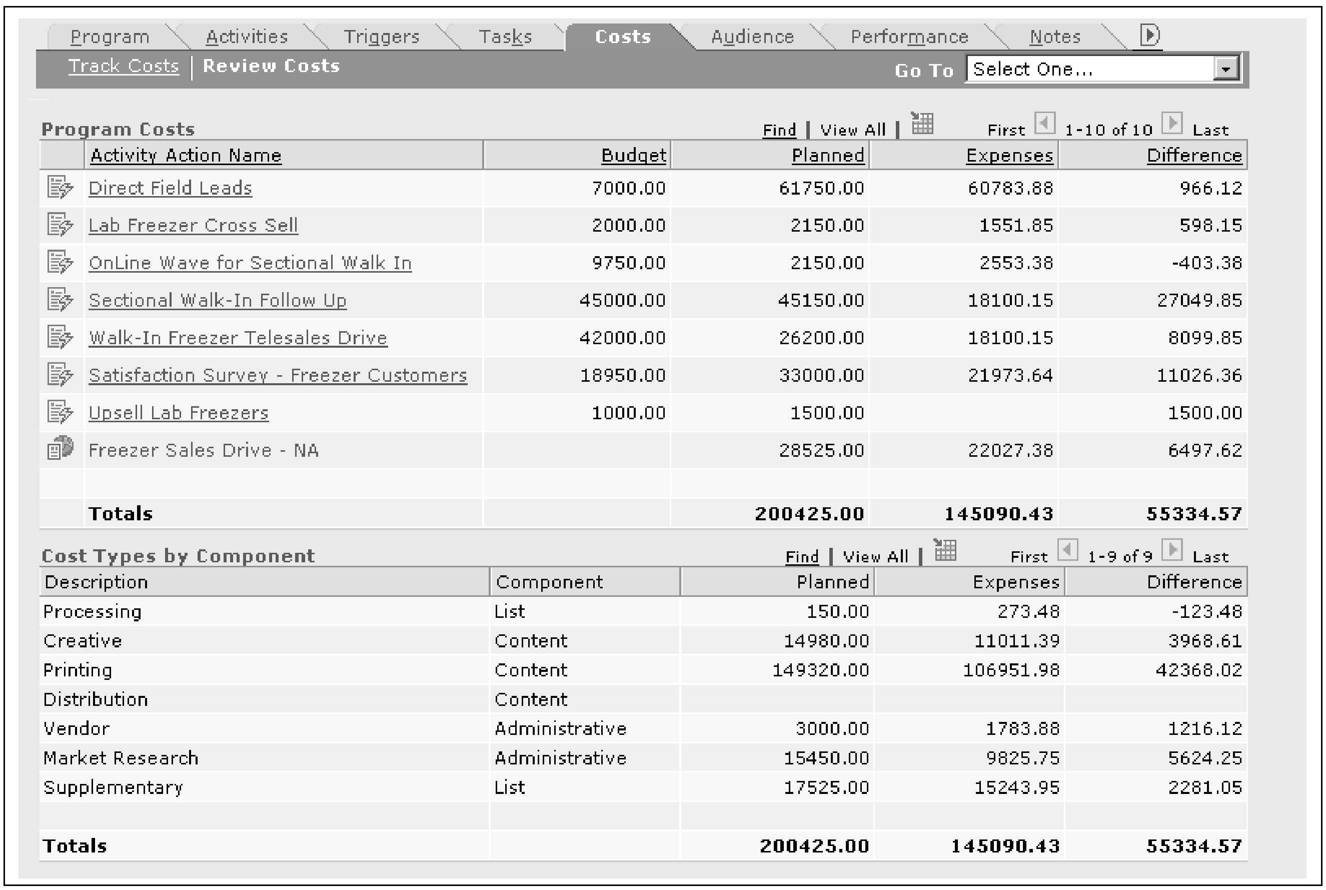
Access the Marketing Programs - Costs page.




| *Cost Type | Components | Variable | Unit Cost | Planned Cost | Actual Cost |
|---|---|---|---|---|---|
| Market Research | Administrative | Variable | | 11000.00 | 6783.43 |
| Supplementary | List | Fixed | | 17525.00 | 15243.95 |
| **Totals** | | | | 28525.00 | 22027.38 |



Marketing Programs - Costs page (1 of 2)




| Activity Action Name | Budget | Planned | Expenses | Difference |
|---|---|---|---|---|
| Direct Field Leads | 7000.00 | 61750.00 | 60783.88 | 966.12 |
| Lab Freezer Cross Sell | 2000.00 | 2150.00 | 1551.85 | 598.15 |
| OnLine Wave for Sectional Walk In | 9750.00 | 2150.00 | 2553.38 | -403.38 |
| Sectional Walk-In Follow Up | 45000.00 | 45150.00 | 18100.15 | 27049.85 |
| Walk-In Freezer Telesales Drive | 42000.00 | 26200.00 | 18100.15 | 8099.85 |
| Satisfaction Survey - Freezer Customers | 18950.00 | 33000.00 | 21973.64 | 11026.36 |
| Upsell Lab Freezers | 1000.00 | 1500.00 | | 1500.00 |
| Freezer Sales Drive - NA | | 28525.00 | 22027.38 | 6497.62 |
| | | | | |
| **Totals** | | **200425.00** | **145090.43** | **55334.57** |



| Description | Component | Planned | Expenses | Difference |
|---|---|---|---|---|
| Processing | List | 150.00 | 273.48 | -123.48 |
| Creative | Content | 14980.00 | 11011.39 | 3968.61 |
| Printing | Content | 149320.00 | 106951.98 | 42368.02 |
| Distribution | Content | | | |
| Vendor | Administrative | 3000.00 | 1783.88 | 1216.12 |
| Market Research | Administrative | 15450.00 | 9825.75 | 5624.25 |
| Supplementary | List | 17525.00 | 15243.95 | 2281.05 |
| | | | | |
| **Totals** | | **200425.00** | **145090.43** | **55334.57** |

Marketing Programs - Costs page (2 of 2)

The Marketing Program - Costs page enables you to keep a record of costs not associated with any other component. In other words, costs that relate to the campaign as a whole.

---

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

---

**Cost Type** Select the cost type description that uniquely identifies the main purpose of the expense.

**Components** Displays the category to which the cost belongs.

**Variable** Displays whether the cost type is defined as variable or fixed.

**Unit Cost** Enter the cost of one unit of the product or service to be measured in this cost metric.

**Note.** This field is available only when the cost type is Variable.

**Planned Cost** Enter the amount that you expect to pay for all units of the product or service to be measured in this cost metric.

**Actual Cost** Enter the amount that you actually pay for all units of the product or service measured in this cost metric.

**Totals** The sums of all planned costs and all actual costs.

**Calculate** Click to calculate total values.

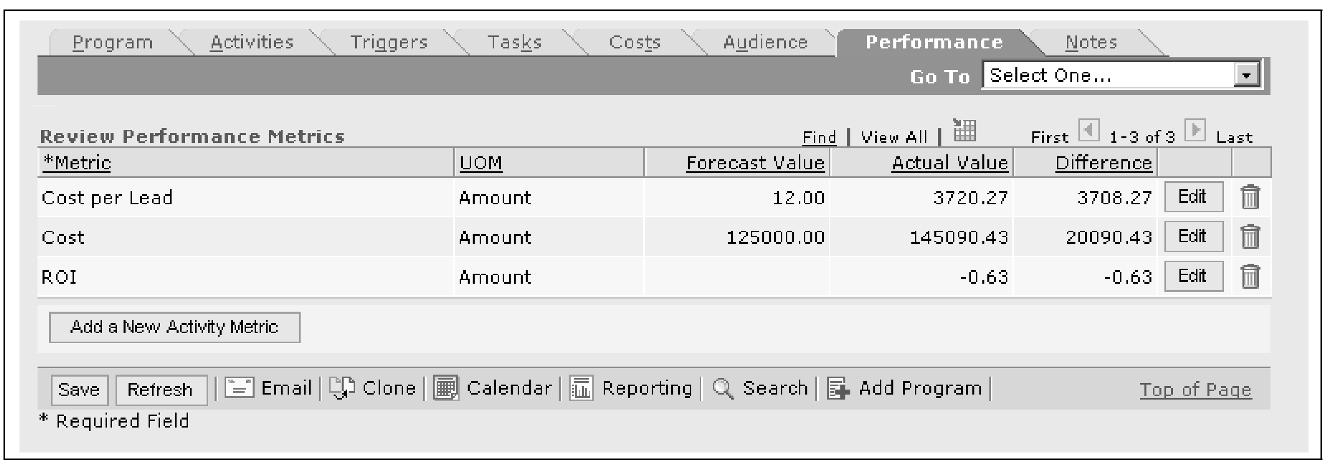
**Add a New Cost** Click to add a new cost.

### Reviewing Costs

The Campaign - Costs - Review All Costs page displays summary information about all costs associated with a campaign. Costs are summarized by the activity and campaign, and by cost types.

## Measuring Campaign Effectiveness

Access the Marketing Programs - Performance page.




Marketing Programs - Performance Metrics page

### Review Campaign Performance Metrics

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

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

**Metric** Select the desired to measure campaign performance.

| | |
|---|---|
| **UOM** (unit of measure) | Displays the unit of measure associated with the selected metric. |
| **Forecast Value** | Enter the result that you expect. |
| **Actual Value** | Displays the actual result. This field is populated with data from various tables and sometimes from multiple applications (such as PeopleSoft Sales and PeopleSoft Telemarketing). |
| **Difference** | Displays the difference between the forecast and actual values. |
| **Edit** or **View** | Click the Edit button to edit an existing metric. Click the View button to return the display to the view mode. |

**Note.** Only one metric can be edited at a time. No metric changes are effective until the page is saved.

| | |
|---|---|
| **Delete** | Click the button to delete an existing metric. |
| **Add a New Activity Metric** | Click to add a new metric to the existing list. |

## Using Campaign Notes

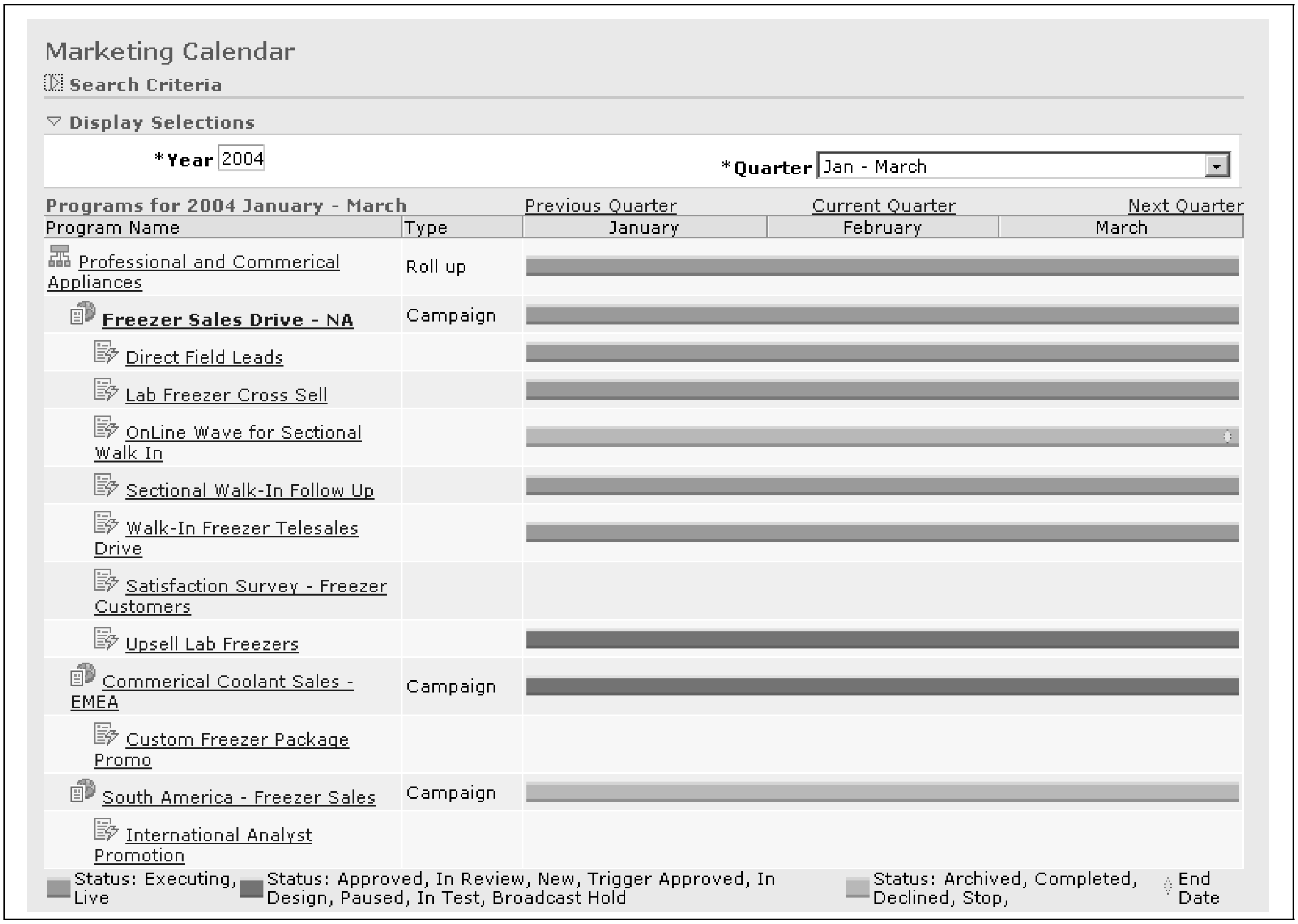
Access the Marketing Programs - Notes page.

Use the Marketing Programs - Notes page to view existing notes and attachments, to email notes, or to add new notes.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

## Viewing the Marketing Calendar

Access the Marketing Calendar page.




Marketing Calendar page

The Marketing Calendar page displays the status and schedule relationship of all campaigns and activities that meet the search criteria you define (Business Unit, Year, and Quarter are required). Schedules are displayed graphically, showing the start and end dates of the campaign at the each level of the hierarchy: Rollup, campaign or dialog, and activity. Campaigns within a rollup campaign are displayed relative to the parent campaign and activities within each child campaign are displayed relative to the child campaign.

# Creating Sales Leads and Telemarketing Prospects

PeopleSoft Marketing enables you to create leads for PeopleSoft Sales or PeopleSoft Telemarketing. You have the option to create leads either automatically or manually. The automatic process is delivered enabled with the system and generates leads whenever certain conditions are present. The manual process is available at any point.

In this section, we discuss how to:

- Generate sales or telemarketing leads automatically.
- Manually generate sales or telemarketing leads.
- View a generated audience.
- Confirm results of the creation process.

## Pages Used to Create Sales and Telemarketing Leads

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Create Leads | RA_CREATE_LEADS | Marketing, Execution, Manual Leads Creation | Turn campaign audiences into sales or telemarketing leads. |
| View Activity Audience | RA_VIEW_WAVE_LIST | Click on the View Audience button on the Create Leads page. | View the created audience. |
| Leads Creation Status | RA_CREATE_LEAD_STA | • Click on the View Results button on the Create Leads page.<br>• Marketing, Execution, Lead Creation Status | Confirm results of the creation process. |

## Automatically Generating Sales or Telemarketing Leads

PeopleSoft Marketing is delivered with an Active Analytics Framework term that automatically generates leads from a campaign activity audience for PeopleSoft Sales and PeopleSoft Telemarketing. The term (Marketing Auto List Load)is delivered enabled and can be disabled if you choose. To disable the term:

1. Go to Enterprise Components, Active Analytics Framework, Policies, Manage Policies.
2. On the search page, select Marketing Campaign for the Context Name and click Search.
3. Click on Marketing Auto List Load for the desired SetID.

**Note.** In some cases, the term is named CSS: Marketing Auto List Load.

4. Click the Modify System Data button.

**Note.** If the term has already been modified from its delivered version, this button will not appear.

5. Click the Redesign button.
6. Click Edit Actions.
7. Change the status of one or both actions (Process and Auto Generation Started) to Inactive.
8. Click Done and then click Save.

Leads are automatically generated when the channel execution value on the marketing channel definition is set to either sales or telemarketing, and the status of a campaign activity moves from approved (APPR) to executing (EXEC). Leads are produced for PeopleSoft Sales when the channel execution is value is set to sales, and for PeopleSoft Telemarketing when the value is telemarketing. No messages are displayed regarding the lead generation.

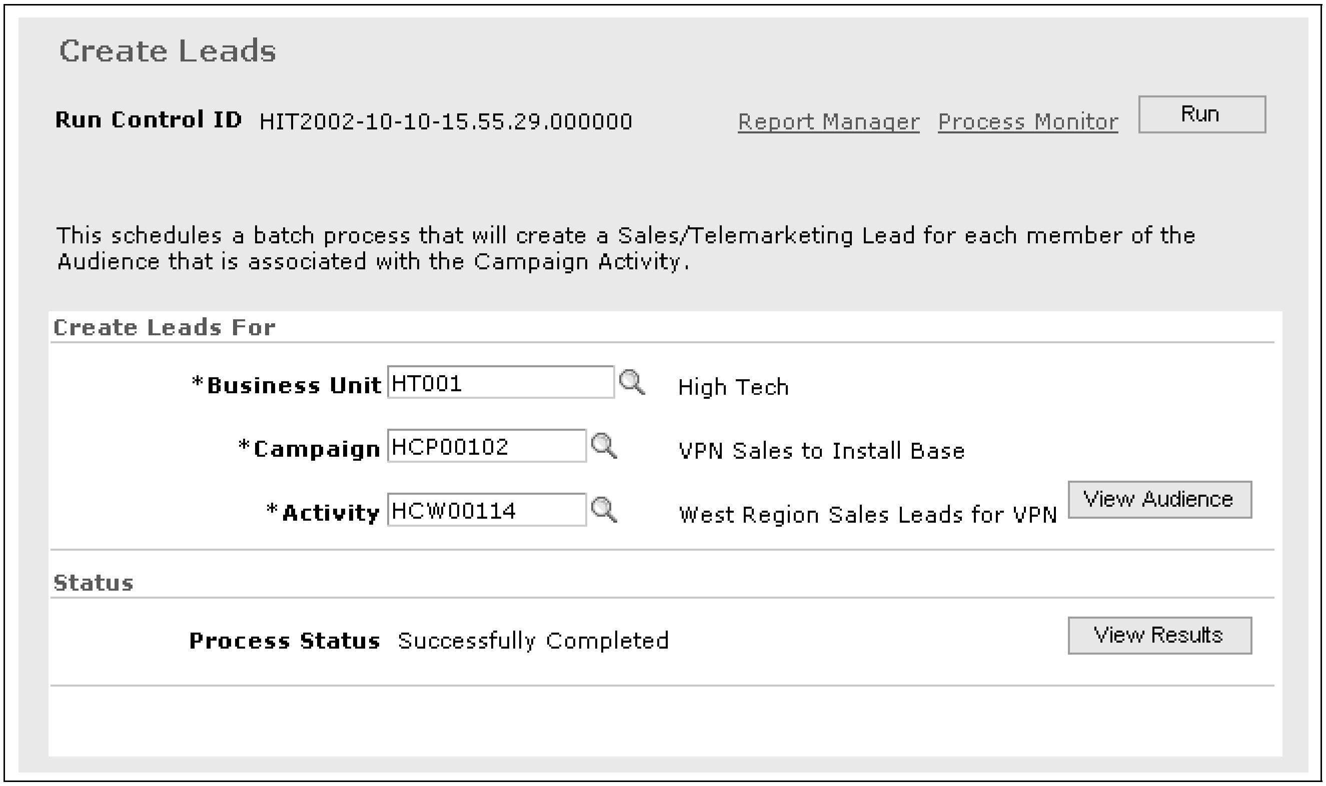
### See Also

Chapter 9, “Creating Campaigns and Activities,” Defining Activities, page 122

*PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”

## Manually Generating Sales or Telemarketing Leads

Access the Create Leads page.




Create Leads page

### Create Leads For

**Business Unit** Select the business unit within which the campaign resides.

**Campaign** Select the campaign within which the activity resides.

**Activity** Select the activity.

---

**Note.** The system exports only those audiences that have the status *Committed*.

---

**View Audience** Click to access the View Activity Audience page, where you can verify the audience.

---

**Note.** While all audience entries appear, entries that have been deleted or are part of a Control Group are not used to create sales leads or prospects.

---

**Run** Click to run this request. PeopleSoft Process Scheduler runs the Create Sales Leads/Prospects process at user-defined intervals.

### Status

**Process Status** Displays the status of the process. Values are: Not Yet Processed, Successfully Completed, or Completed With Errors.

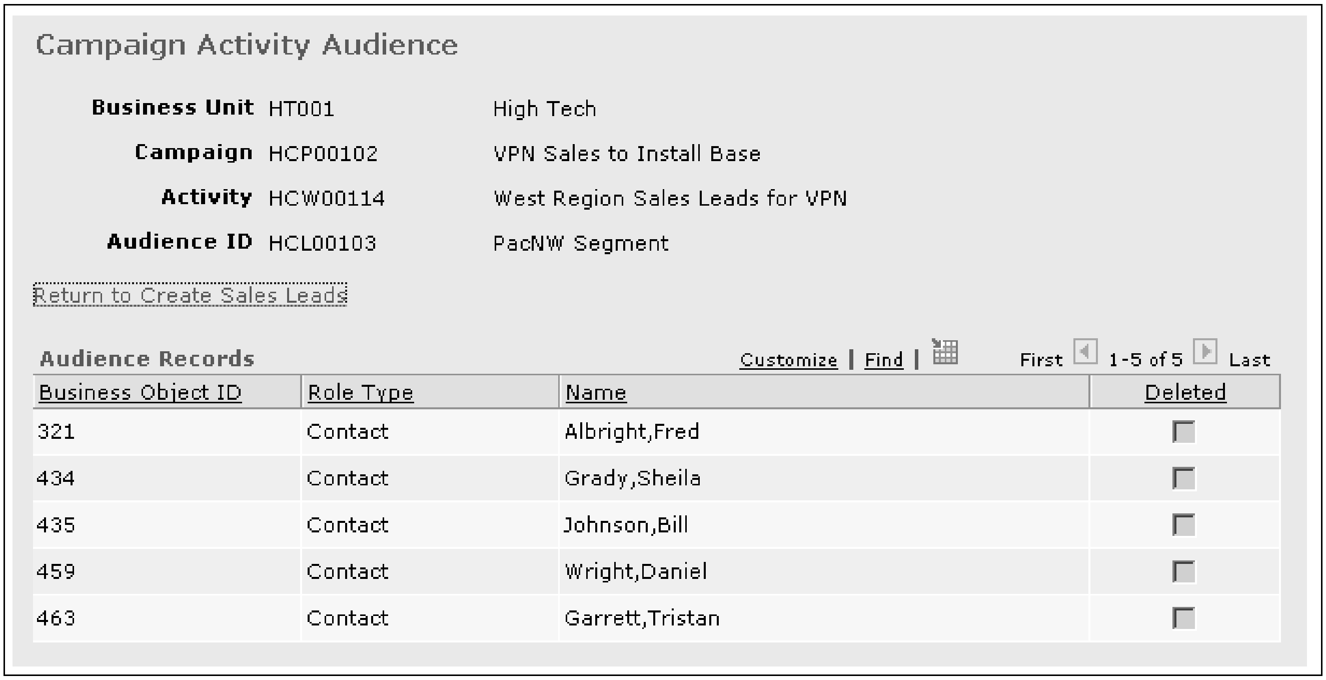
**View Results** Click to access the Leads Creation Status page, where you can view the process results.

**Note.** This button is enabled upon completion of the process.

## Viewing a Generated Audience

Access the Campaign Activity Audience page.

The Campaign Activity Audience page enables you to see the actual results of a generated audience.



Campaign Activity Audience

**Business Unit** HT001 High Tech

**Campaign** HCP00102 VPN Sales to Install Base

**Activity** HCW00114 West Region Sales Leads for VPN

**Audience ID** HCL00103 PacNW Segment

Return to Create Sales Leads

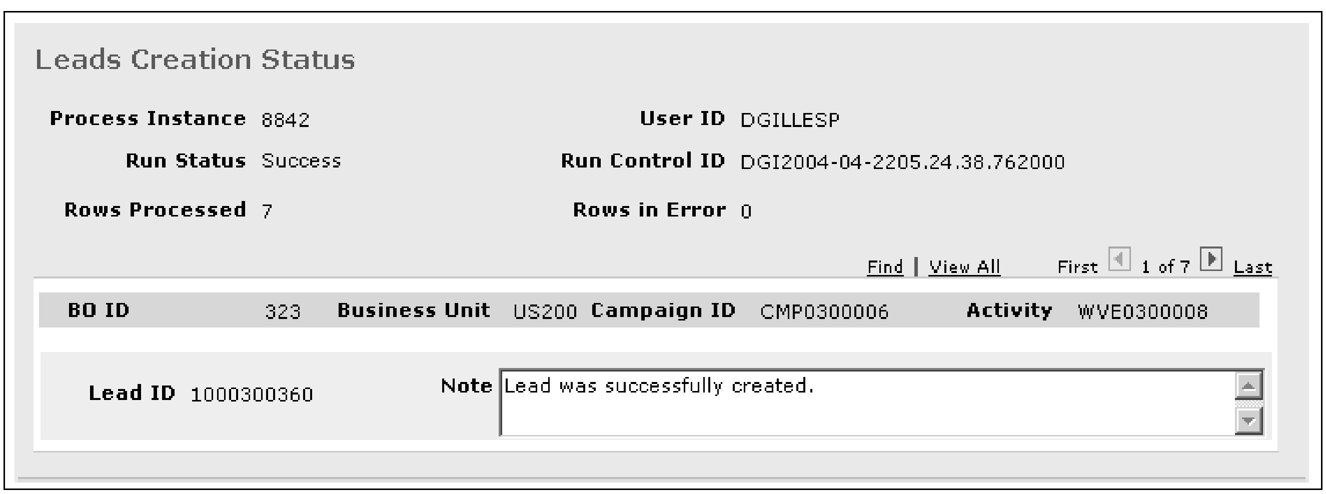
Audience Records Customize | Find | First 1-5 of 5 Last

| Business Object ID | Role Type | Name | Deleted |
|---|---|---|---|
| 321 | Contact | Albright,Fred | |
| 434 | Contact | Grady,Sheila | |
| 435 | Contact | Johnson,Bill | |
| 459 | Contact | Wright,Daniel | |
| 463 | Contact | Garrett,Tristan | |

Campaign Activity Audience page

## Confirming Results of the Creation Process

Access the Leads Creation Status page.



Leads Creation Status

**Process Instance** 8842 **User ID** DGILLESP

**Run Status** Success **Run Control ID** DGI2004-04-2205.24.38.762000

**Rows Processed** 7 **Rows in Error** 0

Find | View All First 1 of 7 Last

**BO ID** 323 **Business Unit** US200 **Campaign ID** CMP0300006 **Activity** WVE0300008

**Lead ID** 1000300360 **Note** Lead was successfully created.

Leads Creation Status page

The Leads Creation Status page displays detailed information about the results of the Create Leads process.

| | |
|---|---|
| **Note** | Displays notes related to the process. If there are errors in the process, a message might appear for each error. |

CHAPTER 10

# Using PeopleSoft Telemarketing

This chapter provides an overview of PeopleSoft Telemarketing and discusses how to:

- Manage telemarketing.
- Process prospects and responses.

## Understanding PeopleSoft Telemarketing

Compared to broadcast, print, or direct mail campaign channels, telemarketing offers the advantage of trained agents talking person-to-person with prospects. Agents can present more information through telemarketing than through other media, as well as answer prospect questions. Additionally, the telemarketing agent can ask for and complete a sale.

PeopleSoft Telemarketing provides powerful tools for both telemarketing managers and agents, plus seamless integration to PeopleSoft Sales and PeopleSoft Order Capture.

PeopleSoft Telemarketing enables telemarketing managers to view details about telemarketing campaign activities and telemarketing agents or teams. Managers can assign individual agents or complete teams to campaigns. By setting up automatic callback rules, managers can define how many times each prospect is available to callers and how often the prospect name appears in the caller queue.

PeopleSoft Telemarketing enables telemarketing agents to access call prospects, activate scripts, and record call results within one component. Activity, offer, and product information is available on convenient tabs, and 360-Degree View functionality provides agents with access to all stored information about the customer.

In addition to facilitating the telemarketing contact, PeopleSoft Telemarketing provides three options for closing the sale. For product offers that can be closed with one phone call, you can transfer prospects who want to place an order to an order capture agent, or the telemarketing agent can capture the order personally. For more complicated products that rely on the telemarketing call to qualify with a follow-up sales call, PeopleSoft Telemarketing can be configured to automatically transfer qualified prospects to the PeopleSoft Sales application. Each of these options depend on the integration method selected as part of the activity definition.

***Warning!*** To ensure that all telemarketing prospects have a telephone number, include it as part of the audience selection criteria.

## Managing Telemarketing

This section discusses how to:

- View executing telemarketing campaign activities.

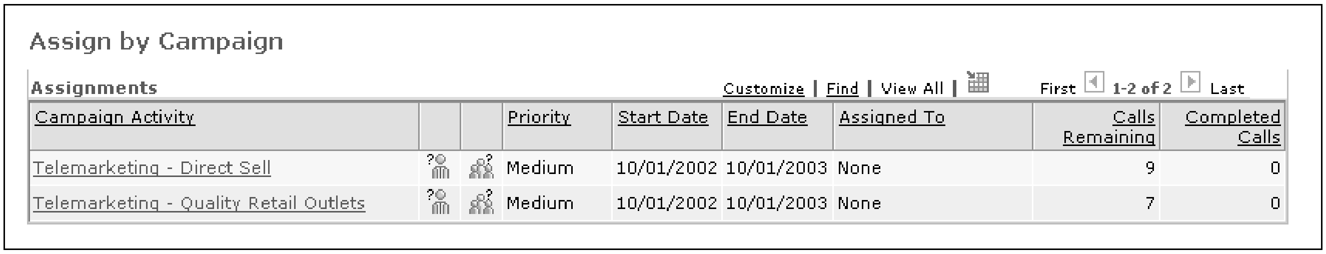
- Link an agent to a campaign activity.
- Link a team to a campaign activity.
- Edit the campaign audience.
- View all teams under a setID.
- Link a campaign activity to a telemarketing team.
- Define rules for automatic callback.

## Pages Used to Manage Telemarketing

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Assign By Campaign | RT_MGR_CMPGN_SMRY | Telemarketing, Manage Telemarketers, Assign by Campaign | View executing telemarketing campaign activities under a business unit. |
| Assign by Campaign - Assign Agents to Campaign | RT_MGR_CMP_AGT_SEL | Telemarketing, Manage Telemarketers, Assign by Campaign<br>Click the Assign Agent button on the Assign by Campaign page. | Link individual agents to a campaign activity and establish schedules. |
| Assign by Campaign - Assign Resources to Campaign | RT_MGR_CMPGN_DTL | Telemarketing, Manage Telemarketers, Assign by Campaign<br>Click the Assign Team button on the Assign By Campaign page. | Link a team to a campaign activity. |
| Manage Telemarketing - Edit Campaign Audience | RT_MGR_CMPGN_LIST | Telemarketing, Manage Telemarketers, Assign by Campaign<br>Click the Assign Team button on the Assign By Campaign page.<br>Click the Edit Campaign Audience button on the Assign Resources to Campaign page. | Remove prospects from a campaign audience. |
| Assign By Team | RT_MGR_TEAM_SMRY | Telemarketing, Manage Telemarketers, Assign by Team/Agent | View all teams assigned to campaigns under a setID. |
| Assign by Team - Assign Campaigns To Team | RT_MGR_TEAM_DTL | Telemarketing, Manage Telemarketers, Assign by Team/Agent<br>Click a team name link on the Assign by Team page. | Link a campaign activity to a telemarketing team. |
| CallBack Times | RT_OM_CALLBACKS | Telemarketing, Manage Telemarketers, Call Back Times | Define rules for automatic callback for telemarketing campaigns and activities. |

## Viewing Executing Telemarketing Campaign Activities

Access the Assign By Campaign page.


Assign by Campaign

Assignments — Customize | Find | View All | First 1-2 of 2 Last

| Campaign Activity | | | Priority | Start Date | End Date | Assigned To | Calls Remaining | Completed Calls |
|---|---|---|---|---|---|---|---|---|
| Telemarketing - Direct Sell | | | Medium | 10/01/2002 | 10/01/2003 | None | 9 | 0 |
| Telemarketing - Quality Retail Outlets | | | Medium | 10/01/2002 | 10/01/2003 | None | 7 | 0 |

Assign by Campaign page

The page displays all executing campaign activities successfully pushed from PeopleSoft Marketing. Click a campaign activity name to access the Marketing Programs - Activity page.

Click the Assign Agent button to access the Assign Agents to Campaign page and assign individual agents to campaigns.

Click the Assign Team button to access the Assign Resources to Campaign page and assign telemarketing teams to campaigns.

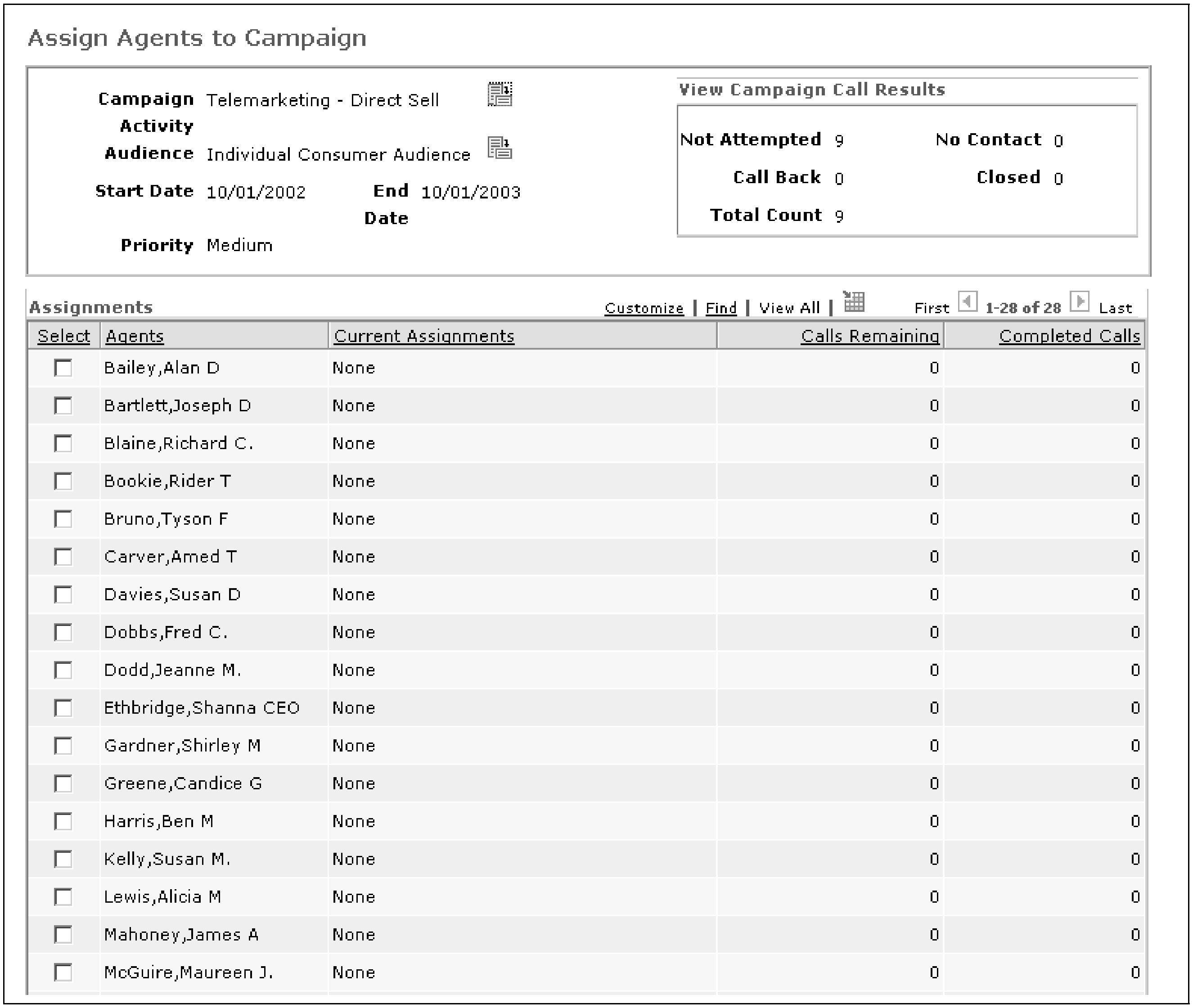
---

**Note.** Agents who are assigned to a campaign activity as part of a team are simultaneously assigned as an individual agent if viewed via the Assign Agent button. This functionality is also useful for assigning a full team plus additional agents, or for assigning a full team and then removing a few people.

---

## Linking an Agent to a Campaign Activity

Access the Assign by Campaign - Assign Agents to Campaign page.



Assign Agents to Campaign

**Campaign Activity** Telemarketing - Direct Sell

**Audience** Individual Consumer Audience

**Start Date** 10/01/2002 **End Date** 10/01/2003

**Priority** Medium

**View Campaign Call Results**

**Not Attempted** 9 **No Contact** 0

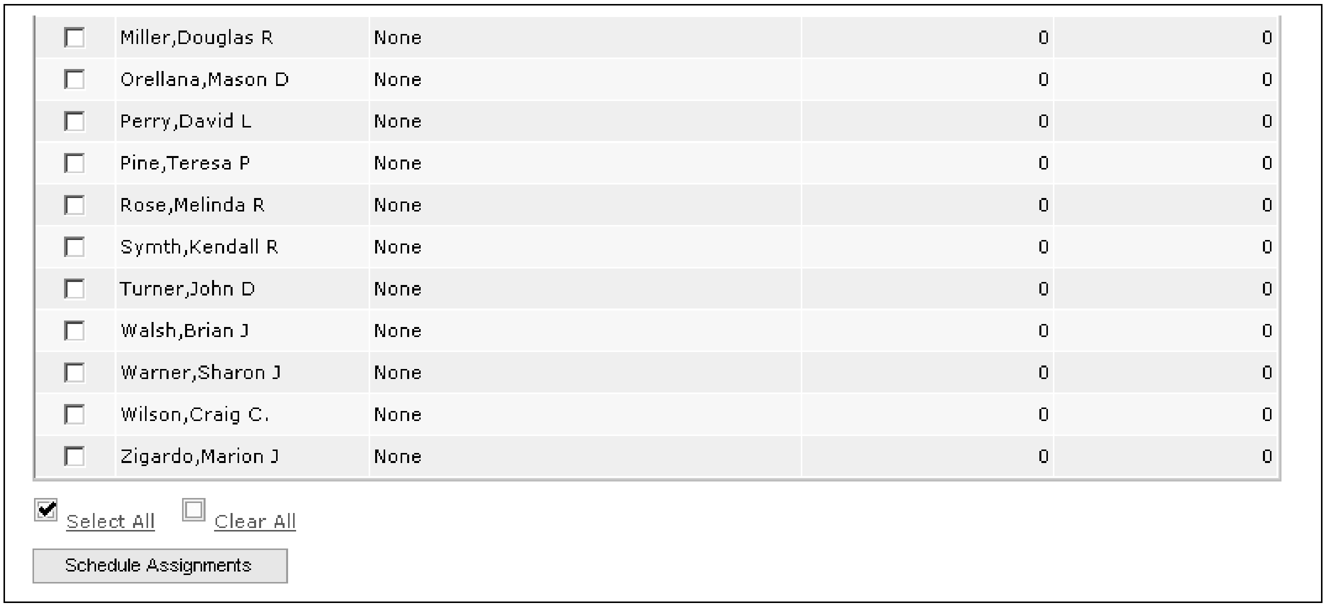
**Call Back** 0 **Closed** 0

**Total Count** 9

**Assignments** Customize | Find | View All | First 1-28 of 28 Last

| Select | Agents | Current Assignments | Calls Remaining | Completed Calls |
|---|---|---|---|---|
| ☐ | Bailey,Alan D | None | 0 | 0 |
| ☐ | Bartlett,Joseph D | None | 0 | 0 |
| ☐ | Blaine,Richard C. | None | 0 | 0 |
| ☐ | Bookie,Rider T | None | 0 | 0 |
| ☐ | Bruno,Tyson F | None | 0 | 0 |
| ☐ | Carver,Amed T | None | 0 | 0 |
| ☐ | Davies,Susan D | None | 0 | 0 |
| ☐ | Dobbs,Fred C. | None | 0 | 0 |
| ☐ | Dodd,Jeanne M. | None | 0 | 0 |
| ☐ | Ethbridge,Shanna CEO | None | 0 | 0 |
| ☐ | Gardner,Shirley M | None | 0 | 0 |
| ☐ | Greene,Candice G | None | 0 | 0 |
| ☐ | Harris,Ben M | None | 0 | 0 |
| ☐ | Kelly,Susan M. | None | 0 | 0 |
| ☐ | Lewis,Alicia M | None | 0 | 0 |
| ☐ | Mahoney,James A | None | 0 | 0 |
| ☐ | McGuire,Maureen J. | None | 0 | 0 |

Assign by Campaign - Assign Agents to Campaign page (1 of 2)



| | | | | |
|---|---|---|---|---|
| ☐ | Miller,Douglas R | None | 0 | 0 |
| ☐ | Orellana,Mason D | None | 0 | 0 |
| ☐ | Perry,David L | None | 0 | 0 |
| ☐ | Pine,Teresa P | None | 0 | 0 |
| ☐ | Rose,Melinda R | None | 0 | 0 |
| ☐ | Symth,Kendall R | None | 0 | 0 |
| ☐ | Turner,John D | None | 0 | 0 |
| ☐ | Walsh,Brian J | None | 0 | 0 |
| ☐ | Warner,Sharon J | None | 0 | 0 |
| ☐ | Wilson,Craig C. | None | 0 | 0 |
| ☐ | Zigardo,Marion J | None | 0 | 0 |



Assign by Campaign - Assign Agents to Campaign page (2 of 2)

View summary information about available agents and select agents for assignment to the campaign.

Click the Campaign Activity button to access the Marketing Programs - Activities page to view details about the campaign activity.

Click the Edit Campaign Audience button to access the Edit Campaign Audience page and filter the list display and remove prospects from the target audience.

## View Campaign Call Results

This group box displays the current status of telemarketing calls for the selected campaign activity.

## Assign Resources

This scroll area displays all telemarketing agents with their current assignments and the status of their calls.

**Select** Select the check box beside an agent name to assign the agent to the new campaign activity. Assigning an agent makes call prospects available to the agent.

**Select All** Click to assign all agents to the campaign activity.

**Clear All** Click to remove all agents from the campaign activity.

**Schedule Assignments** Click to change the display of the Assign Resources scroll area. The new display enables you to establish specific work schedules for individual agents. Only selected agents are displayed and eligible for scheduling.

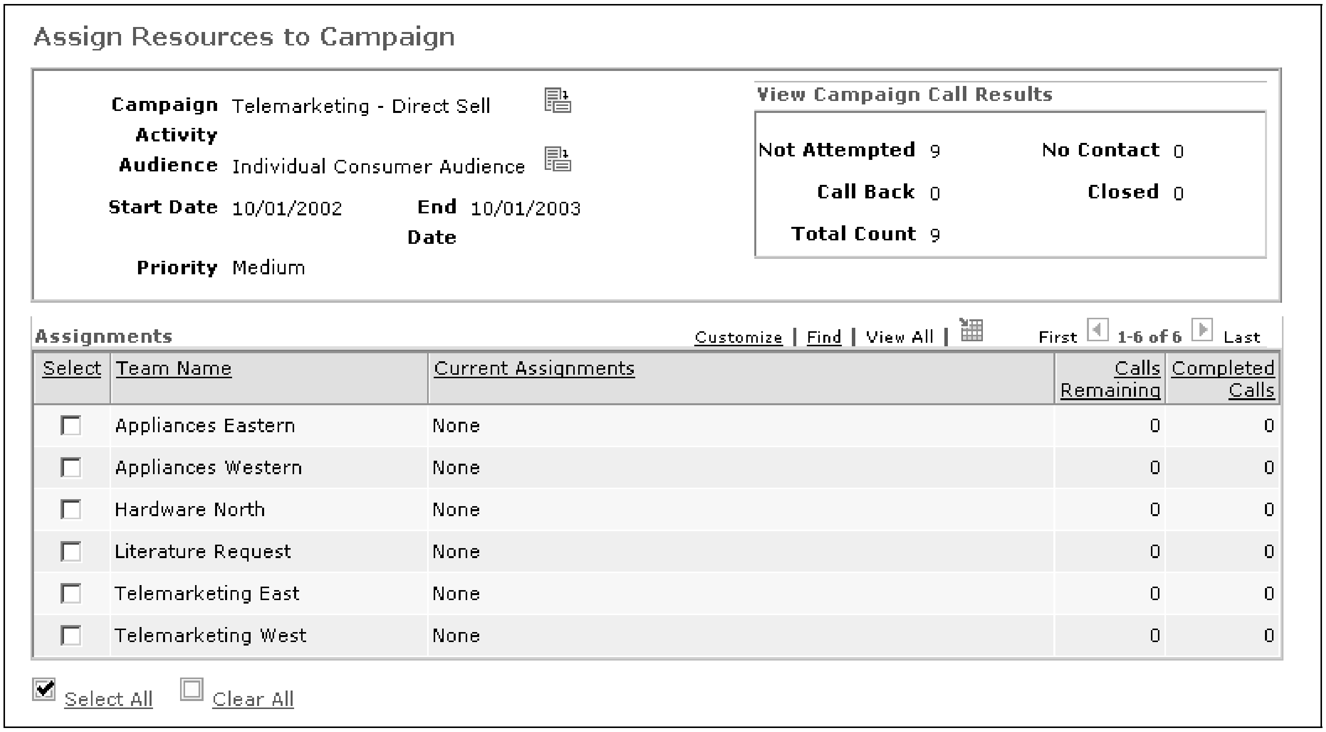
By establishing a work schedule for agents, you control when they can work prospects by assigning start and end dates and times. Agents with assigned schedules only have access to prospects during their assigned dates and times. All assigned dates and times are validated by the system to fit within the overall parameters of the campaign activity.

When you establish a schedule for an agent originally assigned to the campaign as part of a team, the system changes the assignment status to *Assigned by Agent.* Assignment schedules are not effective until you click the Schedule Assignments button again or click the Save button.

**View All Agents** Click to return the page display to the default view, which lists all agents.

## Linking a Team to a Campaign Activity

Access the Assign by Campaign - Assign Resources to Campaign page.




Assign by Campaign - Assign Resources to Campaign page

View summary information about telemarketing teams and select teams for assignment to the campaign.

 Click the Campaign Activity button to access the Marketing Programs - Activities page.

 Click the Edit Campaign Audience button to access the Edit Campaign Audience page and filter the audience display and remove prospects.

### View Campaign Call Results

This group box displays the current status of telemarketing calls for the selected campaign activity.

### Assign Resources

This scroll area displays all marketing teams with their current assignments and the status of their calls.

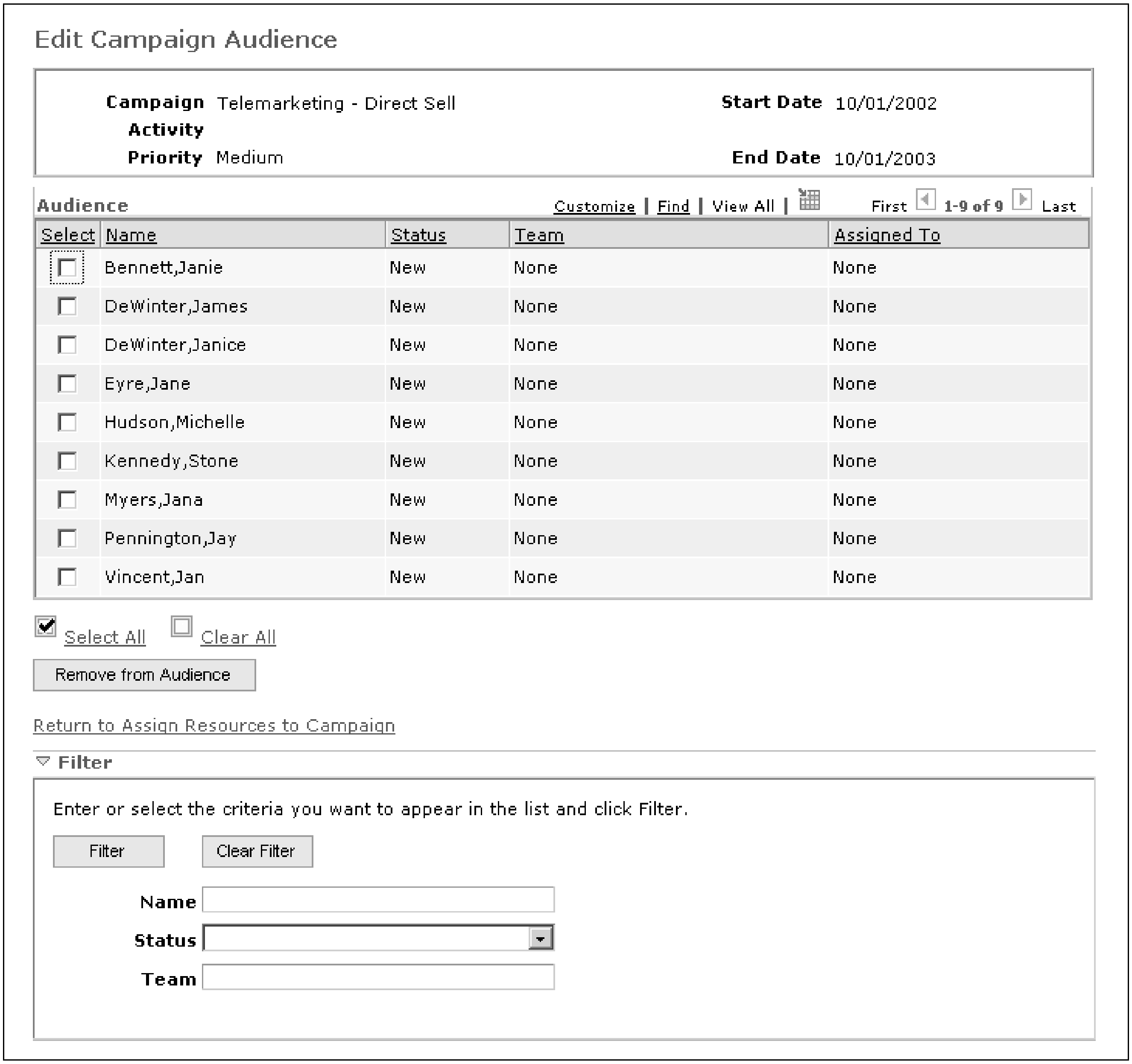
**Select** Select the check box beside a team name to assign the team to the campaign activity. Assigning a team makes call prospects available to team members.

**Select All** Click to assign all teams to the campaign activity.

**Clear All** Click to clear all selections.

## Editing the Campaign Audience

Access the Manage Telemarketing - Edit Campaign Audience page.




Manage Telemarketing - Edit Campaign Audiences page

Remove prospects from the calling list.

### Prospects

**Select** Select the check box beside a prospect name to identify the record for removal from the list.

**Select All** Click to select all prospects for removal from the calling list.

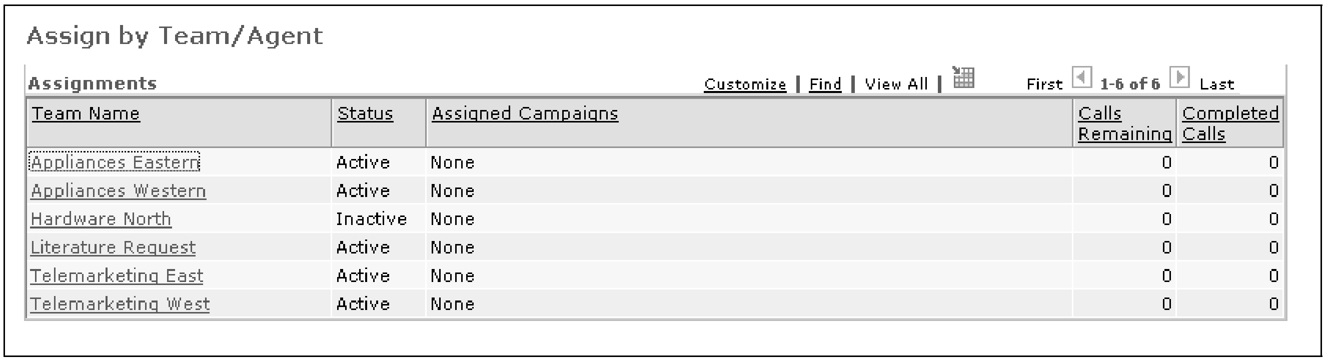
| | |
|---|---|
| **Clear All** | Click to clear all selected records. |
| **Remove from List** | Click to remove all selected records from the list. |

### Filter

Use the Filter region to limit the display of prospects. Enter a filter value in one or more of the available fields and click the Filter button.

## View All Teams Under a SetID

Access the Assign By Team/Agent page.


Assign by Team/Agent

Assignments — Customize | Find | View All | First 1-6 of 6 Last

| Team Name | Status | Assigned Campaigns | Calls Remaining | Completed Calls |
|---|---|---|---|---|
| Appliances Eastern | Active | None | 0 | 0 |
| Appliances Western | Active | None | 0 | 0 |
| Hardware North | Inactive | None | 0 | 0 |
| Literature Request | Active | None | 0 | 0 |
| Telemarketing East | Active | None | 0 | 0 |
| Telemarketing West | Active | None | 0 | 0 |

Assign by Team/Agent page

View summary information about all available telemarketing teams.

| | |
|---|---|
| **Team Name** | Click to access the Assign Campaign to Team page and link a campaign activity to the team. |

## Linking a Campaign Activity to a Telemarketing Team

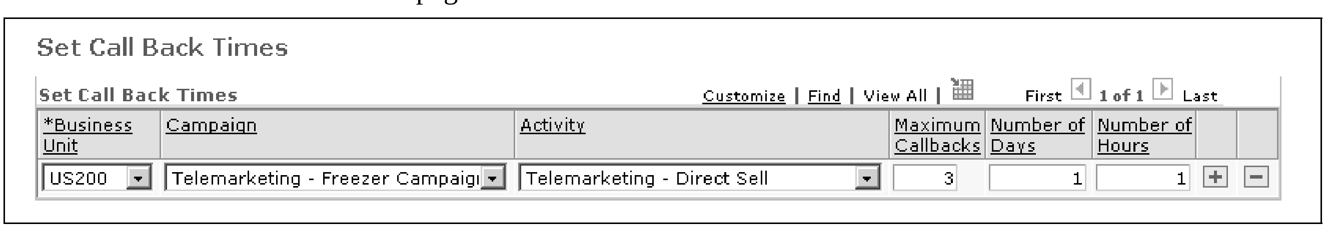
Access the Assign Campaigns To Team page.

The Assign Campaigns region displays all current campaign activities, the priority, teams currently assigned to the activity, and calls remaining.

| | |
|---|---|
| **Select** | Select the check box beside a campaign activity to assign a campaign team. |
| **Select All** | Click to assign the team to all campaign activities. |
| **Clear All** | Click to remove the team from all campaign activities. |

## Defining Rules for Automatic Callback

Access the Set Call Back Times page.


Set Call Back Times

Set Call Back Times — Customize | Find | View All | First 1 of 1 Last

| *Business Unit | Campaign | Activity | Maximum Callbacks | Number of Days | Number of Hours |
|---|---|---|---|---|---|
| US200 | Telemarketing - Freezer Campaig | Telemarketing - Direct Sell | 3 | 1 | 1 |

Set Call Back Times page

Automatic callback rules define when and how often prospects return to the caller queue. Tailor callback rules by any combination of business unit, campaign, or activity.

**Business Unit** Select the campaign's business unit.

**Campaign** Select the campaign for which you want to define callback times.

**Activity** Select the activity for which you want to define callback times. You can define different callback rules for each activity within a campaign.

**Number Callbacks Allowed** Specify the number of callbacks allowed for this campaign and activity. Enter zero to allow no callbacks. Enter 99 to allow unlimited callbacks.

**Add Number of Days** Specify the number of days until the prospect is available for a callback. Leave the field blank if the callback is to be within the same day.

**Add Number of Hours** Specify the number of hours until the prospect is available for a callback. Leave the field blank to make the callback at the same time of day. You can only add hours in full hour increments. You can use Add Number of Days and Add Number of Hours together. For example, to call the prospect the next day, but one hour later, enter *1* in the Add Number of Days field and *1* in the Add Number of Hours field.

# Processing Prospects and Responses

This section discusses how to:

- View executing telemarketing campaigns.
- Contact prospects.
- Enter responses received through channels other than telemarketing.

### See Also

Chapter 9, "Creating Campaigns and Activities," Defining Activities, page 122

## Pages Used to Process Prospects and Responses

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Telemarketing | RT_AGT_CMPGN_SMRY | Telemarketing, Call Prospects | View current telemarketing campaigns. |
| Call Prospects | RT_AGT_CALL_PRSPT | • Telemarketing, Call Prospects<br>Click the Campaign Activity link on the Telemarketing page.<br>• Telemarketing, Record Responses<br>Click the Prospect link on the Find An Existing Prospect page. | Enter responses to marketing contacts. |
| Activity Details | RT_AGT_CMPGN_DTL | Telemarketing, Call Prospects, Activity Details | Telemarketing agents can view general information about a telemarketing campaign activity, including the products offered and offer details. |
| Product Info (product information) | RT_AGT_PROD_INFO | Telemarketing, Call Prospects, Product Info | Telemarketing agents can view detailed information about the offered product. |
| Find an Existing Prospect | RT_OM_MANUAL_SRCH | Telemarketing, Record Responses | View all prospects from all active campaign activities. |

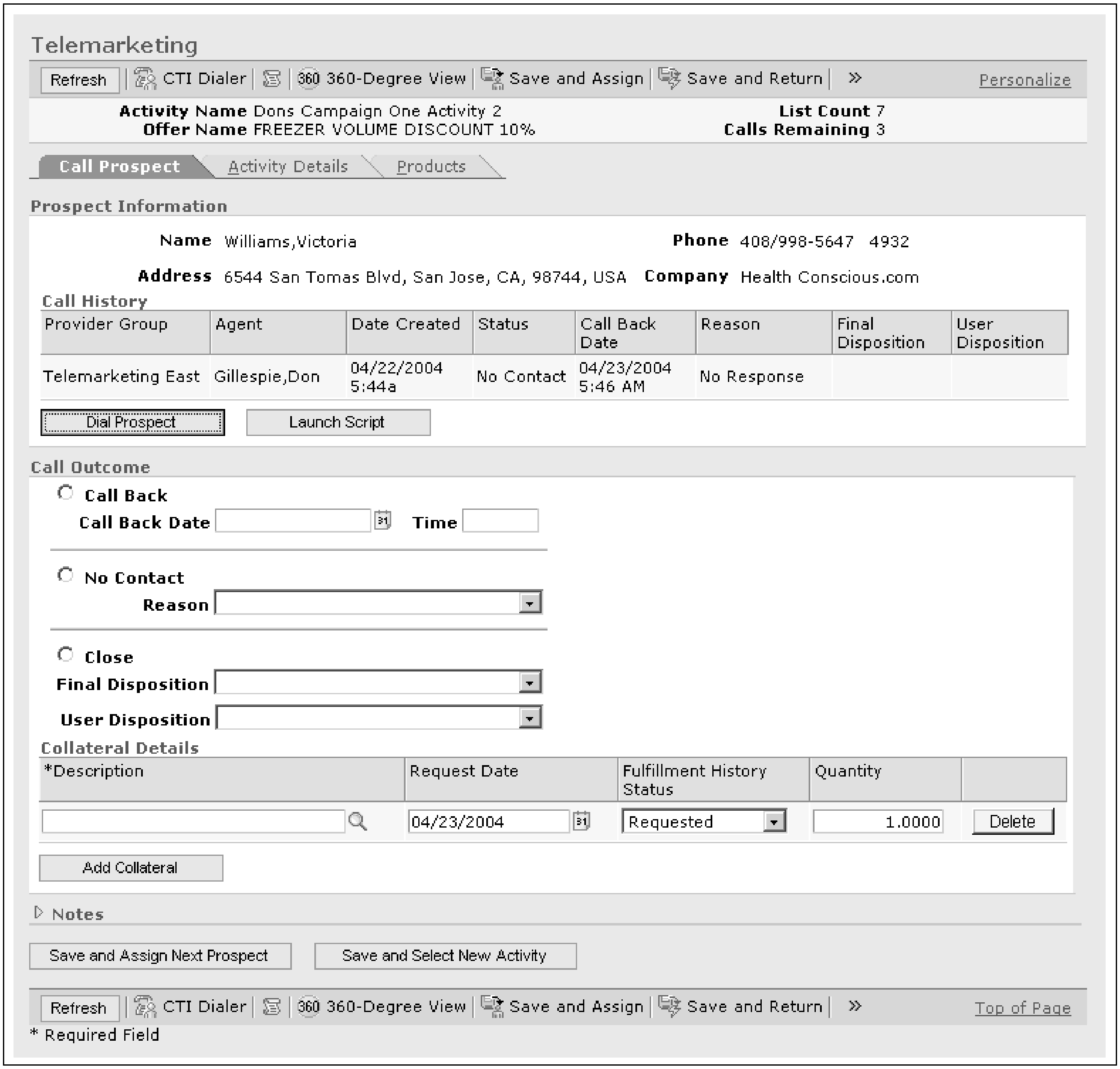
## Viewing Executing Telemarketing Campaigns

Access the Telemarketing page.

Click a campaign activity name to access the Call Prospects page.

## Contacting Prospects

Access the Call Prospect page.



Call Prospect page

**Note.** As agents prepare to make the first contact of a new campaign, they should refer to the Activity Details and Products pages to familiarize themselves with the offer and product before placing a call.

The Call Prospect header area displays the activity and offer names, total list count, and the number of calls remaining. Check to confirm that this is the correct activity and offer.

**Assign the First Prospect**

As agents enter the Call Prospect page for the first time, the Assign the First Prospect button appears. Click the button to populate information about the first prospect in the call list.

## Prospect Information

The Prospect Information group box displays the name, the address, the company name (if the prospect is a company contact), and the prospect's telephone number. The Call History scroll area displays information related to previous calls for this campaign.

---

**Note.** The actual fields and buttons displayed depend on the integration method selected on the Campaign - Activities page.

---

**Dial Prospect**

Click to automatically dial the prospect.

> **Note.** The Dial Prospect button only works when a CTI (computer telephony interface) system is in use.

**Launch Script**

Click to launch the script linked to this campaign activity.

**Order Now**

Click to access the PeopleSoft Order Capture Entry Form page and enter order details. This button only appears when the integration method selected on the Campaign - Activities detail page is set to *Order Capture Direct* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Send to Order Capture Agent**

Click to transfer gathered information to an order capture agent. This inserts a worklist item and sends notification to order capture agents using workflow processing. The telemarketing contact is completed, and the order capture agent completes the order. This button only appears when the integration method selected on the Campaign - Activities detail page is set to *Order Capture Indirect* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Script Name**

Displays the name of the script used for the telemarketing call.

**Score**

Displays the score achieved by the prospect's answers to script questions. This field only appears when the integration method selected on the Campaign - Activities detail page is set to *Sales Leads* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Lead Rating**

The value of this field is automatically determined based on the score of the prospect's response to the script questions. You can override the value. Lead Rating values are defined in the PeopleSoft Sales application setup. The values *Cold, Hot,* and *Warm* are delivered with the system. This field only appears when the integration method selected on the Campaign - Activities detail page is set to *Sales Leads* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Rating Category**

The value of this field is automatically determined based on the score of the prospect's response to the script questions. You can override the value. Values are *Qualified* and *Unqualified.* This field only appears when the integration method selected on the Campaign - Activities detail page is set to *Sales Leads* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

## Call Outcome

Use options in the Call Outcome group box to record results of this call.

**Call Back Date**

Select to specify a particular time to call back. Enter the date and time.

---

**Note.** Enter a callback date and time only when requested by the contact. Otherwise, the automatic callback rules return the contact to the caller queue according to the defined rule.

---

**No Contact** Select to indicate that the call has not been completed to the named contact. Select a reason from the available options. Values are: *No Response, Not Available,* and *Wrong Number.*Selecting *No Response* results in the call being placed back in the call queue.

**Close** Select to indicate that the call has been completed. Select a reason from the available options. Values displayed depend on the integration method selected for the activity and include *Do Not Call Again, Generate Lead, Not Interested, Pass to Order Capture, Sale, Send Email,* and *Send Mail.*

---

**Note.** Selecting *Do Not Call Again* places a flag on the prospect's record in the Business Contact table, to prevent future contact through any marketing channel.

---

**Disposition** Select a disposition reason from the available options. Disposition reasons are user-defined under the Telemarketing Set Up menu.

### Collateral Details

Use the Collateral Details scroll area to enter collateral materials requested by the call prospect.

---

**Note.** A request for collateral completes a call. You cannot send collateral and assign a callback.

---

**Description** Select one of the available collateral items.

**Request Date** Enter the date that the fulfillment product is requested. This is typically the day that the call is closed.

**Fulfillment History Status** Enter the status of the product fulfillment. Values are: *Back Order, Cancelled, Partial, Requested* (default value), and *Shipped.*

**Quantity** Enter the fulfillment product quantity requested. The default value is *1.0000.*

### Notes

The Notes group box displays any notes that have been attached to the campaign activity.

### See Also

*PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* "Defining Scripts"

## Entering Responses Received Through Channels Other Than Telemarketing

Access the Find an existing Prospect page.

**Find an existing Prospect**

Prospect(s) Customize | Find | View 100 | First 1-15 of 124 Last

| Prospect | Wave Name | Address | City | State | Postal Code | Customer |
|---|---|---|---|---|---|---|
| Garrett,Tristan | Campaign KC Wave 2 | | | | | 105 |
| Louie,John | Campaign KC Wave 2 | | | | | 120 |
| Guerra,John | Campaign KC Wave 2 | | | | | 121 |
| Lee,Jimmy | Campaign KC Wave 2 | | | | | 121 |
| Louie,John | Campaign KC Wave 2 | | | | | 122 |
| Ridley,Peter | Campaign KC Wave 2 | | | | | 123 |
| Kinney,Brad | Campaign KC Wave 2 | | | | | 124 |
| Moore,Jason | Campaign KC Wave 2 | | | | | 124 |
| Setzer,Zane | Campaign KC Wave 2 | | | | | 124 |
| Pensing,Ray | Campaign KC Wave 2 | | | | | 125 |
| Chance,Billy | Campaign KC Wave 2 | | | | | 131 |
| Garrett,Tristan | Campaign KC Wave 2 | | | | | 133 |
| Brian,Patrick | Campaign KC Wave 3 | | | | | 141 |
| Benedict,Francine | Campaign KC Wave 3 | | | | | 225 |
| Kennedy,Stone | KC Campaign Regression Wave 1 | | | | | 14031 |

Find an existing Prospect page

To consolidate responses from campaign activities utilizing channels other than telemarketing, PeopleSoft Telemarketing enables agents to record responses without actually contacting the prospect by telephone. For example, a campaign might employ both telemarketing and direct mail activities. Responses from the direct mail activity are entered into the system manually using the Record Responses component.

Clicking a prospect name takes you to the Call Prospect component, where you enter response information in the Call Outcome area.

See Chapter 10, “Using PeopleSoft Telemarketing,” Contacting Prospects, page 155.

# APPENDIX A

# Using Interactive Reports in PeopleSoft Marketing Applications

This chapter provides an overview of interactive reports and discusses how to:

- Use interactive reports for PeopleSoft Marketing.
- Use interactive reports for PeopleSoft Telemarketing.

## Understanding Interactive Reports

Interactive reports are a dynamic, interactive, high-level implementation of PeopleTools Business Analysis Modeler (BAM). These reports do not require an analytic logic server or a separate database to store data. You can save results by exporting them to Microsoft Excel, or you can print them.

With interactive reports, you can view transactional data in multidimensional online reports. To determine how information is displayed, drag dimension options onto the report grid. Data can be further filtered by selecting a single value for any dimension option.

For example, using the Campaign Performance Forecast Analysis interactive report, you can analyze campaign performance for all campaigns, for a single campaign, for all campaigns and all activities, for a single campaign and all activities, or for a single campaign and a single activity, among other options. Some interactive reports also enable you to perform what-if scenarios.

While interactive reports are interactive, the communication between interactive reports and the PeopleSoft CRM database is one-way. The changes that you make on an interactive report do not affect data in the database. Interactive reports appear in separate windows. You cannot transfer from an interactive report to a component to access data. In PeopleSoft Marketing, user roles and access profiles control access to forecasts and thereby to interactive reports.

PeopleSoft marketing applications provides six interactive reports:

- Campaign Performance Forecast Analysis (PeopleSoft Marketing).
- Dialog Performance Forecast Analysis (PeopleSoft Marketing)
- Lead Acceptance (PeopleSoft Telemarketing).
- Lead Quality (PeopleSoft Telemarketing).
- Sales Effectiveness (PeopleSoft Telemarketing).
- Sales Conversion Rate (PeopleSoft Telemarketing).

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**Note.** You must have Microsoft Internet Explorer 5.1 or higher to access interactive reports.

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### See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Using Interactive Reports”

# Using Interactive Reports for PeopleSoft Marketing

This section discusses how to:

- View key performance measurements.
- Perform what-if scenarios.
- Establish assumptions.

## Page Used to Use Interactive Reports for PeopleSoft Marketing

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Campaign Performance / Forecast Analysis | RA_WHATIF_UPD | Marketing, Interactive Reports, Campaign Performance Forecast<br><br>or<br><br>Click the Reporting button in the Marketing Toolbar | View key measurements, perform what-if scenarios, and establish assumptions for marketing campaigns. |
| Dialog Performance / Forecast Analysis | RY_DIALOG_IR_ADD | Marketing, Interactive Reports, Dialog Performance Forecast | View key measurements, perform what-if scenarios, and establish assumptions for online dialogs. |

## Viewing Key Campaign Performance Measurements

Access the Campaign Performance Analysis page.

View key measurements of campaign performance in one report. By changing the dimensions, you can view results from various angles.

### Results Measured

The page measures:

- Audience size.
- Number of leads.
- Number of opportunities.
- Number of customers.
- Response rate.
- Conversion rate.
- Campaign cost.
- Gross revenue.

- Gross profit.

### Available Dimensions

Results can be measured by:

- Rollup
- Campaign.
- Activity.

## Performing What-If Scenarios

Access the Campaign Forecasting Analysis page.

Perform what-if scenarios using actual and projected campaign results. You can create and save multiple scenarios to test different assumptions.

### Results Measured

The Campaign Forecasting Analysis page measures actual performance against projected results for:

- Audience size.
- Projected audience size.
- Response rate.
- Projected response rate.
- Conversion rate.
- Projected conversion rate.
- Projected number of leads.
- Projected number of customers.
- Projected total cost.
- Projected revenue.
- Projected profit.

### Available Dimensions

Results can be projected by:

- Campaign.
- Activity.

## Establishing Assumptions

Access the Assumptions page.

Establish values for three factors:

- Unit campaign cost.
- Unit acquisition cost.
- Revenue per customer.

These values are used to project costs and revenues relative to real or projected results.

# Viewing Dialog Performance Measurements

Access the Dialog Performance/Forecast Analysis page.

View key measurements of dialog performance in one report. By changing the dimensions, you can view results from various angles.

The report has two tabs: Reach and Response

## Results Measured

The Reach page measures:

- Audience count.
- Projected count.
- Bounces.
- Percent bounces.
- Projected percent bounces.
- Projected bounced.
- Reach delivered.
- Reach projected delivered.
- Clickthrough.
- CTR.
- Projected CTR.
- Projected respondents.

The Response page measures:

- Response count.
- Projected response count.
- Visits.
- Visitors.
- Projected visitors.
- Percent response.
- Projected percent response.
- Submitters.
- Projected submitters.
- Percent submitters.
- Projected percent submitters.
- Percent complete.

### Available Dimensions

Results can be projected by:

- Activity (Action)
- Audience

# Using Interactive Reports for PeopleSoft Telemarketing

This section discusses how to:

- View lead status.
- Evaluate lead quality.
- Measure script completion.
- Measure completed sales.

## Pages Used to Use PeopleSoft Telemarketing Interactive Reports

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Lead Acceptance | RT_LEAD_ACCEPT_UPD | Telemarketing, Interactive Reports, Lead Acceptance | See if leads have been accepted or rejected. |
| Lead Quality | RT_LEAD_QUAL_UPD | Telemarketing, Interactive Reports, Lead Quality | Compare telemarketing agent and sales representative lead quality ratings. |
| Sales Effectiveness | RT_SALES_EFFEC_UPD | Telemarketing, Interactive Reports, Sales Effectiveness | Determine if telemarketing agents are completing their scripts. |
| Sales Conversion Rate | RT_SALES_CONV_UPD | Telemarketing, Interactive Reports, Sales Conversion Rate | View completed sales for prospects transferred to order capture. |

## Viewing Lead Status

Access the Lead Acceptance page.

View how many of the leads that have been passed from telemarketing agents to sales representatives have been accepted or rejected, and how many are yet to be acted upon.

### Results Measured

The Lead Acceptance interactive report measures:

- Leads passed from telemarketing to sales.
- Leads accepted by sales representatives.
- Leads rejected by sales representatives.

- Leads pending (not yet accepted or rejected).
- Percent of passed leads accepted.
- Percent of passed leads rejected.
- Percent of passed leads pending.

### Available Dimensions

Results can be measured by:

- Campaign.
- Activity.
- Telemarketing territory.
- Telemarketing team.
- Telemarketing agent.
- Week.

## Evaluating Lead Quality

Access the Lead Quality page.

Compare the quality rating of a lead as determined by the telemarketing agent with the rating determined by a sales representative. This enables you to determine if there are discrepancies between the lead quality ratings given by telemarketers versus those of sales representatives. By analyzing results using different dimensions, you can identify problems at any level.

The report does not reveal if leads are over or under rated, but only that there are differences.

### Results Measured

The Lead Quality interactive report measures:

- Leads passed from telemarketing to sales
- Leads the lead quality rating determined by the telemarketing agent matches that of the sales representative.
- Percentage of passed leads were the lead quality rating matches.

### Available Dimensions

Results can be measured by:

- Campaign.
- Activity.
- Telemarketing territory.
- Telemarketing team.
- Telemarketing agent.
- Sales representative.
- Week.
- If the lead has been accepted or rejected by the sales representative.

# Measuring Script Completion

Access the Sales Effectiveness page.

Determine if telemarketing agents are able to complete scripts during their telemarketing calls. The report measures script completion for closed calls only.

## Results Measured

The Sales Effectiveness interactive report measures:

- Closed prospects.
- Percent of closed calls with scripts completed.
- Percent of closed calls with scripts partially completed.
- Percent closed calls with scripts not started.

## Available Dimensions

Results can be measured by:

- Campaign.
- Activity.
- Telemarketing team.
- Telemarketing agent.
- Week.

# Measuring Completed Sales

Access the Sales Conversion page.

View how many prospects transferred to order capture actually result in completed sales. The report only analyzes calls from telemarketing activities where the activity integration method is set to order capture direct or order capture indirect. Results are not measured until the call has been closed by the telemarketing agent.

## Results Measured

The Sales Conversion interactive report measures:

- Closed prospects.
- Percent sale completed.
- Percent pending sale (sale not yet completed).
- Percent no sale.

## Available Dimensions

Results can be measured by:

- Campaign.
- Activity.
- Telemarketing team.
- Telemarketing agent.

- Week.

APPENDIX B

# PeopleSoft Marketing Reports

This appendix provides an overview of PeopleSoft Marketing reports.

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**Note.** For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with the documentation.

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### See Also

*Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*

*Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications*

## PeopleSoft Marketing Reports: A to Z

The following PeopleSoft Marketing reports are delivered predefined with the system:

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|---|---|---|
| RAC1000<br>Campaign Effectiveness | Use this report to view and evaluate leads generated by marketing campaigns over a specified period. | Marketing, Operational Reports, Campaign Effectiveness | RUN_RAC1000 |
| RAC1001<br>Activity Effectiveness | Use this report to view and evaluate leads generated by marketing campaign activities. | Marketing, Operational Reports, Activity Effectiveness | RUN_RAC1001 |
| RAC1002<br>Campaign and Activity Effectiveness | Combined Campaign and Activity effectiveness report. | Marketing, Operational Reports, Campaign and Activity Effectiveness | RUN_RAC1002 |
| RAC1003<br>Campaign Count by Score | This report is a frequency report displaying percentage, number of people scripted and the score of the script by Campaign / Activity. | Marketing, Operational Reports, Campaign Count by Score | RUN_RAC1003 |

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|---|---|---|
| RAC2000<br>Task Management | This report shows all the Tasks irrespective of whether they are Campaign Tasks or Content Tasks. Using the report parameters you may obtain a list of Tasks a) for a particular Campaign b) for a Particular Content c) All Campaign and Content Tasks | Marketing, Operational Reports, Task Management | RUN_RA2000 |
| RAC7000<br>Campaign ROI (return on investment) | This report compares the actual revenue generated by a particular activity over its actual cost. A negative ROI indicates costs exceed revenues. The report is grouped by Rollup Campaigns, Campaigns. | Marketing, Operational Reports, Campaign ROI | RUN_RA7000 |
| RAC8000<br>Campaign Expense | This report shows the forecast and actual costs incurred for each campaign activity. The Variance column indicates the deviation of actual over forecast cost. (negative variance indicates you have spent more than forecasted) This report is grouped by Campaign within Rollup Campaign. | Marketing, Operational Reports, Campaign Expense | RUN_RA8000 |
| RAC9000<br>Content Management | This report audiences all defined content and audiences quantity and status of each item. The report is grouped by Parent Content. | Marketing, Operational Reports, Content Management | RUN_RA9000 |
| RAC9001<br>Campaign-Content Management | This report audiences all defined content for a particular campaign activity. The report is grouped by Campaign and Parent Content. | Marketing, Operational Reports, Campaign Content Management | RUN_RA9001 |
| RAC10000<br>Campaign Management | This report shows audiences all campaigns and activities under a Rollup Campaign. | Marketing, Operational Reports, Campaign Management | RUN_RA1000 |
| RUN_RCOM01<br>Campaign Counts | This report shows all counts for a telemarketing campaign. | Telemarketing, Reports, Campaign Counts Report | RUN_RCOM01 |
| RUN_RCOM02<br>Team Counts | This report shows all counts for a telemarketing team. | Telemarketing, Reports, Team Counts Report | RUN_RCOM02 |

# Appendix C

# ISO Country and Currency Codes

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

This appendix discusses:

- ISO country codes.
- ISO currency codes.

### See Also

"About This PeopleBook," Typographical Conventions and Visual Cues

## ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

| ISO Country Code | Country Name |
|---|---|
| ABW | Aruba |
| AFG | Afghanistan |
| AGO | Angola |
| AIA | Anguilla |
| ALB | Albania |
| AND | Andorra |
| ANT | Netherlands Antilles |
| ARE | United Arab Emirates |
| ARG | Argentina |
| ARM | Armenia |
| ASM | American Samoa |
| ATA | Antarctica |

| ISO Country Code | Country Name |
|---|---|
| ATF | French Southern Territories |
| ATG | Antigua and Barbuda |
| AUS | Australia |
| AUT | Austria |
| AZE | Azerbaijan |
| BDI | Burundi |
| BEL | Belgium |
| BEN | Benin |
| BFA | Burkina Faso |
| BGD | Bangladesh |
| BGR | Bulgaria |
| BHR | Bahrain |
| BHS | Bahamas |
| BIH | Bosnia and Herzegovina |
| BLR | Belarus |
| BLZ | Belize |
| BMU | Bermuda |
| BOL | Bolivia |
| BRA | Brazil |
| BRB | Barbados |
| BRN | Brunei Darussalam |
| BTN | Bhutan |
| BVT | Bouvet Island |
| BWA | Botswana |
| CAF | Central African Republic |
| CAN | Canada |
| CCK | Cocos (Keeling) Islands |

| ISO Country Code | Country Name |
|---|---|
| CHE | Switzerland |
| CHL | Chile |
| CHN | China |
| CIV | Cote D'Ivoire |
| CMR | Cameroon |
| COD | Congo, The Democratic Republic |
| COG | Congo |
| COK | Cook Islands |
| COL | Colombia |
| COM | Comoros |
| CPV | Cape Verde |
| CRI | Costa Rica |
| CUB | Cuba |
| CXR | Christmas Island |
| CYM | Cayman Islands |
| CYP | Cyprus |
| CZE | Czech Republic |
| DEU | Germany |
| DJI | Djibouti |
| DMA | Dominica |
| DNK | Denmark |
| DOM | Dominican Republic |
| DZA | Algeria |
| ECU | Ecuador |
| EGY | Egypt |
| ERI | Eritrea |
| ESH | Western Sahara |

| ISO Country Code | Country Name |
|---|---|
| ESP | Spain |
| EST | Estonia |
| ETH | Ethiopia |
| FIN | Finland |
| FJI | Fiji |
| FLK | Falkland Islands (Malvinas) |
| FRA | France |
| FRO | Faroe Islands |
| FSM | Micronesia, Federated States |
| GAB | Gabon |
| GBR | United Kingdom |
| GEO | Georgia |
| GHA | Ghana |
| GIB | Gibraltar |
| GIN | Guinea |
| GLP | Guadeloupe |
| GMB | Gambia |
| GNB | Guinea-Bissau |
| GNQ | Equatorial Guinea |
| GRC | Greece |
| GRD | Grenada |
| GRL | Greenland |
| GTM | Guatemala |
| GUF | French Guiana |
| GUM | Guam |
| GUY | Guyana |
| GXA | GXA - GP Core Country |

| ISO Country Code | Country Name |
|---|---|
| GXB | GXB - GP Core Country |
| GXC | GXC - GP Core Country |
| GXD | GXD - GP Core Country |
| HKG | Hong Kong |
| HMD | Heard and McDonald Islands |
| HND | Honduras |
| HRV | Croatia |
| HTI | Haiti |
| HUN | Hungary |
| IDN | Indonesia |
| IND | India |
| IOT | British Indian Ocean Territory |
| IRL | Ireland |
| IRN | Iran (Islamic Republic Of) |
| IRQ | Iraq |
| ISL | Iceland |
| ISR | Israel |
| ITA | Italy |
| JAM | Jamaica |
| JOR | Jordan |
| JPN | Japan |
| KAZ | Kazakstan |
| KEN | Kenya |
| KGZ | Kyrgyzstan |
| KHM | Cambodia |
| KIR | Kiribati |
| KNA | Saint Kitts and Nevis |

| ISO Country Code | Country Name |
|---|---|
| KOR | Korea, Republic of |
| KWT | Kuwait |
| LAO | Lao People’s Democratic Rep |
| LBN | Lebanon |
| LBR | Liberia |
| LBY | Libyan Arab Jamahiriya |
| LCA | Saint Lucia |
| LIE | Liechtenstein |
| LKA | Sri Lanka |
| LSO | Lesotho |
| LTU | Lithuania |
| LUX | Luxembourg |
| LVA | Latvia |
| MAC | Macao |
| MAR | Morocco |
| MCO | Monaco |
| MDA | Moldova, Republic of |
| MDG | Madagascar |
| MDV | Maldives |
| MEX | Mexico |
| MHL | Marshall Islands |
| MKD | Fmr Yugoslav Rep of Macedonia |
| MLI | Mali |
| MLT | Malta |
| MMR | Myanmar |
| MNG | Mongolia |
| MNP | Northern Mariana Islands |

| ISO Country Code | Country Name |
|---|---|
| MOZ | Mozambique |
| MRT | Mauritania |
| MSR | Montserrat |
| MTQ | Martinique |
| MUS | Mauritius |
| MWI | Malawi |
| MYS | Malaysia |
| MYT | Mayotte |
| NAM | Namibia |
| NCL | New Caledonia |
| NER | Niger |
| NFK | Norfolk Island |
| NGA | Nigeria |
| NIC | Nicaragua |
| NIU | Niue |
| NLD | Netherlands |
| NOR | Norway |
| NPL | Nepal |
| NRU | Nauru |
| NZL | New Zealand |
| OMN | Oman |
| PAK | Pakistan |
| PAN | Panama |
| PCN | Pitcairn |
| PER | Peru |
| PHL | Philippines |
| PLW | Palau |

| ISO Country Code | Country Name |
|---|---|
| PNG | Papua New Guinea |
| POL | Poland |
| PRI | Puerto Rico |
| PRK | Korea, Democratic People’s Rep |
| PRT | Portugal |
| PRY | Paraguay |
| PSE | Palestinian Territory, Occupie |
| PYF | French Polynesia |
| QAT | Qatar |
| REU | Reunion |
| ROU | Romania |
| RUS | Russian Federation |
| RWA | Rwanda |
| SAU | Saudi Arabia |
| SDN | Sudan |
| SEN | Senegal |
| SGP | Singapore |
| SGS | Sth Georgia & Sth Sandwich Is |
| SHN | Saint Helena |
| SJM | Svalbard and Jan Mayen |
| SLB | Solomon Islands |
| SLE | Sierra Leone |
| SLV | El Salvador |
| SMR | San Marino |
| SOM | Somalia |
| SPM | Saint Pierre and Miquelon |
| STP | Sao Tome and Principe |

| ISO Country Code | Country Name |
| --- | --- |
| SUR | Suriname |
| SVK | Slovakia |
| SVN | Slovenia |
| SWE | Sweden |
| SWZ | Swaziland |
| SYC | Seychelles |
| SYR | Syrian Arab Republic |
| TCA | Turks and Caicos Islands |
| TCD | Chad |
| TGO | Togo |
| THA | Thailand |
| TJK | Tajikistan |
| TKL | Tokelau |
| TKM | Turkmenistan |
| TLS | East Timor |
| TON | Tonga |
| TTO | Trinidad and Tobago |
| TUN | Tunisia |
| TUR | Turkey |
| TUV | Tuvalu |
| TWN | Taiwan, Province of China |
| TZA | Tanzania, United Republic of |
| UGA | Uganda |
| UKR | Ukraine |
| UMI | US Minor Outlying Islands |
| URY | Uruguay |
| USA | United States |

| ISO Country Code | Country Name |
|---|---|
| UZB | Uzbekistan |
| VAT | Holy See (Vatican City State) |
| VCT | St Vincent and the Grenadines |
| VEN | Venezuela |
| VGB | Virgin Islands (British) |
| VIR | Virgin Islands (U.S.) |
| VNM | Viet Nam |
| VUT | Vanuatu |
| WLF | Wallis and Futuna Islands |
| WSM | Samoa |
| YEM | Yemen |
| YUG | Yugoslavia |
| ZAF | South Africa |
| ZMB | Zambia |
| ZWE | Zimbabwe |

# ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

| ISO Currency Code | Description |
|---|---|
| ADP | Andorran Peseta |
| AED | United Arab Emirates Dirham |
| AFA | Afghani |
| AFN | Afghani |
| ALK | Old Lek |
| ALL | Lek |
| AMD | Armenian Dram |

| ISO Currency Code | Description |
|---|---|
| ANG | Netherlands Antilles Guilder |
| AOA | Kwanza |
| AOK | Kwanza |
| AON | New Kwanza |
| AOR | Kwanza Reajustado |
| ARA | Austral |
| ARP | Peso Argentino |
| ARS | Argentine Peso |
| ARY | Peso |
| ATS | Schilling |
| AUD | Australian Dollar |
| AWG | Aruban Guilder |
| AZM | Azerbaijanian Manat |
| BAD | Dinar |
| BAM | Convertible Marks |
| BBD | Barbados Dollar |
| BDT | Taka |
| BEC | Convertible Franc |
| BEF | Belgian Franc |
| BEL | Financial Belgian Franc |
| BGJ | Lev A/52 |
| BGK | Lev A/62 |
| BGL | Lev |
| BGN | Bulgarian LEV |
| BHD | Bahraini Dinar |
| BIF | Burundi Franc |
| BMD | Bermudian Dollar |

| ISO Currency Code | Description |
| --- | --- |
| BND | Brunei Dollar |
| BOB | Boliviano |
| BOP | Peso |
| BOV | Mvdol |
| BRB | Cruzeiro |
| BRC | Cruzado |
| BRE | Cruzeiro |
| BRL | Brazilian Real |
| BRN | New Cruzado |
| BRR | Brazilian Real Dollar |
| BSD | Bahamian Dollar |
| BTN | Ngultrum |
| BUK | N/A |
| BWP | Pula |
| BYB | Belarussian Ruble |
| BYR | Belarussian Ruble |
| BZD | Belize Dollar |
| CAD | Canadian Dollar |
| CDF | Franc Congolais |
| CHF | Swiss Franc |
| CLF | Unidades de fomento |
| CLP | Chilean Peso |
| CNX | Peoples Bank Dollar |
| CNY | Yuan Renminbi |
| COP | Colombian Peso |
| CRC | Costa Rican Colon |
| CSD | Serbia Dinar |

| ISO Currency Code | Description |
|---|---|
| CSJ | Krona A/53 |
| CSK | Koruna |
| CUP | Cuban Peso |
| CVE | Cape Verde Escudo |
| CYP | Cyprus Pound |
| CZK | Czech Koruna |
| DEM | Deutsche Mark |
| DJF | Djibouti Franc |
| DKK | Danish Krone |
| DOP | Dominican Peso |
| DZD | Algerian Dinar |
| ECS | Sucre |
| ECV | Unidad de Valor |
| EEK | Kroon |
| EGP | Egyptian Pound |
| EQE | Ekwele |
| ERN | Nakfa |
| ESA | Spanish Peseta |
| ESB | Convertible Peseta |
| ESP | Spanish Peseta |
| ETB | Ethiopian Birr |
| EUR | euro |
| FIM | Markka |
| FJD | Fiji Dollar |
| FKP | Falklands Isl. Pound |
| FRF | French Franc |
| GBP | Pound Sterling |

| ISO Currency Code | Description |
|---|---|
| GEK | Georgian Coupon |
| GEL | Lari |
| GHC | Cedi |
| GIP | Gibraltar Pound |
| GMD | Dalasi |
| GNE | Syli |
| GNF | Guinea Franc |
| GNS | Syli |
| GQE | Ekwele |
| GRD | Drachma |
| GTQ | Quetzal |
| GWE | Guinea Escudo |
| GWP | Guinea-Bissau Peso |
| GYD | Guyana Dollar |
| HKD | Hong Kong Dollar |
| HNL | Lempira |
| HRD | Dinar |
| HRK | Kuna |
| HTG | Gourde |
| HUF | Forint |
| IDR | Rupiah |
| IEP | Irish Pound |
| ILP | Pound |
| ILR | Old Shekel |
| ILS | New Israeli Sheqel |
| INR | Indian Rupee |
| IQD | Iraqi Dinar |

| ISO Currency Code | Description |
|---|---|
| IRR | Iranian Rial |
| ISJ | Old Krona |
| ISK | Iceland Krona |
| ITL | Italian Lira |
| JMD | Jamaican Dollar |
| JOD | Jordanian Dinar |
| JPY | Yen |
| KES | Kenyan Shilling |
| KGS | Som |
| KHR | Riel |
| KMF | Comoro Franc |
| KPW | North Korean Won |
| KRW | Won |
| KWD | Kuwaiti Dinar |
| KYD | Cayman Islands dollar |
| KZT | Tenge |
| LAJ | Kip Pot Pol |
| LAK | Kip |
| LBP | Lebanese Pound |
| LKR | Sri Lanka Rupee |
| LRD | Liberian Dollar |
| LSL | Loti |
| LSM | Maloti |
| LTL | Lithuanian Litas |
| LTT | Talonas |
| LUC | Convertib Francl |
| LUF | Luxembourg Franc |

| ISO Currency Code | Description |
| --- | --- |
| LUL | Financial Franc |
| LVL | Latvian Lats |
| LVR | Latvian Ruble |
| LYD | Libyan Dinar |
| MAD | Moroccan Dirham |
| MAF | Mali Franc |
| MDL | Moldovan Leu |
| MGF | Malagasy Franc |
| MKD | Denar |
| MLF | Mali Franc |
| MMK | Kyat |
| MNT | Tugrik |
| MOP | Pataca |
| MRO | Ouguiya |
| MTL | Maltese Lira |
| MTP | Maltese Pound |
| MUR | Mauritius Rupee |
| MVQ | Maldive Rupee |
| MVR | Rufiyaa |
| MWK | Malawian Kwacha |
| MXN | Mexican Peso |
| MXP | Mexican Peso |
| MXV | Mexican UDI |
| MYR | Malaysian Ringgit |
| MZE | Mozambique Escudo |
| MZM | Metical |
| NAD | Namibia Dollar |

| ISO Currency Code | Description |
|---|---|
| NGN | Naira |
| NIC | Cordoba |
| NIO | Cordoba Oro |
| NLG | Netherlands Guilder |
| NOK | Norwegian Krone |
| NPR | Nepalese Rupee |
| NZD | New Zealand Dollar |
| OMR | Rial Omani |
| PAB | Balboa |
| PEI | Inti |
| PEN | Nuevo Sol |
| PES | Sol |
| PGK | Kina |
| PHP | Philippine Peso |
| PKR | Pakistan Rupee |
| PLN | Zloty |
| PLZ | Zloty |
| PTE | Portuguese Escudo |
| PYG | Guarani |
| QAR | Qatari Rial |
| ROK | Leu A/52 |
| ROL | Leu |
| RUB | Russian Ruble |
| RUR | Russian Federation Rouble |
| RWF | Rwanda Franc |
| SAR | Saudi Riyal |
| SBD | Solomon Islands |

| ISO Currency Code | Description |
|---|---|
| SCR | Seychelles Rupee |
| SDD | Sudanese Dinar |
| SDP | Sudanese Pound |
| SEK | Swedish Krona |
| SGD | Singapore Dollar |
| SHP | St Helena Pound |
| SIT | Tolar |
| SKK | Slovak Koruna |
| SLL | Leone |
| SOS | Somali Shilling |
| SRG | Surinam Guilder |
| STD | Dobra |
| SUR | Rouble |
| SVC | El Salvador Colon |
| SYP | Syrian Pound |
| SZL | Lilangeni |
| THB | Baht |
| TJR | Tajik Ruble |
| TJS | Somoni |
| TMM | Manat |
| TND | Tunisian Dinar |
| TOP | Pa’anga |
| TPE | Timor Escudo |
| TRL | Turkish Lira |
| TTD | Trinidad Dollar |
| TWD | New Taiwan Dollar |
| TZS | Tanzanian Shilling |

| ISO Currency Code | Description |
|---|---|
| UAH | Hryvnia |
| UAK | Karbovanet |
| UGS | Uganda Shilling |
| UGW | Old Shilling |
| UGX | Uganda Shilling |
| USD | US Dollar |
| USN | US Dollar (Next day) |
| USS | US Dollar (Same day) |
| UYN | Old Uruguay Peso |
| UYP | Uruguayan Peso |
| UYU | Peso Uruguayo |
| UZS | Uzbekistan Sum |
| VEB | Bolivar |
| VNC | Old Dong |
| VND | Dong |
| VUV | Vatu |
| WST | Tala |
| XAF | CFA Franc BEAC |
| XAG | Silver |
| XAU | GOLD |
| XBA | European Composite Unit |
| XBB | European Monetary Unit |
| XBC | European Unit of Account 9 |
| XBD | European Unit of Account 17 |
| XCD | East Caribbean Dollar |
| XDR | SDR |
| XEU | EU Currency (E.C.U) |

| ISO Currency Code | Description |
|---|---|
| XFO | Gold-Franc |
| XFU | UIC-Franc |
| XOF | CFA Franc BCEAO |
| XPD | Palladium |
| XPF | CFP Franc |
| XPT | Platinum |
| XTS | For Testing Purposes |
| XXX | Non Currency Transaction |
| YDD | Yemeni Din |
| YER | Yemeni Rial |
| YUD | New Yugoslavian Dinar |
| YUM | New Dinar |
| YUN | Yugoslavian Dinar |
| ZAL | Financial Rand |
| ZAR | Rand |
| ZMK | Zambian Kwacha |
| ZRN | New Zaire |
| ZRZ | Zaire |
| ZWC | Rhodesian Dollar |
| ZWD | Zimbabwe Dollar |

# Glossary of PeopleSoft Terms

**absence entitlement** This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

**absence take** This element defines the conditions that must be met before a payee is entitled to take paid time off.

**accounting class** In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

**accounting date** The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

**accounting split** The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

**accumulator** You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

**action reason** The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

**action template** In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

**activity** In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

**agreement** In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

**allocation rule** In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

**alternate account** A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

**AR specialist** Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

**arbitration plan** In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

**assessment rule** In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

**asset class** An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

**attribute/value pair** In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

**authentication server** A server that is set up to verify users of the system.

**base time period** In PeopleSoft Business Planning, the lowest level time period in a calendar.

**benchmark job** In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

**book** In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

**branch** A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

**budgetary account only** An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

**budget check** In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

**budget control** In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

**budget period** The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

**business event** In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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| | In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example). |
| **business unit** | A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions. |
| **buyer** | In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system. |
| **catalog item** | In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities. |
| **catalog map** | In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog. |
| **catalog partner** | In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content. |
| **categorization** | Associates partner offerings with catalog offerings and groups them into enterprise catalog categories. |
| **channel** | In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event. |
| **ChartField** | A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth. |
| **ChartField balancing** | You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction. |
| **ChartField combination edit** | The process of editing journal lines for valid ChartField combinations based on user-defined rules. |
| **ChartKey** | One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination. |
| **checkbook** | In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions. |
| **Class ChartField** | A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.* |
| **clone** | In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change. |
| **collection** | To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object. |

**collection rule** — In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

**compensation object** — In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

**compensation structure** — In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

**condition** — In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

**configuration parameter catalog** — Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

**configuration plan** — In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

**content reference** — Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

**context** — In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

**control table** — Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

**cost profile** — A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

**cost row** — A cost transaction and amount for a set of ChartFields.

**current learning** — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

**data acquisition** — In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

**data elements** — Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

**dataset** — A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

**delivery method**

In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

**delivery method type**

In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

**directory information tree**

In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

**document sequencing**

A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

**dynamic detail tree**

A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

**edit table**

A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

**effective date**

A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

**EIM ledger**

Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

**elimination set**

In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

**entry event**

In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

**equitization**

In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

**event**

A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

**event propagation process**

In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

**exception** — In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

**exclusive pricing** — In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

**fact** — In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

**forecast item** — A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

**fund** — In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

**generic process type** — In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

**group** — In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

**incentive object** — In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

**incentive rule** — In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

**incur** — In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

**item** — In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

**KPI** — An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

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| **LDIF file** | Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data. |
| **learner group** | In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office. |
| **learning components** | In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity. |
| **learning environment** | In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them. |
| **learning history** | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs. |
| **ledger mapping** | You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table. |
| **library section** | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it. |
| **linked section** | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section. |
| **linked variable** | In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable. |
| **load** | In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment. |
| **local functionality** | In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu. |
| **location** | Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address. |
| **logistical task** | In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new |

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

**market template** In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

**match group** In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

**MCF server** Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

**merchandising activity** In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

**meta-SQL** Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

**metastring** Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

**multibook** In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

**multicurrency** The ability to process transactions in a currency other than the business unit's base currency.

**national allowance** In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

**node-oriented tree** A tree that is based on a detail structure, but the detail values are not used.

**pagelet** Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

**participant** In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

**participant object** Each participant object may be related to one or more compensation objects.

See also *compensation object*.

**partner** A company that supplies products or services that are resold or purchased by the enterprise.

**pay cycle** In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

**pending item** In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

**PeopleCode** PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

**PeopleCode event** An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

**PeopleSoft Internet Architecture** The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

**performance measurement** In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

**period context** In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

**plan** In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

**plan context** In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

**plan template** In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

**planned learning** In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner’s planned learning activities and programs.

**planning instance** In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

**portal registry** In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

**price list** In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product’s lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

**price rule** In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

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| **price rule condition** | In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction. |
| **price rule key** | In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule. |
| **process category** | In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization. |
| **process group** | In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page. |
| **process definition** | Process definitions define each run request. |
| **process instance** | A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run. |
| **process job** | You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request. |
| **process request** | A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler. |
| **process run control** | A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request. |
| **product category** | In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category. |
| **programs** | In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications. |
| **progress log** | In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project. |
| **project transaction** | In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row. |
| **promotion** | In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume. |
| **publishing** | In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants. |
| **record group** | A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views. |
| **record input VAT flag** | Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT |

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

**record output VAT flag**
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

**reference data**
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

**reference object**
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

**reference transaction**
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

**regional sourcing**
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

**relationship object**
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

**remote data source data**
Data that is extracted from a separate database and migrated into the local database.

**REN server**
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

**requester**
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

**role**
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

**role user**
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

**roll up**
In a tree, to roll up is to total sums based on the information hierarchy.

**run control**
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

**run control ID**
A unique ID to associate each user with his or her own run control table entries.

**run-level context** — In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

**search query** — You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

**section** — In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

**security event** — In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

**serial genealogy** — In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

**serial in production** — In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

**session** — In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

**session template** — In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

**setup relationship** — In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

**share driver expression** — In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

**single signon** — With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

**source transaction** — In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

**SpeedChart** — A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

**SpeedType** — A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

**staging** — A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

**statutory account** Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

**step** In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

**storage level** In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

**subcustomer qualifier** A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

**Summary ChartField** You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

**summary ledger** An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

**summary time period** In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

**summary tree** A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

**syndicate** To distribute a production version of the enterprise catalog to partners.

**system function** In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

**TableSet** A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

**TableSet sharing** Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

**target currency** The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

**template** A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

**territory** In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

**TimeSpan** A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

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| | than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects. |
| **trace usage** | In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record. |
| **transaction allocation** | In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables. |
| **transaction state** | In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing. |
| **Translate table** | A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own. |
| **tree** | The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies. |
| **unclaimed transaction** | In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator. |
| **universal navigation header** | Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user. |
| **user interaction object** | In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups). |
| **variable** | In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section. |
| **VAT exception** | Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension. |
| **VAT exempt** | Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery. |
| **VAT exoneration** | Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization. |
| **VAT suspension** | Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT. |
| **warehouse** | A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions. |

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| **work order** | In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order. |
| **worksheet** | A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information. |
| **worklist** | The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item. |
| **XML schema** | An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks. |
| **yield by operation** | In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis. |
| **zero-rated VAT** | Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery. |

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