PeopleSoft 8
CRM Marketing PeopleBook

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SKU CRMr8CMKT-B 0601

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Printed in the United States of America.

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ABOUT THIS PEOPLEBOOK

The book provides you with the information that you need to implement and use PeopleSoft *CRM Marketing*. You can order the online version by requesting SKU *CRMB8r0* or the print version by requesting SKU *CRMr8CMKT-B 0601*.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft *CRM* product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating through the system and adding, updating, and deleting information 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.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (**www.peoplesoft.com**). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: **http://www.peoplesoft.com/.**

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of 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 delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *CRM* SKU *CRMB8r0*.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: **http://www.peoplesoft.com/**.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not 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 W.
Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand. • Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8 Billing PeopleBook.* • Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8 Projects PeopleBook,* “Integrating With PeopleSoft Billing and PeopleSoft Contracts.” • Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see “Securing Your PeopleSoft Contracts System.” • Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates **For more information** cross-references to related or additional information.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, 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 comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

PeopleSoft CRM Marketing PeopleBook

PeopleSoft CRM Marketing helps you plan, manage, execute, and track marketing campaigns.

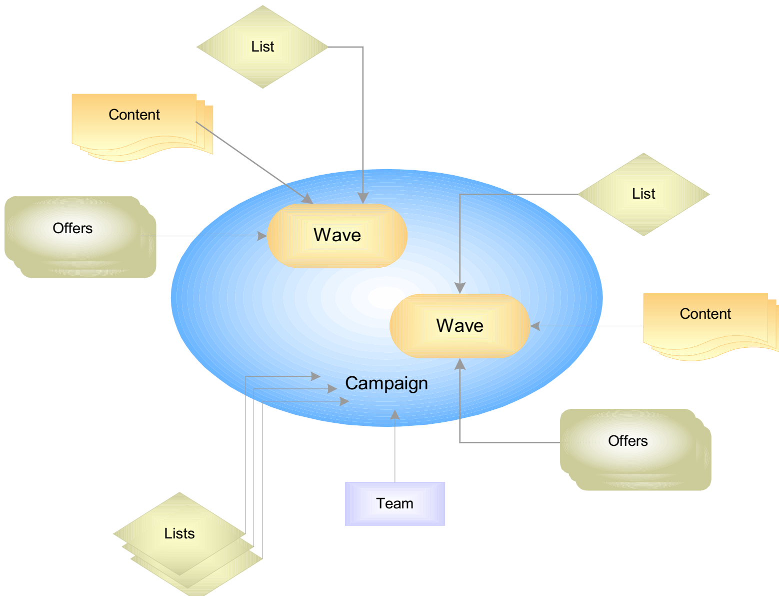
PeopleSoft CRM Marketing PeopleBook Contents

This book contains the following chapters:

Introduction to Marketing	Introduces the reader to the fundamentals of PeopleSoft CRM Marketing. Includes descriptions of campaign objects, overviews of campaign-building processes, and links to the PeopleSoft components that comprise PeopleSoft CRM Marketing.
Understanding Campaigns and Waves	Describes campaigns and waves.
Defining Marketing Business Units	Describes the role of business units in PeopleSoft CRM Marketing. Explains how to create PeopleSoft CRM Marketing business units.
Setting Up Marketing	Explains how to set up those objects that are used throughout PeopleSoft CRM Marketing.
Creating Campaigns and Waves	Explains how to create and manage campaigns and waves.
Creating Campaign Content	Describes campaign content. Explains how to create and manage campaign content.
Using Campaign Offers	Describes campaign offers. Explains how to create and manage campaign offers.
Using Lists	Describes lists. Explains how to create and manage lists.
Using PeopleSoft CRM Marketing Workflow	Describes PeopleSoft CRM Marketing workflow. Explains how to use PeopleSoft CRM Marketing workflow.
Using Metrics	Describes PeopleSoft CRM Marketing metrics. Explains how to use PeopleSoft CRM Marketing metrics.
Running Marketing Reports	Describes PeopleSoft CRM Marketing reports. Explains how to use PeopleSoft CRM Marketing reports.

Overview of Campaign Basics

The structure of a PeopleSoft CRM Marketing campaign is relatively simple. The following diagram represents that structure:



Overall campaign structure

Campaigns

A PeopleSoft 8 CRM Marketing campaign represents a real-world marketing campaign. A marketing campaign is an effort 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. You define and maintain campaigns using the following PeopleSoft CRM Marketing components:

- Campaign Management Home
- Campaign Detail
- Campaign Run Control
- Campaign Statuses
- Campaign Objectives
- Budget Sources

Note. A PeopleSoft component is an object composed of one or more application pages.

For more information about campaigns, see the Understanding Campaigns and Waves chapter.

Waves

Most campaigns contain waves. A wave represents action taken to communicate with a target audience as part of a marketing campaign. For example, the creation and distribution of a series of advertisements might constitute a wave.

You define and manage waves using the following PeopleSoft CRM Marketing components:

- Campaign Statuses
- Channel Activities
- Channel Types
- Channels
- Maintain Channel Cost

For more information about waves, see the Understanding Campaigns and Waves chapter.

Content, Offers, and Lists

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

Content

All the material that you produce to support a campaign, for use both inside and outside of your organizations. Content includes the following examples:

- Press kits
- Television commercials
- Market research summaries
- Web pages

You define and maintain content on the following PeopleSoft CRM Marketing component:

- Manage Content
- Content Types
- Content Subtypes

For more information about content, see the Creating Campaign Content chapter.

Offers

A PeopleSoft CRM Marketing *offer* represents everything that you offer to your customers. An offer includes the following elements and attributes:

- Product list
- Price set (complex or simple pricing structure)
- Dates when offer is valid

You define and maintain offers on the following PeopleSoft CRM Marketing components:

- Maintain Offer
- Price Sets
- Import Price Sets

For more information about promotional offers, see the Using Offers chapter.

Lists

Groups of people whom you target with marketing campaigns.

You define and maintain lists on the following PeopleSoft CRM Marketing components:

- List Detail
- Export Campaign List

For more information about lists, see the Using Lists chapter.

PeopleSoft CRM Marketing Workflow

PeopleSoft CRM Marketing workflow enables you to notify team members of campaign milestones, such as content approval and completion of campaign waves. Workflow triggers enable you to automate the notification process.

You define and maintain PeopleSoft CRM Marketing workflow on the following PeopleSoft CRM Marketing components:

- Campaign Workflow
- Trigger List
- Workflow Messages
- Trigger Run Control
- Trigger Send Action

- Trigger Schedules

For more information about marketing workflow, see the Using PeopleSoft CRM Marketing Workflow chapter.

Campaign Metrics

Metrics—mechanisms for measuring campaign performance—help you assess the effectiveness of campaigns and campaign waves. That analysis guides you in fine-tuning campaigns in progress, and in maximizing the performance of future campaigns.

You define and maintain campaign metrics on the following PeopleSoft CRM Marketing components:

- Maintain Metrics
- Metric Types
- Metric Subtypes

For more information about campaign metrics, see the Using Metrics chapter.

Marketing Reports

You can run predefined reports that help you assess the performance of your marketing campaigns.

You define and maintain campaign reports on the following PeopleSoft CRM Marketing components:

- Campaign Effectiveness
- Wave Effectiveness
- Campaign and Wave Effectiveness
- Campaign Management Report
- Task Management Report
- Content Management Report
- Campaign-Content Management Report
- Channel Performance Report
- List Performance Report

- Product Performance Report
- ROI Report
- Campaign Expense Report

For more information about campaign reports, see the Running PeopleSoft CRM Marketing Reports chapter.

General Setup

In addition to the setup described above, you must establish PeopleSoft CRM Marketing settings using the following PeopleSoft CRM Marketing components:

- Task Types
- Cost Types
- Costs Setup
- Timeout Escalations
- Status Rules
- CM Page Fields
- CM User Filters

For more information about general setup, see the Setting Up PeopleSoft CRM Marketing chapter.

You define PeopleSoft CRM Marketing business units with the following component:

- Marketing Definition

For more information about PeopleSoft CRM Marketing business units, see the Defining PeopleSoft CRM Marketing Business Units chapter.

CHAPTER 2

Understanding Campaigns and Waves

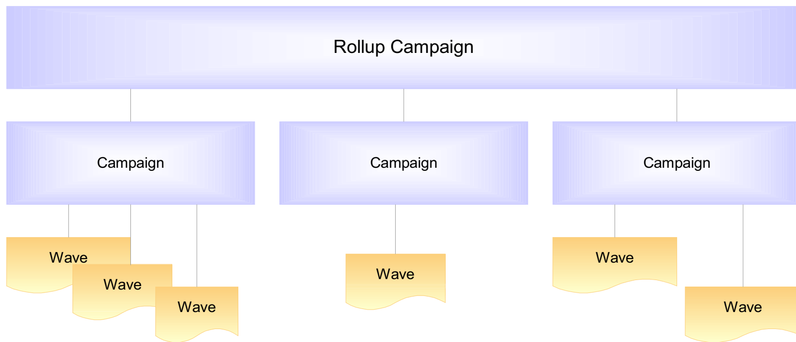
PeopleSoft CRM Marketing helps you plan, manage, execute, and track marketing campaigns. Using PeopleSoft CRM Marketing, you can coordinate the following campaign elements:

- Campaign objectives, such as building consumer loyalty and increasing market share.
- Campaign waves—the executable, action portions of marketing campaigns, such as creating and displaying advertisements or executing email blasts and sending follow-up notes to respondents.
- Marketing teams with individually-assigned roles.
- Campaign content, including such collateral material as brochures, email messages, cover letters, and catalogs.
- Tasks to be performed by team members during a campaign, such as producing brochures, purchasing television time, generating lists, and creating content.
- Lists of target audience members, who receive your promotional offers.
- Promotional offers, which incorporate products, base prices, and discount information.

For more information about content, see the Creating Campaign Content chapter. **For more information** about lists, see Using Lists. **For more information** about promotional offers, see the Using Offers chapter.

Understanding the Campaign Hierarchy

The conceptual framework underlying campaigns is illustrated in the following diagram:



Relationships between campaign elements

A *rollup campaign* occupies the highest level of the PeopleSoft CRM Marketing hierarchy. A rollup campaign contains one or more standard *campaigns.* A standard campaign contains one or more *waves,* which occupy the lowest level of the hierarchy.

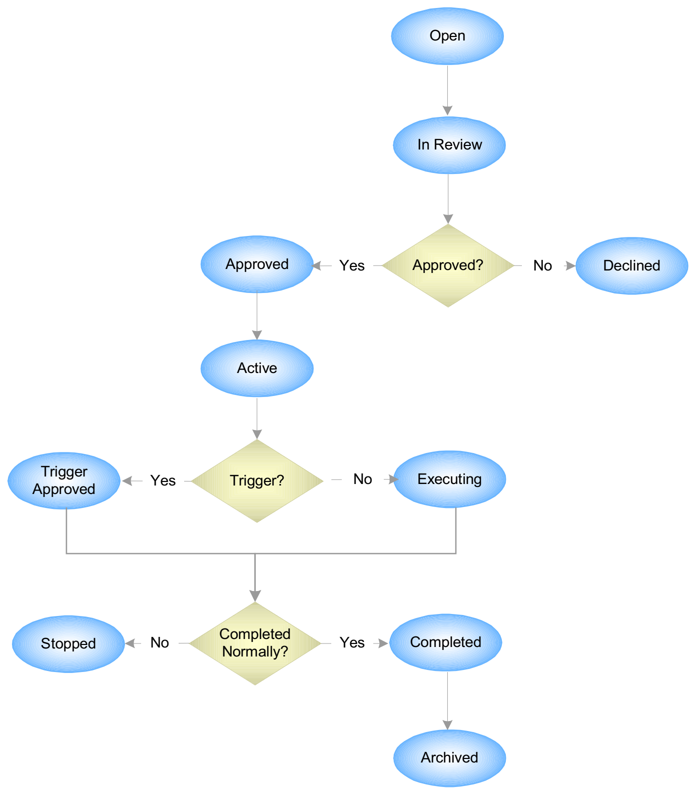
Understanding Campaign and Wave Statuses

Campaigns and waves pass through structured life cycles. At each stage in its life cycle, a campaign or wave has a *status.* Status changes can trigger events such as notification of team members and execution or cancellation of related campaigns or waves. 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.

For more information about status rules, see the Setting Up PeopleSoft CRM Marketing chapter.

Campaigns and waves follow the same basic life cycle: You create a campaign or wave, define its attributes, associate objects with it (content, lists, channels, and so on), send it for review, execute it (if approved), complete it (unless you stop it prematurely), and archive it.

The life cycle of campaigns and waves is illustrated in the following diagram:



Life cycle of campaigns and waves

Campaign and Wave Statuses

Campaigns and waves pass through the following statuses:

Status Code	***Status***	***Description***
NEW	New	Initial design phase.
IREV	In Review	In review.
DCLN	Decline	Declined by reviewer.
APPR	Approved	Approved by reviewer.
TRIG	Trigger Approved	Approved by reviewer, and ready to switch to Execution status by means of a trigger (not manually). **For more information** about triggers, see Understanding Triggers.

ACTV	Active	Ready to be executed. Before you can change a campaign or wave status to Active, the statuses of three associated elements must be as follows: The status of associated content must be Complete. The status of associated offers must be Complete. The status of associated lists must be either Active or Committed.
EXEC	Executing	Being executed. Before you can change a campaign or wave status to Executing, the statuses of three associated elements must be as follows: Content must have the status Complete. Offers must have the status Complete. Lists must have the status of either Active or Committed.
STOP	Stopped	Cancelled before the established campaign end date.
CMPL	Completed	Ended on the established campaign end date.
ARCH	Archived	Hidden from standard view. You can find for archived campaigns and waves only by entering Archived in your search parameters.

Note. Campaign object statuses are delivered predefined with your system. You cannot define new statuses in the system as delivered.

Understanding Campaigns

A PeopleSoft 8 CRM Marketing campaign represents a real-world marketing campaign. A marketing campaign is an effort by a campaign team to persuade a target audience to buy the products or services presented in promotional offers.

Example: A Campaign

Suppose that you're about to sell a new line of camping equipment—Explorer Deluxe by PeopleGear. 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 *waves,* incorporating television advertisements, direct mailings, and so on. You define concrete campaign *tasks*, such as renting billboard space and creating campaign *content,* including market research summaries and television commercials. 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 10 percent off all Explorer Deluxe equipment during the six weeks of the campaign. You create several *lists* of potential customers whom the campaign will target, including prior PeopleGear customers, members of camping organizations, and residents of certain regions. You set up *metrics* to measure the campaign's effectiveness. The vice president of marketing approves the campaign. The campaign team executes the campaign and archives it for future reference.

Understanding Campaign Characteristics

Every campaign has the following characteristics:

Campaign objective	The main goal of the campaign.
Campaign team	The employees who design and execute the campaign.
Campaign owner	The employee responsible for the campaign.

Understanding Campaign Objectives

An effective campaign combines various marketing activities in a concerted effort to achieve one central goal. The campaign *objective* is that central goal. You can select from the following predefined campaign objectives:

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 are complementary to those that they already have 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 may report on your products or services.
Product Launch	Introduce new products or services.
Up Sell	Encourage your target audience to purchase products or services that are of higher value or more expensive than those that it already intends to buy.

Note. You can define additional campaign objectives using the Campaign Objectives page.

Understanding Campaign Teams

You can define a distinct team of employees to execute each campaign, giving each person an individual campaign role. You assign campaign team roles on the Campaign Detail-Team page.

The following campaign team roles are delivered:

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

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

Important! The preceding roles are defined for your 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, using PeopleSoft Application Designer.

For more information about using PeopleSoft Application Designer, see Application Designer in the *PeopleTools Application Designer PeopleBook.*

You can assign specific campaign tasks to specific team members.

Team members, based on their team roles, 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 a wave is stopped prematurely.

Understanding Campaign Owners

A campaign owner takes responsibility for the successful design and execution of a campaign. A campaign owner is functionally the same as any other employee. A campaign owner often serves as campaign manager.

Associating Tasks With Campaigns

Campaign tasks are those activities that produce a campaign. Tasks may include designing advertisements, distributing brochures, and polling members of your target audience.

You give each task a status (which you can change manually as the task is performed), a type, an owner (an employee assigned to perform the task), a priority level, and start and end dates. You can enter the percentage of the task completed at any time.

You define and update tasks on the Campaign Detail-Campaign Task Detail page. You associate tasks with campaigns on the Campaign Detail-Campaign Details page.

Understanding Task Types

You categorize each task with a *type* designation. You use task types to indicate the general goals of your tasks.

The following predefined task types are delivered with your system:

Task Type	***Description***
Build Models	Build models of campaign elements, to study campaign design concepts.
Create an Offer	Set up a promotional offer.
Create the Content	Create campaign content.
Define new channel	Define a new campaign channel.
Generate a List	Generate a list of target audience members.
Generate a Segment	Generate a list of target audience members, as a subset of a full list.
Request Budget	Propose a campaign budget and await management approval.
Run Campaign Effectiveness Rep	Generate a report designed to help you measure campaign effectiveness.
Schedule channel availability	Secure the use of a campaign delivery channel.
Score Lists	Judge the effectiveness of lists.
Setup Triggers	Set up campaign triggers.

Note. You can define additional task types on the Task Types page.

Understanding Campaign Triggers

Your system can initiate campaign events at specified times or when specified conditions are met, using campaign triggers. You set up campaign triggers on the Campaign Detail: Campaign Triggers page.

Understanding Trigger Types

Trigger types represent the ways in which the system determines when to trigger campaign events. For each trigger, you select one of three trigger types:

Date and Time System initiates campaign events on specified dates and times.

Metric to Metric System initiates campaign events when two metric results align as defined.

For example, you might set up a trigger to take effect when the response rate of one wave exceeds the response rate of another wave.

Metric to Value System initiates campaign events when a metric value matches a fixed amount.

For example, you might set up a trigger to take effect when the number of leads generated by a campaign equals 1,000.

Understanding Trigger Schedules

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

Using triggers, you can initiate up to four actions:

Execute Campaign Select the check box next to the **Execute Campaign** field to execute a campaign when the trigger condition is true. Select the campaign to execute in the **Execute Campaign** field. Optionally, select the wave ID within the selected campaign in which the execute selection is acted upon.

Stop Campaign Select the check box next to the **Stop Campaign** field to stop a campaign when the trigger condition is true. Select the campaign to stop in the **Stop Campaign** field. Optionally, select the wave ID within the selected campaign in which the stop selection is acted upon.

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

Generate List Select the check box next to the **Generate List** field to generate a list when the trigger condition is true. Select the list to generate in the **Generate List** field. You generate the list by scheduling the processor to run the List Generation Application Engine program. List generation entails asynchronous processing.

Associating Lists With Campaigns

You can associate multiple target audience lists with each campaign. This helps you plan and track your campaigns.

For more information about lists, see the Using Lists chapter.

Understanding Rollup Campaigns

A rollup campaign is a marketing campaign that contains other marketing campaigns. That is, a parent campaign with several child campaigns.

Example: A Rollup Campaign

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 campaigns as rollup campaigns so that you can establish campaign hierarchies. Campaigns function the same, whether they are rollup campaigns or standard campaigns.

Understanding Waves

A wave represents action taken as part of a marketing campaign. For example, the creation and distribution of a series of advertisements could constitute a wave.

All waves exist within campaigns, but not all campaigns have waves; that is, waves and campaigns have a one-to-many relationship. The waves of a single campaign often share a common marketing theme, and usually focus on the same product or product line. You can execute multiple waves sequentially (different waves at different times) or simultaneously (all waves at once).

Example: Two Waves

Consider two waves of the Explorer Deluxe camping gear product launch campaign, mentioned above in Understanding Campaigns.

One wave involves sending direct mail to potential customers. You send packets containing glossy photographs of the new Explorer Deluxe camping gear, and information about purchasing that equipment with a 10-percent discount on tents and sleeping bags.

Another wave involves sending email to potential customers. You send links to your website (where you display photographs of the new Explorer Deluxe camping gear), and offer email recipients a 10-percent discount on tents and sleeping bags.

The two waves share some similarities. Both support a product launch campaign. Both promote the same 10-percent discount on tents and sleeping bags. And the tasks to be performed in both waves—shooting photos of Explorer Deluxe camping gear, preparing a 10-percent discount offer, creating target audience lists, and so on—are similar.

The two waves also differ from one another. The first wave uses postal mail, while the second uses email. The budget of the first campaign is much larger than the budget of the second. The lists of target audience members are also different: one wave is aimed at people who are less likely to use the internet, such as older consumers; whereas the other targets heavy web users, such as students. The ad copy of the two campaigns will differ accordingly.

Understanding Wave Characteristics

Every wave has the following characteristics:

Budget	Money allocated for the wave.
Activity	The tactic that you use to influence your target audience.
Channel Type	The medium that you use to deliver your message.
Channel	The specific media outlet that you use to deliver your message.

You define wave characteristics on the Campaign Detail-Wave Detail page.

Understanding Wave Budgets and Expenses

You can enter any amount of money as a wave budget.

As you design and execute your waves, you can enter the expenses incurred, and compare those expenses with your existing budget.

The system includes expense metrics to measure your waves' cost effectiveness.

For more information about metrics, see the Using Metrics chapter.

Understanding Channel Types and Channels

You deliver your campaign messages through *channels* of various *channel types.* Channel types represent media, such as television, radio, and newspapers. Channels represent individual media outlets, such as the NBC television network, radio station WBAI, and the *Des Moines Register* newspaper.

The most commonly used channel types and channels are predefined and delivered with your system. You can define additional channel types on the Channel Types page. You can define additional channels on the Channels page.

Understanding Wave Activities

A wave activity is a tactic to influence your target audience. For example, you might use events as tactics to convey your 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 played whenever a customer called your telephone support line; communicating through the telephone support line would be your tactic, or wave activity.

You can select from the following predefined wave activities:

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.

Your choice of activity determines which channel types are available. For example, if you select the activity Print, the channel types Newspaper, Magazine, and Flyer become available.

Associating Lists, Offers, and Content With Campaigns and Waves

You can associate various elements with your waves. This helps you plan and track your marketing efforts.

Associating Lists With Waves

You can associate one target audience list with each wave.

For more information about lists, see the Using Lists chapter.

Associating Offers With Waves

You can associate one promotional offer with each wave.

For more information about promotional offers, see the Using Offers chapter.

Associating Content With Waves

You can associate one item of content with each wave.

For more information about content, see the Creating Campaign Content chapter.

Associating Branch Scripts With Waves

When your employees communicate with customers about campaigns, they can follow interactive scripts that you have prepared in advance. Such scripts are called *branch scripts.*

Branch 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 branch script can trigger the salesperson's system to open a web page on which hard drive information is displayed. 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 two types of branch script with each wave:

Inbound	Inbound branch scripts guide interactions with customers who initiate contact with your company.
Outbound	Outbound branch scripts guide interactions with customers with whom your company initiates contact.

You create branch scripts using the PeopleSoft branch scripting tools. You associate branch scripts with waves on the Campaign Detail – Wave Detail page.

You can execute branch scripts using various PeopleSoft CRM applications, not including PeopleSoft CRM Marketing. In PeopleSoft CRM Marketing, you can associate branch scripts with waves for organizational purposes, but you cannot execute branch scripts.

For more information of the creation and use of branch scripts, see Defining Branch Scripts in *PeopleSoft CRM Application Fundamentals PeopleBook.*

C H A P T E R 3

Defining PeopleSoft CRM Marketing Business Units

PeopleSoft CRM 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 some business unit; hence, every marketing campaign is associated with a branch office within your organization.

This organizational structure helps you quickly locate the campaigns that you need, because you can limit searches by business unit. You define a default business unit, so you don't need to specify your home business unit every time you access the system; you specify a business unit only when you need to access another business unit.

You also filter results in PeopleSoft CRM Marketing by business unit.

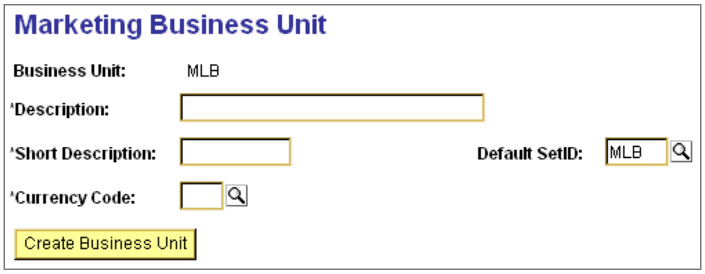
Example: Business Units

Suppose that you you're about to launch a summer marketing campaign, and you'd like to reuse a campaign that you created the previous summer.

First, you need to find the exact report to clone. So you run a report of all campaigns produced in your office last summer. (The system searches within your home business unit by default.) You find the campaign that you want to clone, listed in the report. Good news! A second report reminds you that your office generated many good leads with that campaign. You select the campaign and clone it.

Marketing Business Unit Page

Usage	Use the Marketing Business Unit page to define PeopleSoft CRM Marketing business units.
Object Name	RA_BUS_UNIT_TBL
Navigation	**Define Business Rules, Establish Business Units, Use, Marketing Definition**
Access Requirements	Enter a business unit ID.



Marketing Business Unit page

Business Unit The code that uniquely identifies the business unit.

Description Enter a description of the business unit.

Short Description Enter an abbreviated description of the business unit.

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

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 CRM.

Create Business Unit Click Create Business Unit to Save and create the new business unit. This has the same effect as just 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 CRM.

Note. For the set control value that corresponds to your PeopleSoft CRM Marketing business unit, you must associate record groups RA_01 and RA_02 with the same setID as one another. For the set control value that corresponds to your PeopleSoft CRM Marketing setID, you must associate record groups RA_01 and RA_02 with the same setID as the setID that you associate with record groups RA_01 and RA_02 for the set control value that corresponds to your PeopleSoft CRM Marketing business unit.

CHAPTER 4

Setting Up PeopleSoft CRM Marketing

Before you can create marketing campaigns, waves, and associated objects, you must define the basic attributes of those objects. Then you can use those basic attributes as building blocks for your campaigns.

Defining Status Rules

Status rules apply to virtually all PeopleSoft CRM Marketing objects. They represent stages in the life cycles of those objects.

You can determine which statuses your campaign objects must cycle through and in which order. Or you can accept the default status rules that are delivered with the system.

You assign statuses by campaign object type. PeopleSoft CRM Marketing includes the following campaign object types:

- Campaign
- Campaign Content
- Campaign Offer
- Campaign Task
- Campaign Wave
- Content Task

Example: Status Rule

Suppose that you create a spring campaign to promote a popular line of backpacks. You have set up status rules to enforce the following order of campaign creation:

1. New
2. In Review
3. Approved or Decline
4. Active
5. Executing

6. Completed or Stopped

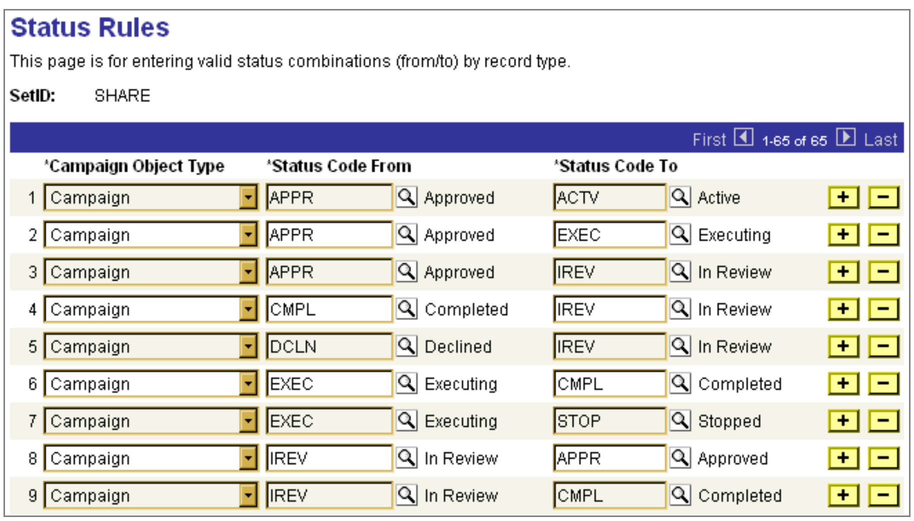
7. Archived

If a member of your campaign team attempts to change statuses in a different order, the system displays an error message and rejects the status change.

For example, if a user attempts to change a campaign's status directly from New to Active, the system prevents the change. That user must submit the campaign for review and approval before proceeding.

Status Rules Page

Usage	Use the Status Rules page to determine …
Object Name	RA_UD_STAT_CMB1
Navigation	**Define Business Rules, Structure Campaign Management, Setup, Status Rules**
Access Requirements	Enter a setID.



Status Rules

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

SetID: SHARE

First 1-65 of 65 Last

	*Campaign Object Type	*Status Code From		*Status Code To	
1	Campaign	APPR	Approved	ACTV	Active
2	Campaign	APPR	Approved	EXEC	Executing
3	Campaign	APPR	Approved	IREV	In Review
4	Campaign	CMPL	Completed	IREV	In Review
5	Campaign	DCLN	Declined	IREV	In Review
6	Campaign	EXEC	Executing	CMPL	Completed
7	Campaign	EXEC	Executing	STOP	Stopped
8	Campaign	IREV	In Review	APPR	Approved
9	Campaign	IREV	In Review	CMPL	Completed

Status Rules page

Status Rules Header Region

SetID The setID within which the status rules reside.

Status Rules Header Region

Campaign Object Type	Select the type of campaign object to which the status rule applies. There are seven types of campaign object: • *Campaign* • *Campaign Content* • *Campaign Offer* • *Campaign Task* • *Campaign Wave* • *Campaign Task* •
Status Code From	Select a valid initial status for the campaign object.
Status Code To	Select a valid subsequent status for the campaign object.

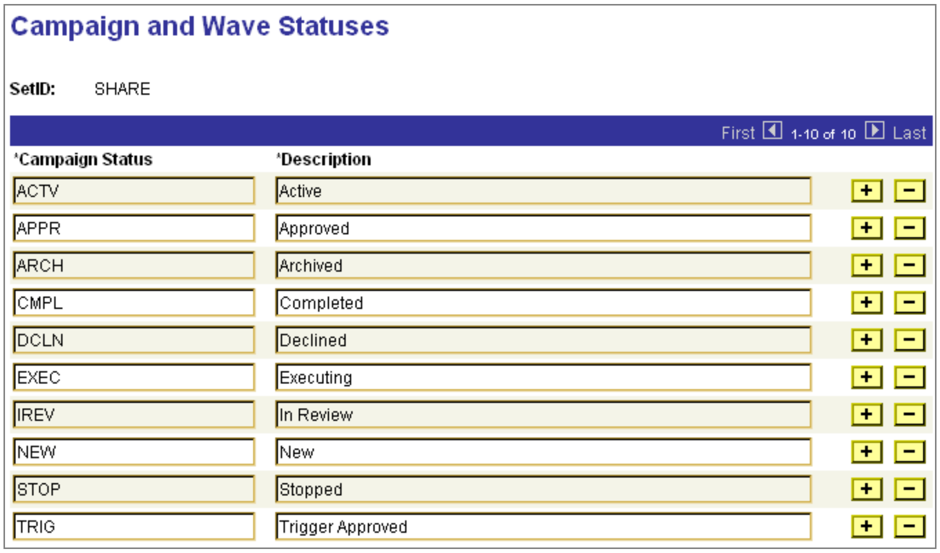
Defining Basic Attributes of Campaigns

Before you can design campaigns, you must define the following basic campaign attributes:

Statuses	Stages of campaign life cycles.
Objectives	Central goals of campaigns.
Budget Sources	Sources of funding for the design and execution of your marketing campaigns.

Campaign and Wave Statuses Page

Usage	Use the Campaign and Wave Statuses page to define campaign/wave statuses. **Note.** Campaign and wave statuses are identical objects, although they are used separately.
Object Name	RA_UD_CMPGN_STAT
Navigation	**Define Business Rules, Structure Campaign Management, Use, Campaign Statuses**
Access Requirements	Enter a setID.



Campaign and Wave Statuses page

Channel and Wave Statuses Header Region

SetID The setID within which the campaign statuses reside.

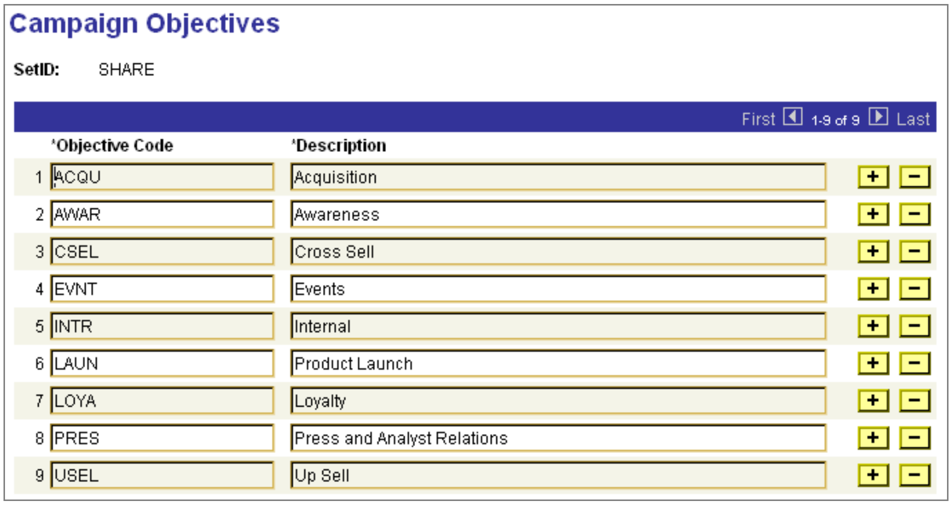
Channel and Wave Statuses Region

Campaign Status Enter the code that uniquely identifies the campaign/wave status. The codes distributed are suggested codes. Modifications to the existing status codes is not recommended.

Description Enter a brief description of the campaign/wave status.

Campaign Objectives Page

Usage	Use the Campaign Objectives page to define campaign objectives.
Object Name	RA_UD_CMPGN_OBJ
Navigation	**Define Business Rules, Structure Campaign Management, Use, Campaign Objectives**
Access Requirements	Enter a setID.



Campaign Objectives page

Campaign Objectives Header Region

SetID The setID within which the campaign objectives reside.

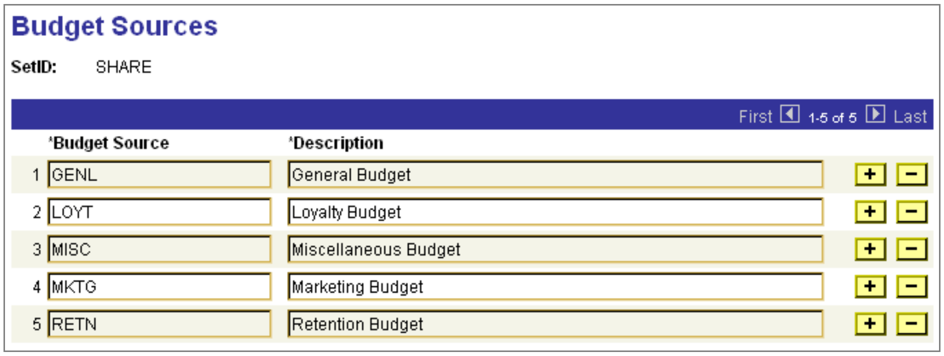
Campaign Objectives Region

Objective Code Enter a code that uniquely identifies the campaign objective.

Description Enter a brief description of the campaign objective.

Budget Sources Page

Usage	Use the Budget Sources page to define budget sources.
Object Name	RA_UD_BUDGT_SRC
Navigation	**Define Business Rules, Structure Campaign Management, Use, Budget Sources**
Access Requirements	Enter a setID.



Budget Sources page

Budget Sources Header Region

SetID The setID within which the budget sources reside.

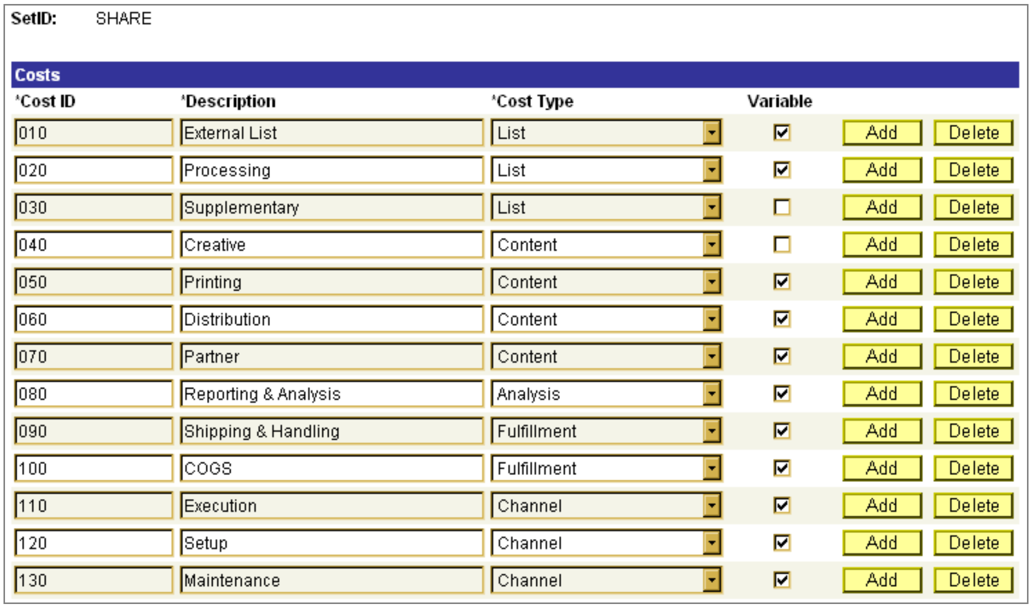
Budget Sources Region

Budget Source Enter a code that uniquely identifies the budget source.

Description Enter a brief description of the budget source.

Costs Setup Page

Usage	Use the Costs Setup page to define the costs that you associate with various campaign objects, including lists and content.
Object Name	RA_COST_METRICS
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Costs Setup**
Access Requirements	Enter a setID.



SetID: SHARE

Costs

*Cost ID	*Description	*Cost Type	Variable		
010	External List	List	☑	Add	Delete
020	Processing	List	☑	Add	Delete
030	Supplementary	List	☐	Add	Delete
040	Creative	Content	☐	Add	Delete
050	Printing	Content	☑	Add	Delete
060	Distribution	Content	☑	Add	Delete
070	Partner	Content	☑	Add	Delete
080	Reporting & Analysis	Analysis	☑	Add	Delete
090	Shipping & Handling	Fulfillment	☑	Add	Delete
100	COGS	Fulfillment	☑	Add	Delete
110	Execution	Channel	☑	Add	Delete
120	Setup	Channel	☑	Add	Delete
130	Maintenance	Channel	☑	Add	Delete

Costs Setup page

Costs Header Region

SetID The setID within which the costs reside.

Costs Region

Cost ID Enter a code that uniquely identifies the cost.

Description Enter a brief description of the cost.

Cost Type Select the cost type.

Note. You define cost types on the Cost Types page.

Variable Select **Variable** if the cost is variable. Clear the **Variable** check box if the cost is fixed.

If the cost is fixed, you freeze the Unit Cost field (preventing users from entering data) if you enter a value in the Cost field of either the Campaign Detail - Metrics Page or the Campaign Detail - Wave Detail page.

If the cost is variable, you can edit the Unit Cost fields of either the Campaign Detail – Metrics Page or the Campaign Detail – Wave Detail page.

Defining Basic Attributes of Waves

Before you can design campaign waves, you must define the following basic wave attributes:

Activities	The tactics that you use to influence your target audiences.
Channel Types	The media that you use to deliver your messages.
Channels	The specific media outlets that you use to deliver your messages.

Example: Basic Wave Attributes

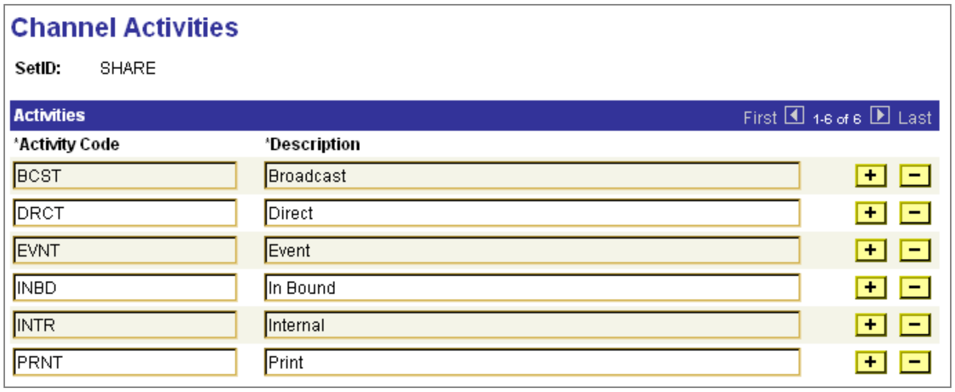
Suppose that you define the following basic wave attributes:

Object	***Value***
Activity	Outdoors
Channel Type	Billboards
Channel	United Billboards, Inc.

You could combine your basic wave attributes to define a wave consisting of advertisements posted on billboards leased from United Billboards, Inc.

Channel Activities Page

Usage	Use the Channel Activities page to define channel activities.
Object Name	RA_UD_ACTIVITY
Navigation	**Define Business Rules, Structure Campaign Management, Use, Channel Activities**
Access Requirements	Enter a setID.



Channel Activities page

Channel Activities Header Region

SetID The setID within which the channel activities reside.

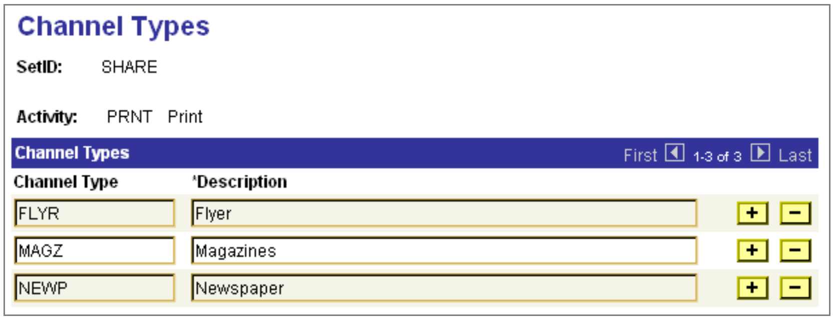
Activities Region

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

Description Enter a brief description of the channel activity.

Channel Types Page

Usage	Use the Channel Types page to define channel types.
Object Name	RA_UD_CHNL_TYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Channel Types**
Prerequisites	Define an activity, on the Channel Activities page.
Access Requirements	Enter a setID and an activity.



Channel Types page

Channel Types Header Region

SetID	The setID within which the channel types reside.
Activity	The code that uniquely identifies the channel activity.

Channel Types Region

Channel Type	Enter a code that uniquely identifies the channel type.
Description	Enter a brief description of the channel type.

Channels Page

Usage	Channels Page
Object Name	RA_UD_CHANNEL
Navigation	**Define Business Rules, Structure Campaign Management, Use, Channels**
Prerequisites	Define an activity on the Channel Activities page and a channel type on the Channel Types page.
Access Requirements	Enter a setID, an activity, and a channel type.

Channels page

Channels Header Region

SetID	The setID within which the channels reside.
Activity	The code that uniquely identifies the channel activity.
Channel Type	The code that uniquely identifies the channel type to which the channel belongs.

Channels Region

Channel	Enter a code that uniquely identifies the channel.
Description	Enter a brief description of the channel.

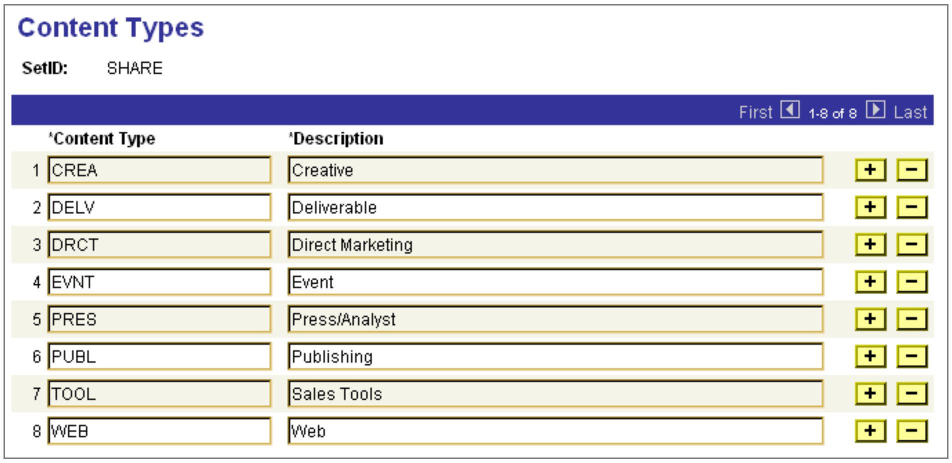
Defining Basic Attributes of Content

Before you can design campaign content, you must define the following basic content attributes:

Content Types	Content types identify the types of content that you create, for organizational purposes.
Content Subtypes	Content subtypes are a subset of content types, but define content more precisely.

Content Types Page

Usage	Use the Content Types page to define content types.
Object Name	RA_UD_CONT_TYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Content Types**
Access Requirements	Enter a setID.



Content Types page

Content Types Header Region

SetID The setID within which the content types reside.

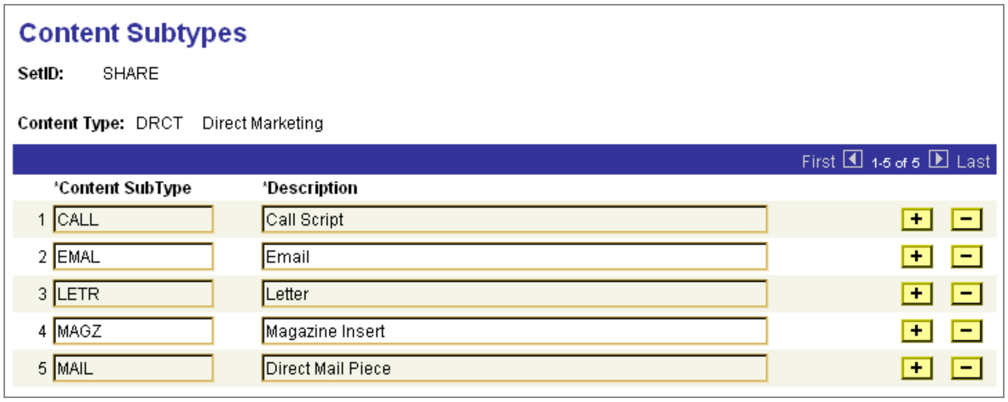
Content Types Region

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

Description Enter a brief description of the content type.

Content Subtypes Page

Usage	Use the Content Subtypes page to define content subtypes.
Object Name	RA_UD_CNT_STYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Content Subtypes**
Prerequisites	Define a content type, on the Content Types page.
Access Requirements	Enter a setID and a content type.



Content Subtypes page

Content Subtypes Header Region

SetID	The setID within which the content subtypes reside.
Content Type	The content type to which the content subtype belongs.

Content Subtypes Region

Content SubType	Enter a code that uniquely identifies the content subtype.
Description	Enter a brief description of the content subtype.

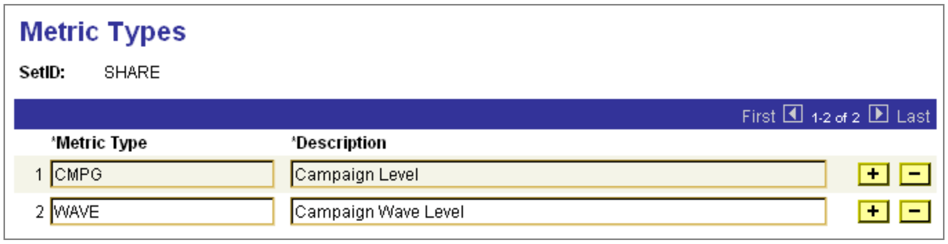
Defining Basic Attributes of Metrics

Before you can design campaign metrics, you must define the following basic metric attributes:

Metric Types	Metric types identify the types of metrics that you create, for organizational purposes.
Metric Subtypes	Metric subtypes are a subset of metric types but define the metric more precisely.

Metric Types Page

Usage	Use the Metric Types page to define metric types.
Object Name	RA_UD_MET_TYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Metric Types**
Access Requirements	Enter a setID.



Metric Types page

Metric Types Header Region

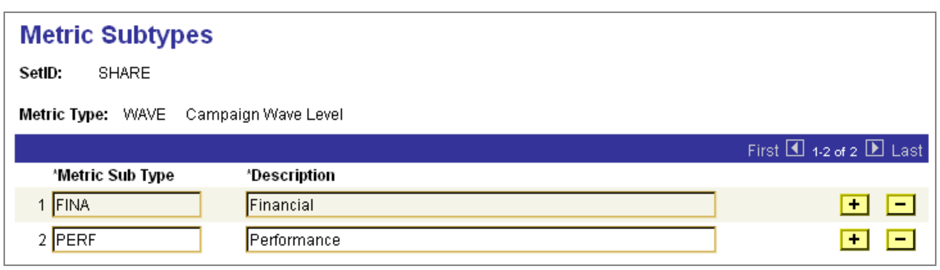
SetID	The setID within which the metric types reside.

Metric Types Region

Metric Type	Enter a code that uniquely identifies the metric type.
Description	Enter a brief description of the metric type.

Metric Subtypes Page

Usage	Use the Metric Subtypes page to define metric subtypes.
Object Name	RA_UD_MET_STYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Metric Subtypes**
Prerequisites	Define a metric type.
Access Requirements	Enter a setID and a metric type.



Metric Subtypes page

Metric Subtypes Header Region

SetID	The setID within which the metric subtypes reside.
Metric Type	The metric type to which the metric subtype belongs.

Metric Subtypes Region

Metric Sub Type	Enter a code that uniquely identifies the metric subtype.
Description	Enter a brief description of the metric subtype.

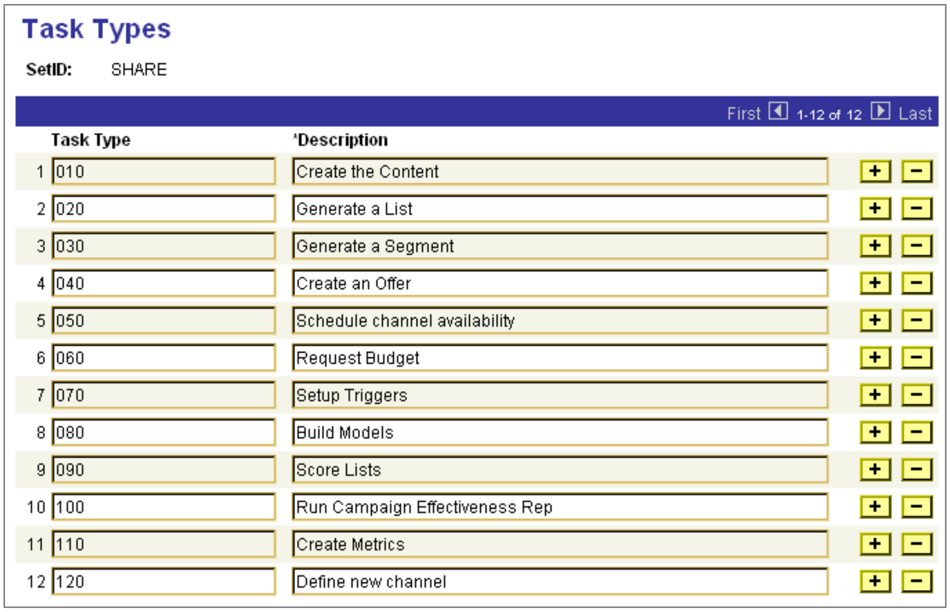
General Setup

Before you can take full advantage of PeopleSoft CRM Marketing, you must set up the following campaign elements:

Task Types	Designations with which you categorize tasks for organizational and reporting purposes.
Cost Types	Designations with which you categorize costs for organizational and reporting purposes.

Task Types Page

Usage	Use the Task Types page to define task types.
Object Name	RA_UD_TASK_TYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Task Types**
Access Requirements	Enter a setID.



Task Types page

Task Types Header Region

SetID The setID within which the task types reside.

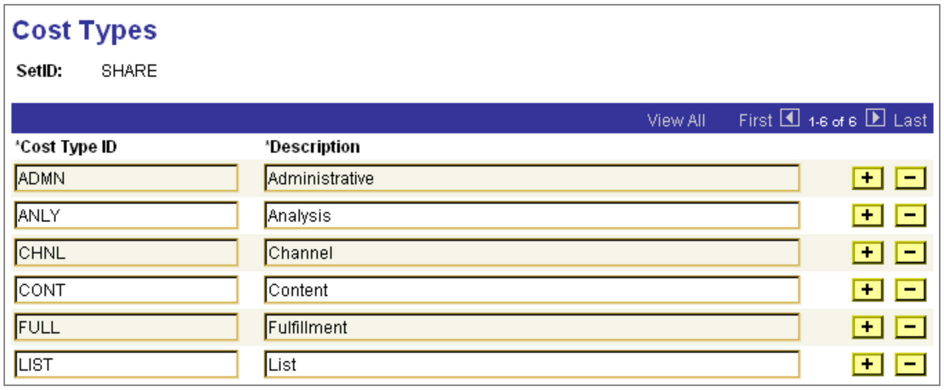
Task Types Regions

Task Type Enter a code that uniquely identifies the task type.

Description Enter a brief description of the task type.

Cost Types Page

Usage	Use the Cost Types page to define cost types.
Object Name	RA_UD_COST_TYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Cost Types**
Access Requirements	Enter a setID.



Cost Types page

Cost Types Header Region

SetID The setID within which the cost types reside.

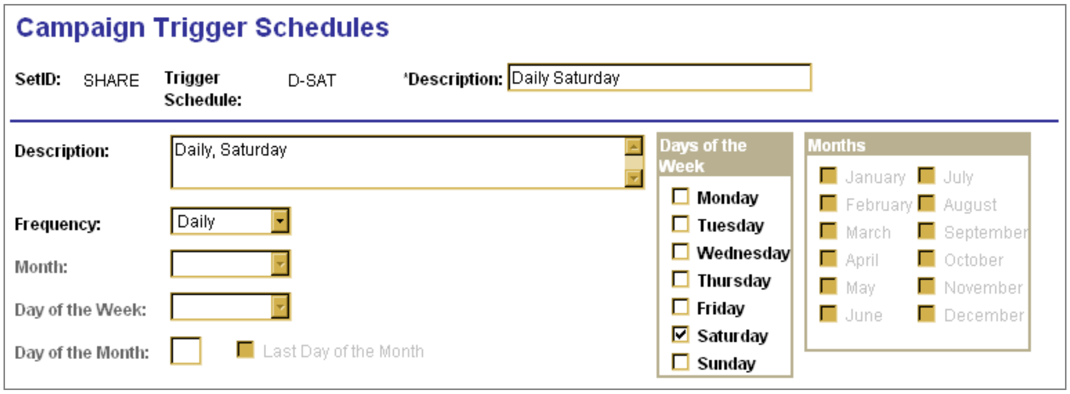
Cost Types Region

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

Description Enter a brief description of the cost type.

Campaign Trigger Schedules Page

Usage	Use the Campaign Trigger Schedules page to define system schedules for checking whether it is time to execute campaign triggers.
Object Name	RA_SCHEDULE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Trigger Schedules**
Prerequisites	Define a trigger schedule on the Campaign Trigger Schedules page.
Access Requirements	Enter a setID and a trigger schedule.



Campaign Trigger Schedules page

Campaign Trigger Schedules Header Region

SetID The setID within which the campaign trigger schedules reside.

Trigger Schedule The code that uniquely identifies the campaign trigger schedule.

Description Enter a brief description of the campaign trigger schedule.

Campaign Trigger Schedules Region

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. You have four options:

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

For example, you might 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 **Days of the Week** field becomes editable so that you can specify the days each week when the system checks campaign conditions.

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

Note. Select the ***Daily*** option when you want the system to check campaign conditions multiple times each week. Select the ***Weekly*** option when you want the system to check campaign conditions only once a week.

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

For example, you might 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 the Week** field becomes editable so that you can specify the day when the system checks campaign conditions every week.

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

Note. Select the ***Weekly*** option when you want the system to check campaign conditions only once a week. Select the ***Daily*** option when you want the system to check campaign conditions multiple times each week.

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

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

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

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

CHAPTER 5

Creating Campaigns and Waves

Using PeopleSoft CRM Marketing, you can establish goals, deliverables, dates, and budgets for a campaign; designate resources to execute that campaign; catalog materials used in the campaign; maintain metrics that automatically trigger adjustments in campaign strategy; and so on. Campaigns consist of one or more campaign waves. Each wave represents a concerted effort to influence a discrete audience.

Creating Campaigns

PeopleSoft CRM Marketing campaigns represent actual marketing campaigns.

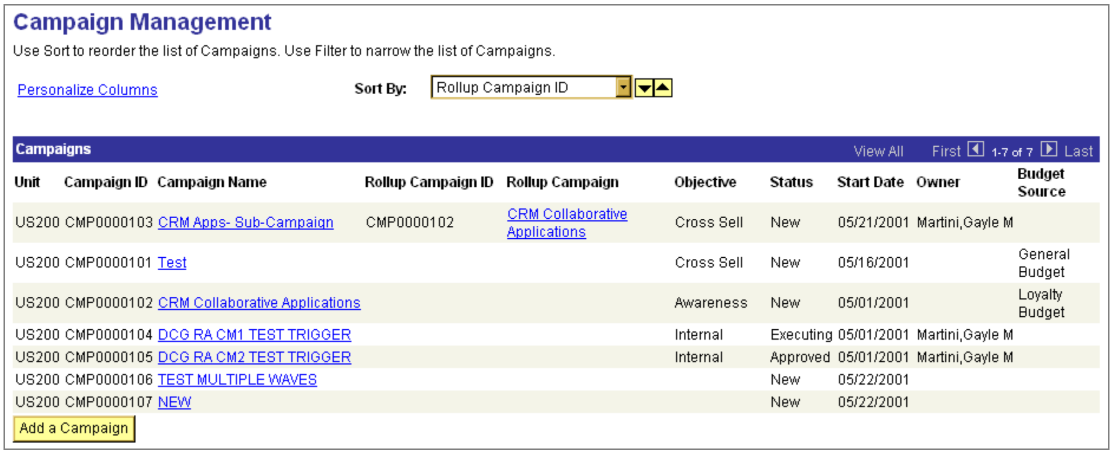
For more information about campaigns, see the Understanding Campaigns and Waves chapter.

To create a campaign:

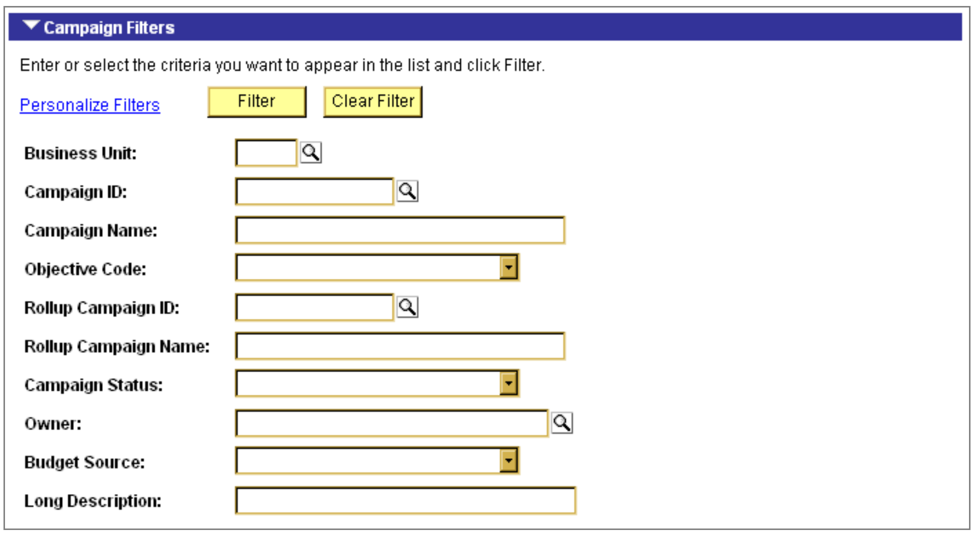
1. Define a campaign on the Campaign Detail - Campaign Details page.
2. Define campaign tasks on the Campaign Detail - Campaign Tasks page.
3. Assign campaign team members and roles on the Campaign Detail - Team Members page.
4. Attach target audience lists to the campaign on the Campaign Detail - Lists page.
5. Define campaign waves on the Campaign Detail - Wave Details page.
6. Set up campaign triggers on the Campaign Detail - Triggers page.
7. Set up campaign metrics on the Campaign Detail - Campaign Metrics page.

Campaign Management Page

Usage	Use the Campaign Management page to view a list of your marketing campaigns.
Object Name	RA_CM_HOME_GRD
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Management Home**



Campaign Management page (1 of 2)



Campaign Management page (2 of 2)

Click **Personalize Columns** to access the Personalize Columns page, where you can specify which fields appear in the **Campaigns** grid. For example, you might display the **Rollup Campaign** field but not the **Rollup Campaign ID** field.

For more information about personalizing columns, see Personalize Columns Page.

Sorting Campaigns for Display

The system bases campaign sorting order on the sorting parameters that you define. This determines the order in which campaigns are displayed in the **Campaigns** grid.

To define campaign sorting order:

1. Select the campaign attribute that will govern sorting order; the key attribute.

   For example, if you select ***Objective,*** the system will sort campaigns by objective—***Awareness, Loyalty, Product Launch,*** and so on. Or select ***Start Date*** or ***End Date*** to sort campaigns in chronological order.

2. Select the direction in which the system will sort campaigns—in ascending order (low values first) or descending order (high values first).

Campaigns Grid

The system displays those columns that you chose on the Personalize Columns page. Records are sorted in the order that you specified on the **Sort By** field.

Add a Campaign	Click the **Add a Campaign** button to access the Campaign Detail – Campaign Details page, where you can create a new campaign or update an existing campaign.

Campaign Filters Region

You can narrow the campaign selection that appears in the **Campaigns** grid by setting parameters in the **Campaign Filters** region. For example, you might choose to view only campaigns that started during the current fiscal year; or you might narrow the selection further, to campaigns that started during the current fiscal year and that have the status ***In Review.***

Personalize Filters	Click **Personalize Filters** to access the Personalize Filters page, where you can specify which filter fields appear in the **Campaign Filters** region of Campaign Management page.

For more information about personalizing filters, see Personalize Filters Page.

Filter	When you click the **Filter** button, the system displays (in the **Campaigns** grid) only those campaigns that match the values that you entered in the **Campaign Filters** fields. For example, if you enter the value ***Product Launch*** in the **Objective** field, the system displays only product launch campaigns.
Clear Filter	Show all campaigns, without regard for the parameters that you entered in the **Campaign Filters** region.

Configuring the Campaign Management Page

You determine which fields appear in two regions of the Campaign Management page:

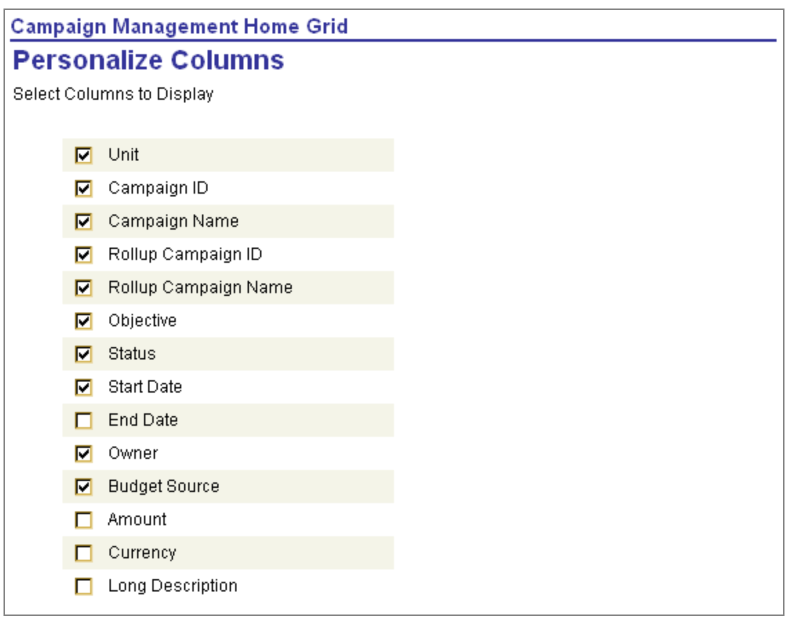
1. The Campaigns grid.

2. The Campaign Filters region.

For example, if you are not using rollup campaigns, you can easily hide the Rollup Campaign ID field and the Rollup Campaign field. Or, if you always use the same currency, you might hide the Currency field. If you ever need to view rollup campaign or currency fields, you can easily reveal them. When you hide unnecessary fields, you make your Campaign Management page less cluttered and more useful. Your selections on the Personalize Columns page and the Personalize Filters page determine page display options only, and do not effect functionality.

Personalize Columns Page

Usage	Use the Personalize Columns page to specify which fields appear in the Campaigns grid of the Campaign Management page.
Object Name	RSF_USER_FIELDS
Navigation	• **Define Business Rules, Structure Campaign Management, Use, CM User Fields** • Click Personalize Columns Page on the Campaign Management page.



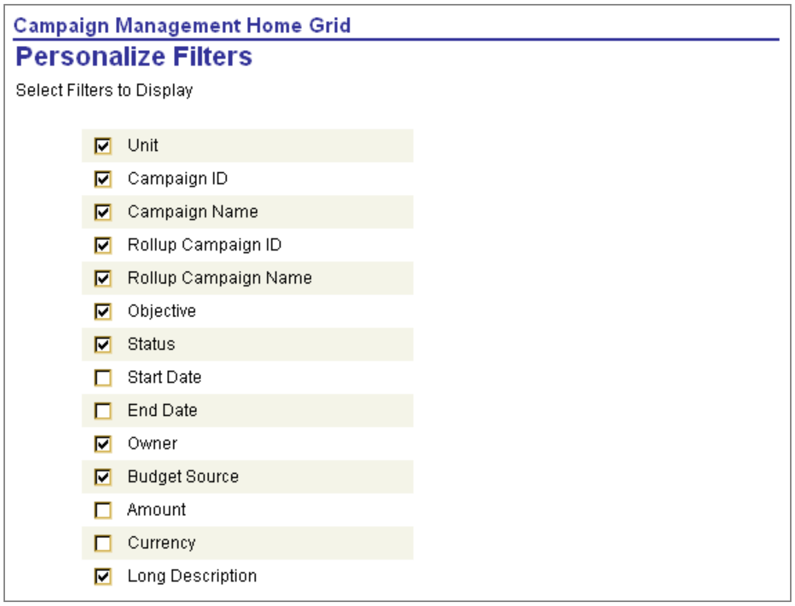
Personalize Columns page

Select the check boxes of the campaign details that you want to display in the Campaigns grid of the Campaign Management page. Clear the check boxes of those campaign details that you want to hide from view.

Unit	The business unit in which the campaign resides.
Campaign ID	Code that uniquely identifies the campaign.
Campaign Name	Descriptive code that identifies the campaign.
Rollup Campaign ID	Code that uniquely identifies the parent campaign of which this campaign is a part.
Rollup Campaign Name	Descriptive code that identifies the parent campaign of which this campaign is a part.
Objective	Code that uniquely identifies the main goal of the campaign.
Status	Position of the campaign in its life cycle.
Start Date	Date when the campaign begins.
End Date	Date when the campaign ends.
Owner	User with primary responsibility for the campaign.
Budget Source	The department that funds the campaign.
Amount	Budget allocated for the campaign.
Currency	The monetary unit in which the campaign is funded.
Long Description	Brief description of the campaign.

Personalize Filters Page

Usage	Use the Personalize Filters page to determine which filter fields appear in the Campaign Filters region of the Campaign Management page.
Object Name	RSF_USER_FILTERS
Navigation	• **Define Business Rules, Structure Campaign Management, Use, User Filters** • Click Personalize Filters on the Campaign Management page.



Personalize Filters page

Select the check boxes of the campaign details that you want to consider when filtering out campaigns from the Campaigns grid of the Campaign Management page. Clear the check boxes of those campaign details that you do not want to consider in your filters. For example, if you select the **Status, Start Date,** and **Amount** check boxes on the Personalize Filters page, the Campaign Status, Start Date, and Amount fields will appear in the Campaign Filters region of the Campaign Management page.

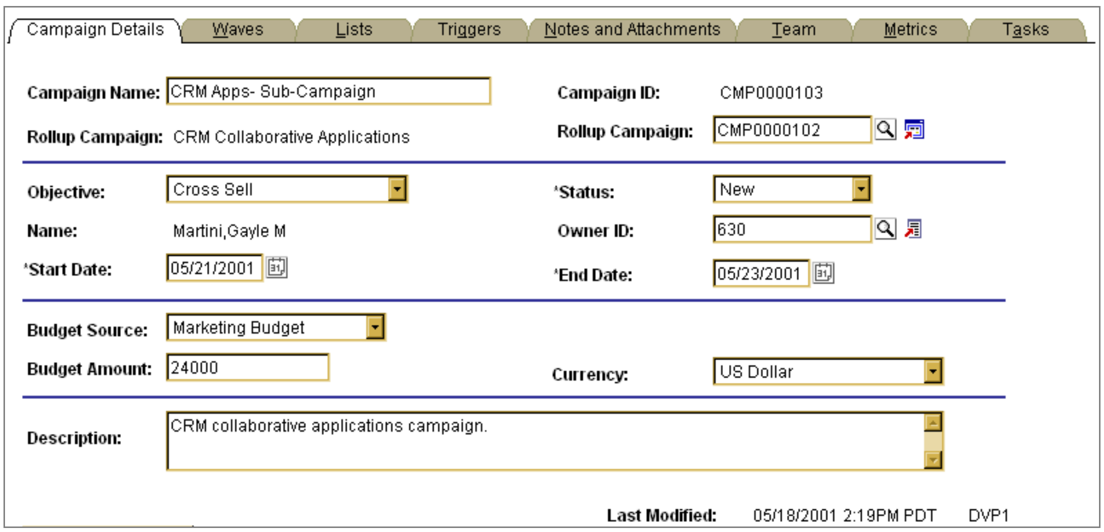
Unit	The business unit in which the campaign resides.
Campaign ID	Code that uniquely identifies the campaign.
Campaign Name	Descriptive code that identifies the campaign.
Rollup Campaign ID	Code that uniquely identifies the parent campaign of which this campaign is a part.
Rollup Campaign Name	Descriptive code that identifies the parent campaign of which this campaign is a part. **For more information** about campaign objectives, see Campaign Management Page.
Objective	Code that uniquely identifies the campaign’s main goal.
Status	Position of the campaign in its life cycle.
Start Date	Date when the campaign begins.
End Date	Date when the campaign ends.
Owner	User with primary responsibility for the campaign.
Budget Source	The department that funds the campaign.
Amount	Budget allocated for the campaign.

Currency The monetary unit in which the campaign is funded.

Long Description Complete description of the campaign.

Campaign Detail - Campaign Details Page

Usage	Use the Campaign Detail - Campaign Details page to define campaigns.
Object Name	RA_CAMPAIGN_DETAIL
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail**
Access Requirements	Enter a business unit and a campaign ID.



Campaign Details - Campaign Details page

Campaign Name Enter a descriptive code to identify the campaign.

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

Campaign ID Code that uniquely identifies the campaign.

Rollup Campaign (left side of page) The descriptive name of the parent campaign of which this campaign is a part.

Rollup Campaign (right side of page) Select the code of the parent campaign of which this campaign is a part.

Objective The main goal of the campaign.

For more information about campaign objectives, see Campaign Management Page.

Status Position of the campaign in its life cycle.

Name	Descriptive name of the user who is primarily responsible for the campaign.
Owner ID	Select the code of the user who is primarily responsible for the campaign.
Start Date	Enter or select the date when the campaign begins.
End Date	Enter or select the date when the campaign ends.
Budget Source	Select the department that will fund the campaign.
Budget Amount	Enter the amount of money allocated for the campaign.
Currency	Select the monetary unit in which the campaign will be funded.
Description	Briefly describe the campaign.
Last Modified	Date and time when the campaign was last updated.

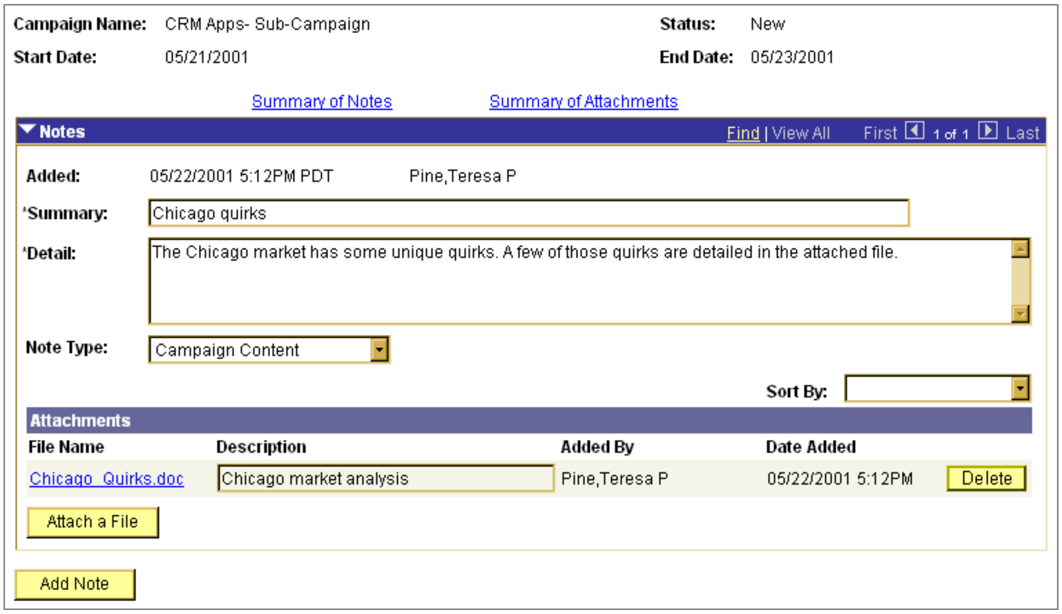
Attaching Notes to Campaigns

You can attach informational notes to your campaigns. You can associate attachments—such as text documents and image files—with your notes.

For more information about notes and attachments, see Adding Notes and Attachments in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Campaign Detail - Notes Details Page

Usage	Use the Campaign Detail - Notes Details page to attach informational notes to your campaigns.
Object Name	RA_CMPGN_NOTE
Navigation	Click Campaign Note on the Campaign Detail - Note Summary page.

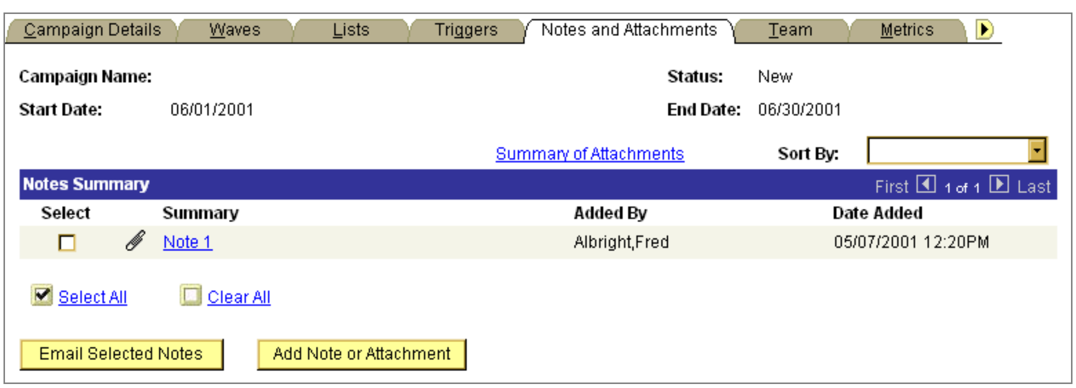


Campaign Detail - Notes Details page

For more information about notes and attachments, see Adding Notes and Attachments in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Campaign Detail - Notes Summary Page

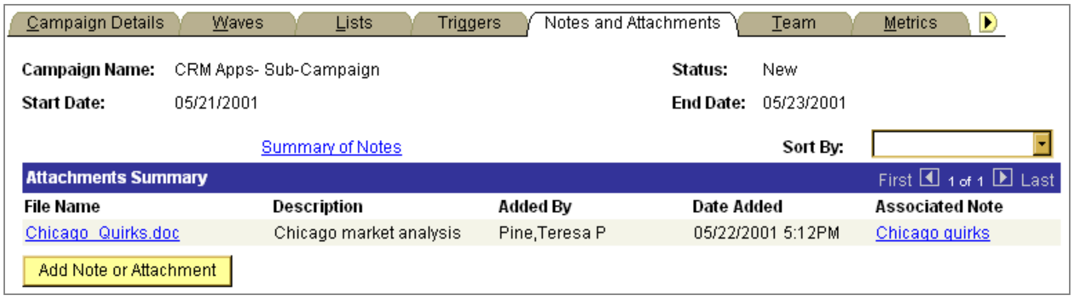
Usage	Use the Campaign Detail - Notes Summary page to view brief descriptions of your campaign notes, and to access those notes.
Object Name	RA_CM_NOTE_SUMRY
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail, Notes and Attachments**



Campaign Detail - Campaign Notes Summary page

For more information about notes and attachments, see Adding Notes and Attachments in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Campaign Detail - Attachments Summary Page



Campaign Detail - Campaign Attachments Summary page

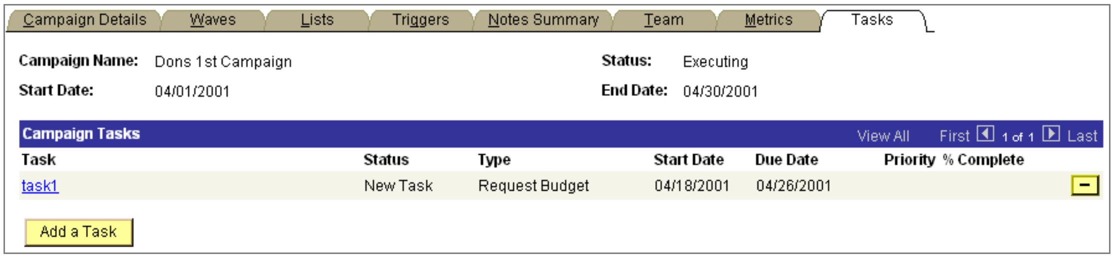
For more information about notes and attachments, see Adding Notes and Attachments in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Defining Campaign Tasks

Campaign tasks are those activities that comprise a campaign. Tasks may include such activities as designing advertisements, distributing brochures, and polling members of your target audience.

Campaign Detail - Campaign Tasks Page

Usage	Use the Campaign Detail - Campaign Tasks page to define campaign tasks.
Object Name	RA_CMPGN_TASK
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail, Campaign Tasks**
Prerequisites	Create a campaign.
Access Requirements	Enter a business unit and a campaign ID.



Campaign Detail - Campaign Tasks page

Key Fields

Campaign Name	Descriptive code that identifies the campaign.
Status	Position of the campaign in its life cycle.
Start Date	Date when the campaign begins.
End Date	Date when the campaign ends.

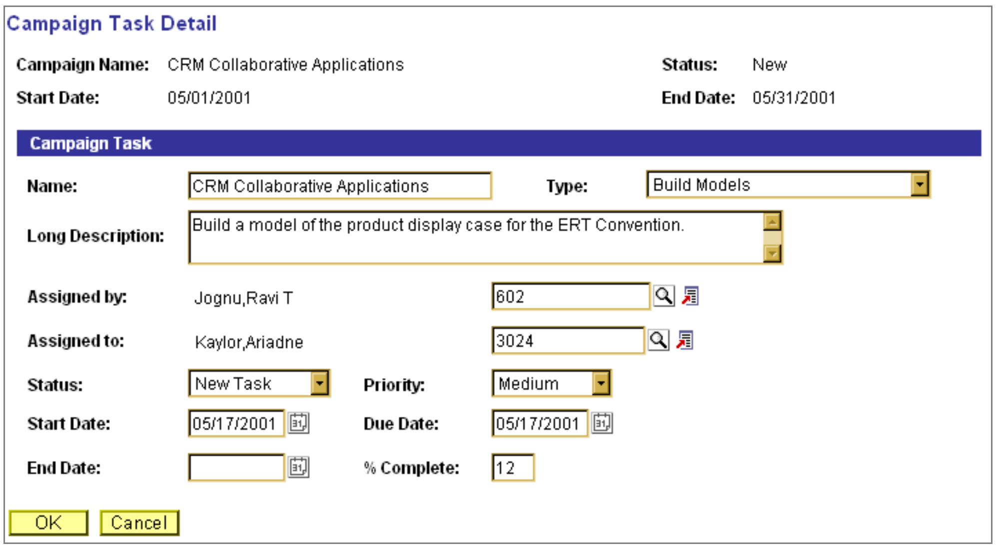
Campaign Tasks Grid

Task	Descriptive code that identifies the task. Click the task description hyperlink to access the detail information.
Status	Position of the task in its life cycle.
Type	The type of task.
Start Date	Date when the task is to begin.
Due Date	Date when the task is to be completed.
Priority	Urgency of the task. You have three options: • ***High*** • ***Medium*** • ***Low***
% Complete (percent complete)	Proportion of the task that has already been completed, expressed as a percentage of the entire task.
Add a Task	Click the **Add a Task** button to access the Campaign Detail - Campaign Task Detail page, where you can create a new task .

For more information about tasks, see Defining Campaign Tasks.

Campaign Detail - Campaign Task Detail Page

Usage	Use the Campaign Detail - Campaign Task Detail page to create and update campaign tasks.
Object Name	RA_CM_TASK_SEC
Navigation	• Click a task on the Campaign Detail - Campaign Tasks page. • Push the Add a Task button on the Campaign Detail - Campaign Tasks page.
Prerequisites	Create a campaign.
Access Requirements	Enter a business unit and a campaign ID.



Campaign Detail - Campaign Task Detail page

Key Fields

Campaign Name Descriptive code that identifies the campaign.

Status Position of the campaign in its life cycle.

Start Date Date when the campaign begins.

End Date Date when the campaign ends.

Campaign Task Region

Name Enter a descriptive code to identify the task.

Type Select a type. Indicates the general goal of the task.

Long Description Enter a complete description of the task.

Assigned by Select the user who assigned the task.

Assigned to	Select a user to execute the task. The user must be a member of the campaign team. **Note.** The system will not permit you to assign a task to a person who is not a member of the campaign team.
Status	Select the position of the task in its life cycle.
Priority	Select the urgency of the task. You have three options: • ***High*** • ***Medium*** • ***Low***
Start Date	Enter the date when the task is to begin.
Due Date	Enter the date when the task is to be completed.
End Date	Enter the date when the task is actually completed.
% Complete (percent complete)	Enter the proportion of the task that has already been completed, expressed as a percentage of the entire task.

For more information about tasks, see Defining Campaign Tasks.

Assigning Campaign Team Members

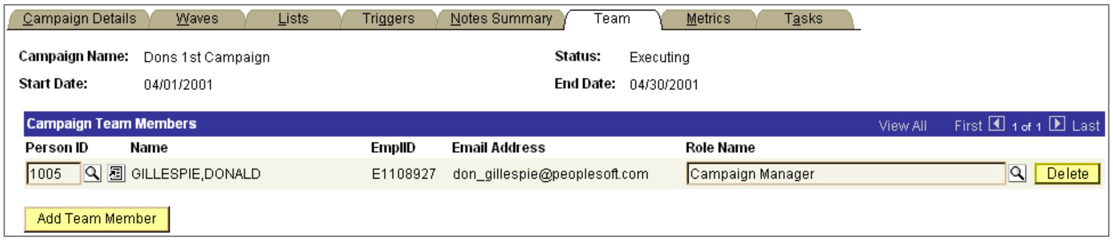
PeopleSoft CRM Marketing helps you manage the activities of campaign team members. You can route messages to people, based on their roles in a campaign. You may also maintain team member information for reporting purposes.

For more information about team members, see Understanding Campaign Teams.

Campaign Detail - Team Members Page

Usage	Use the Campaign Detail - Team Members page to assign people to campaign teams.
Object Name	RA_TEAM
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail, Team Members**
Prerequisites	Define persons. **For more information** about defining persons, see Defining Persons.

Access Requirements	Enter a business unit and a campaign ID.



Campaign Detail - Team Members page

Key Fields

Campaign Name Descriptive code that identifies the campaign.

Status Position of the campaign in its life cycle.

Start Date Date when the campaign begins.

End Date Date when the campaign ends.

Campaign Team Members Grid

Person ID Enter the person ID of each person to be included in the campaign team.

For more information about persons, see Defining Persons.

Name The person's name.

EmplID (employee ID) The person's employee identification code.

Email Address The person's email address.

Role Name Assign a role to each person.

Note. You define roles on the Roles page.

For more information about roles, see Understanding Roles.

Add Team Member Clicking this button opens a row of data in which to enter team member information.

Attaching Lists to Campaigns

You can maintain lists of people whom you hope to influence with your campaigns. You can combine multiple lists to target with a single campaign. You can eliminate duplicate names from a combined list.

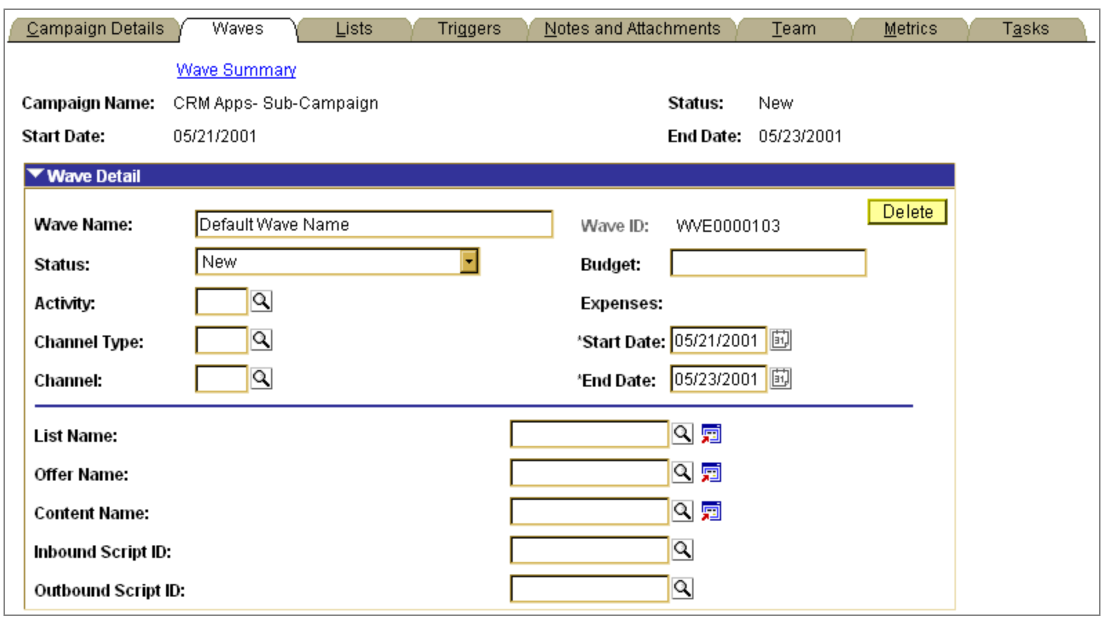
For more information about creating and maintaining lists, see Using Lists.Creating Waves

A wave is a discrete effort to influence a target audience. Campaigns are composed of one or more waves.

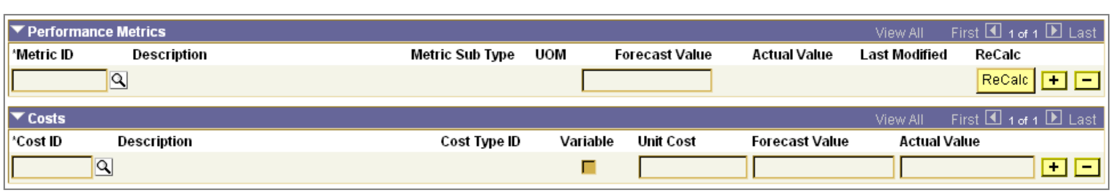
For more information about waves, see the Understanding Campaigns and Waves chapter.

Campaign Detail – Waves Page

Usage	Use the Campaign Detail – Waves page to define waves.
Object Name	RA_CMPGN_WAVE_DTL
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail, Wave Detail**
Prerequisites	Define a campaign.
Access Requirements	Enter a business unit and a campaign ID.



Campaign Detail - Waves page (page 1 of 2)



Campaign Detail - Waves page (2 of 2)

Wave Detail Header Region

Wave Summary	Click **Wave Summary** to access the Campaign Detail - Waves page, where you can access waves and attach additional waves to the campaign.
Campaign Name	The descriptive name of the campaign to which the wave belongs.
Status	Position of the wave in its life cycle.
Start Date	Enter the date when the campaign begins.
End Date	Enter the date when the campaign ends.

Wave Detail Region

Wave Name	Enter a descriptive name to identify the wave. **Note.** Wave names do not need to be unique. However, duplicate wave names may confuse users.
Wave ID	The code that uniquely identifies the wave.
Status	Position of the wave in its life cycle.
Activity	The mechanism (or tactic) by which you convey your marketing message. For example, you might use the activity ***Print,*** or ***Broadcast.***
Channel Type	The medium by which you convey your marketing message. For example, in a broadcast campaign you might use the channel types radio and television.
Channel	The outlet through which you convey your marketing message. For example, in a radio campaign you might use the channels National Public Radio and BBC Radio.
Budget	Enter the amount of money allocated for the wave. The system accepts standard monetary formats, such as USD10,000. **Note.** You establish the campaign currency on the Campaign Detail - Campaign Details page.
Expenses	Money already spent on the campaign.
Start Date	Date when the wave begins. Start date cannot precede Campaign Start date.
End Date	Date when the wave ends. End date cannot exceed Campaign End date.
List Name	Select the list that you want to attach to the wave.
Offer Name	Select the offer that you want to attach to the wave.

Content Name	Select the content that you want to attach to the wave.
Inbound Script ID	The branch script to be executed if a customer or employee contacts your company.
Outbound Script ID	The branch script to be executed if your company contacts a customer or employee.

Note. You can execute branch scripts within various PeopleSoft CRM applications, not including PeopleSoft CRM Marketing. In PeopleSoft CRM Marketing, you can associate branch scripts with waves for organizational purposes, but you cannot execute branch scripts.

For more information about branch scripts, see Defining Branch Scripts in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Performance Metrics Grid

In the Performance Metrics grid, you select the terms by which to measure campaign performance.

Metric ID	Select the metric by which to measure wave performance.
Description	Brief description of the metric.
Metric Sub Type	Qualifies the metric as measuring one of two aspects of the wave: performance or cost.
UOM (unit of measure)	Unit of measure in which the metric is calculated.
Forecast Value	Enter the result that you expect the wave to produce.
Actual Value	The result that the wave actually produces. The system populates this field with data from various tables, and sometimes from multiple applications (such as PeopleSoft CRM Sales and PeopleSoft CRM Call Center).
Last Modified	Date and time when the metric was last updated.
ReCalc (recalculate)	Recalculate the metric. **Note.** The system recalculates metrics *only* when you click the **ReCalc** button, for the sake of performance.

Costs Grid

In the Costs grid, you enter wave costs.

Cost Metric ID	Enter the code that uniquely identifies the category of expenses to be measured.
Description	Brief description of the metric.
Cost Type ID	The code that uniquely identifies the main purpose of the expense.

Variable Defines the cost type as either variable or fixed.

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

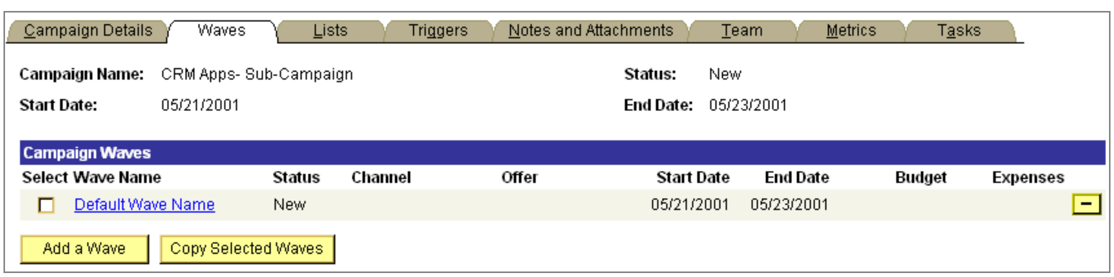
Note. This field is editable only when you have selected Variable.

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

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

Campaign Detail - Waves Page

Usage	Use the Campaign Detail - Waves page to access waves and attach additional waves to the campaign.
Object Name	RA_CM_WAVE_SUMRY
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail**
Prerequisites	Define a wave.
Access Requirements	Enter a business unit and a campaign ID.



Campaign Detail - Waves page

Waves Header Region

Campaign Name Descriptive code that identifies the campaign.

Status Position of the campaign in its life cycle.

Start Date Date when the campaign begins.

End Date Date when the campaign ends.

Campaign Waves Grid

Select	Select the **Select** check box next to waves to be cloned.
Wave Name	Click a campaign's wave name to access the Wave Detail page, where you can define additional wave attributes for the selected wave.
Status	Position of the wave in its life cycle.
Channel	Specific medium by which the wave will be conveyed.
Offer	Identifies special terms of sale for specified products or services.
Start Date	Date when wave begins.
End Date	Date when wave ends.
Budget	Money allocated for campaign.
Expenses	Money already spent on campaign.
Add a Wave	Click the **Add a Wave** button to create a new wave within the current campaign.
Clone Selected Waves	Click the **Clone a Wave** button to make copies of all selected waves. You select waves by selecting the **Select** check box.

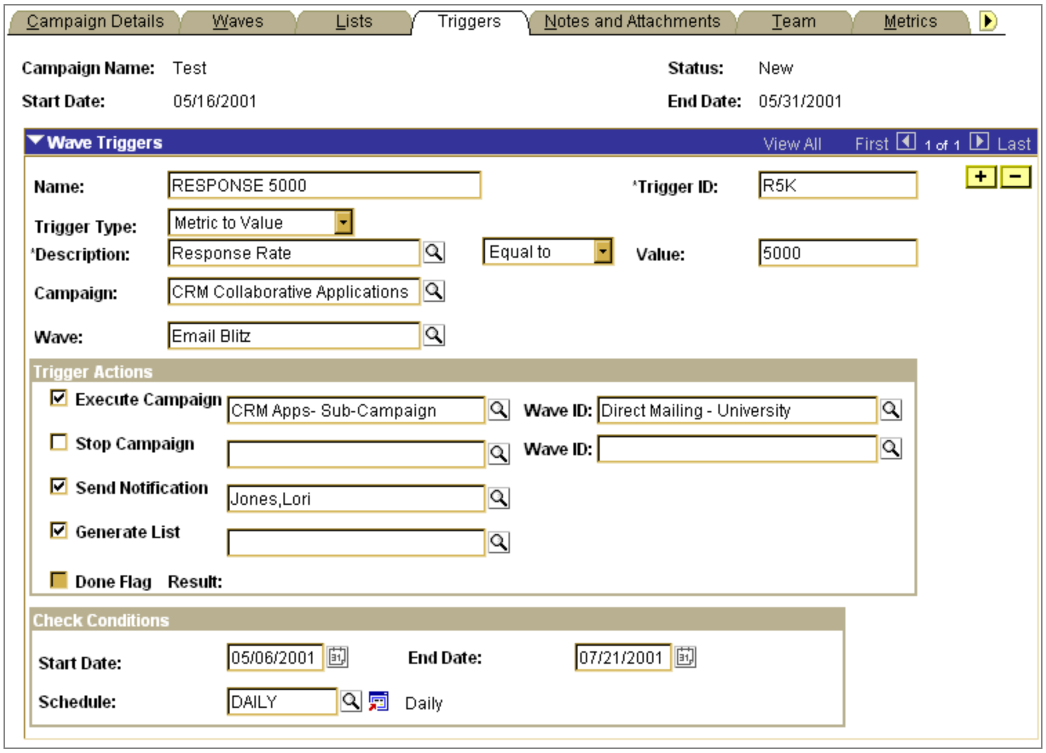
Setting Up Campaign Triggers

You use campaign triggers to determine when the system starts or stops a campaign or wave. For example, you might build the trigger to stop a wave on a certain date.

For more information about triggers, see Understanding Campaign Triggers.

Campaign Detail – Triggers Page

Usage	Use the Campaign Detail – Triggers page to define triggers.
Object Name	RA_CM_TRIGGER_DTL
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail, Triggers**
Prerequisites	Create a campaign.
Access Requirements	Enter a business unit and a campaign ID.



Campaign Detail - Triggers page

Triggers Header Region

Campaign Name Descriptive code that identifies the campaign.

Status Position of the campaign in its life cycle.

Start Date Date when the campaign begins.

End Date Date when the campaign ends.

Wave Triggers Region

Name Enter a descriptive name for the trigger to be created.

Trigger ID The code that identifies the trigger.

Trigger Type Select the criterion that determines how the system determines when to execute action requests. Depending on your trigger type selection, different fields appear in the rest of the **Wave Triggers** Region.

You have three choices of trigger type:

Date and Time: System initiates campaign events on specified dates and times.

Metric to Metric: System initiates campaign events when two metric results align as defined.

Metric to Value: System initiates campaign events when a metric result matches a fixed amount.

For more information about trigger types, see Understanding Trigger Types.

The system displays fields on the Campaign Detail - Triggers page under the following conditions:

Trigger Type Selected	***Fields Displayed***
Date and Time	• ***Date*** • ***Time***
Metric to Metric	• ***Description*** (on both sides of the operator field) • ***Campaign*** (on both sides of the operator field) • ***Wave*** (on both sides of the operator field) • ***Operator*** (unlabeled field)
Metric to Value	• ***Description*** (on the left side of the operator field) • ***Campaign*** (on the left side of the operator field) • ***Wave*** (on the left side of the operator field) • ***Operator*** (unlabeled field) • ***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.***

Description (left side of operator field)

Select the performance metric to compare to the performance metric on the right side of the operator.

	Examples of **Description** values include ***Cost per Lead, No. of Quotes*** (number of quotes), and ***ROI*** (return on investment). **Note.** The system displays the **Description** field on the left side of the operator field only when you select either the trigger type ***Metric to Metric*** or the trigger type ***Metric to Value.***
Campaign (left side of operator field)	Select the campaign to compare to the campaign on the right side of the operator. **Note.** The system displays the **Campaign** field on the left side of the operator field only when you select either the trigger type ***Metric to Metric*** or the trigger type ***Metric to Value.***
Wave	Select the wave to compare to the wave on the right side of the operator. **Note.** The system displays the **Wave** field on the left side of the operator field only when you select either the trigger type ***Metric to Metric*** or the trigger type ***Metric to Value.***
Operator (unlabeled field)	Select the operator by which to compare the metric on the left side of the operator to the metric on the right side of the operator. You have six options: ***Equal to, Greater than, Greater than or Equal to, Less than, Less than or Equal to,*** and ***Not Equal to.*** **Note.** The following four operators are reserved for future use: ***Divide, Minus, Multiply,*** and ***Plus.*** **Note.** The system displays the operator field only when you select either the trigger type ***Metric to Metric*** or the trigger type ***Metric to Value.***
Description (right side of operator field)	Select the performance metric to compare to the performance metric on the left side of the operator. **Note.** The system displays the **Description** field on the right side of the operator field only when you select the trigger type ***Metric to Metric.***
Campaign (right side of operator field)	Select the campaign to compare to the campaign on the left side of the operator. **Note.** The system displays the **Campaign** field on the right side of the operator field only when you select the trigger type ***Metric to Metric.***
Wave (right side of operator field)	Select the wave to be compared to the wave on the left side of the operator.

	Note. The system displays the **Wave** field on the right side of the operator field only when you select the trigger type ***Metric to Metric.***
Value	Enter the value to compare to the metric result on the left side of the operator. **Note.** The system displays the **Value** field only when you select the trigger type ***Metric to Value.***

For more information about triggers, see Understanding Campaign Triggers.

Trigger Actions Region

Execute Campaign	Select the check box next to the **Execute Campaign** field to execute a campaign when the trigger condition is true. Select the campaign to execute in the **Execute Campaign** field. Optionally, select the wave ID within the selected campaign in which the execute selection is acted upon.
Stop Campaign	Select the check box next to the **Stop Campaign** field to stop a campaign when the trigger condition is True. Select the campaign to stop in the **Stop Campaign** field. Optionally, select the wave ID within the selected campaign in which the stop selection is acted upon.
Send Notification	Select the check box next to the **Send Notification** field to notify a person when the trigger condition is true. Select the person to notify in the **Send Notification** field.
Generate List	Select the check box next to the **Generate List** field to generate a list when the trigger condition is true. Select the list to generate in the **Generate List** field. You generate the list by scheduling the List Generation Application Engine program to be run by the processor. List generation involves asynchronous processing.
Done Flag	The system selects the **Done Flag** check box after it executes the trigger successfully.
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.

Check Conditions

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

Schedule	Select the schedule that determines when the system checks whether trigger conditions have been met.

CHAPTER 6

Creating Campaign Content

Campaign content is all the material that you produce to support a campaign.

Campaign content 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. You associate content with campaign waves so that you can manage the production and dispersion of that content as part of your overall campaign. You can access actual content through PeopleSoft CRM 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
- Give-away items
- Event banners
- Scripts for promotional presentations
- Market research summaries
- Web pages

Understanding Content Types and Subtypes

Types and subtypes help you categorize your content.

PeopleSoft CRM Marketing is delivered with various content types and subtypes. You can define additional content types and subtypes on the Content Types page and Content Subtypes page.

For more information about defining content types and subtypes, see the Setting Up PeopleSoft CRM Marketing chapter.

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.*

The following content subtypes are delivered with your system:

Content Type	***Content Subtype***
Creative	Ad Creative
Creative	Image Suite
Creative	Iposter
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
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/Offer
Web	Web Page

Understanding Content Statuses

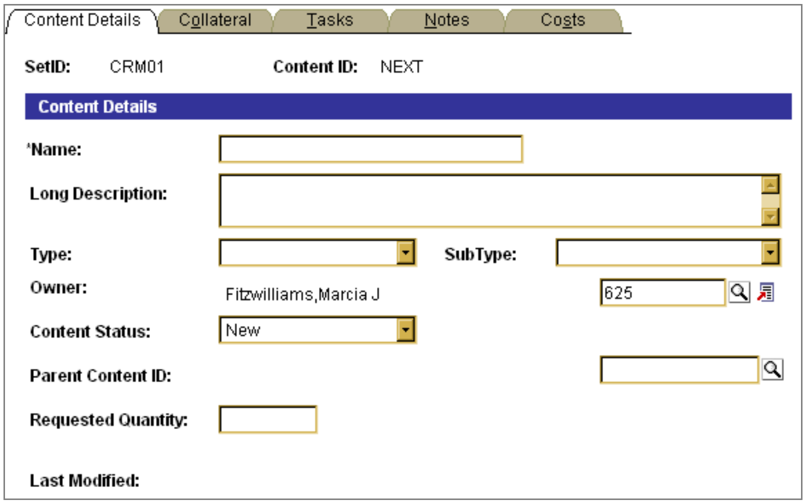
Content passes through a structured life cycle. At each stage in its life cycle, content has a *status*. Status changes must follow predefined *status rules;* you can use the status rules that are delivered with your system, or you can redefine status rules on the Status Rules page.

For more information about defining status rules, see the Setting Up PeopleSoft CRM Marketing chapter.

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 wave.
Planning	Content was approved for use in this campaign wave and is now in development.
Completed	Content is defined and ready for use.
Expired	Content is no longer used.

Manage Content - Content Details Page

Usage	Use the Manage Content - Content Details page to define content.
Object Name	RA_CONTENT_DETAIL
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Manage Content**
Access Requirements	Enter a setID and a content ID.



Manage Content - Content Details page

Content Header Region

SetID	The setID in which the content resides.
Content ID	The code that uniquely identifies the content.

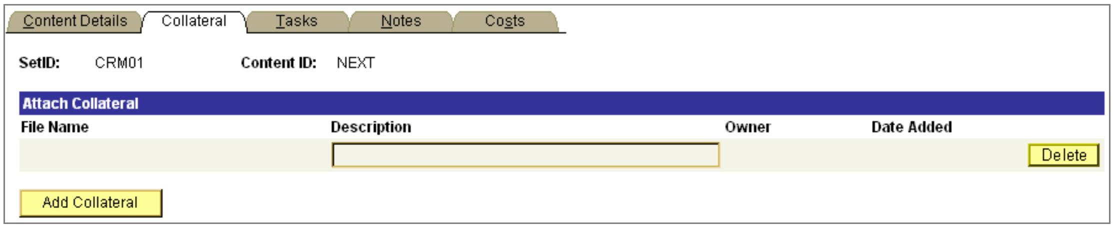
Content Details Region

Name	Enter a brief descriptive name for the content.
Long Description	Enter a complete description of the content.
Type	Select the content type.
SubType	Select the content subtype.
Content Status	Identify the content’s position in its life cycle.
Parent Content ID	If the content has a parent, select that parent here.
Requested Qty (requested quantity)	Enter the quantity of the content to be produced.
Last Modified	Date when the content was last updated.

Manage Content - Collateral Page

Usage	Use the Manage Content - Collateral page to associate collateral files (brochures, design specifications, and so on) with content.
Object Name	RA_CONTENT_ATCH
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Manage Content, Collateral**
Prerequisites	Create collateral files.

Access Requirements	Enter a setID and a content ID.



Manage Content - Collateral page

Collateral Header Region

SetID The setID in which the content resides.

Content ID The code that uniquely identifies the content.

Attach Collateral Region

File Name The name of the file attached to the content.

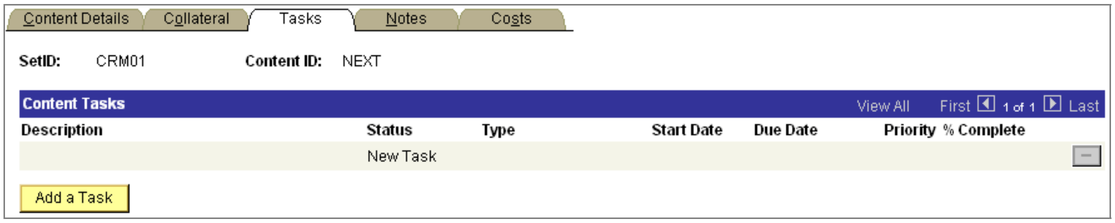
Description Enter a description of the file attached to the content.

Owner The person responsible for the file attached to the content.

Date Added Date when the file was attached to the content.

Manage Content - Tasks Page

Usage	Use the Manage Content - Tasks page to associate tasks with content.
Object Name	RA_CONT_TASK_SUMM
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Manage Content, Tasks**
Prerequisites	Define tasks.
Access Requirements	Enter a setID and a content ID.



Manage Content - Tasks page

Tasks Header Region

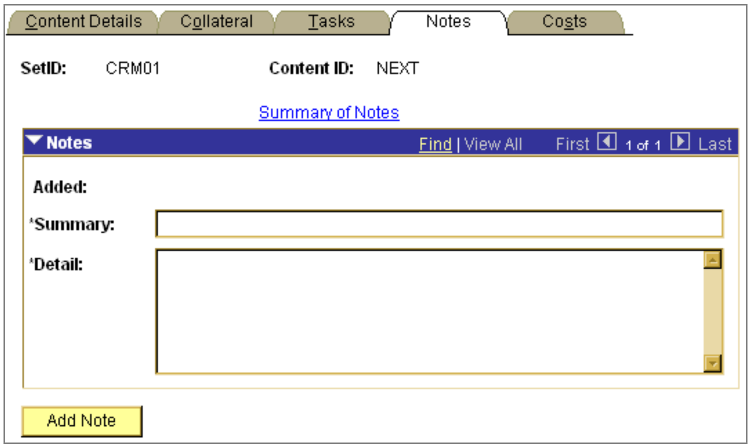
SetID	The setID in which the content resides.
Content ID	The code that uniquely identifies the content.

Content Tasks Grid

Description	Description of the task attached to the content.
Status	Position of the task in its life cycle.
Type	The task type.
Start Date	The date when the task begins.
Due Date	The date when the task is due to be completed.
Priority	The relative urgency of the task.
% Complete (percent complete)	Portion of the task that you have completed.

Manage Content - Notes Page

Usage	Use the Manage Content - Notes page to write notes and attach them to content.
Object Name	RA_CONTENT_NOTE
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Manage Content, Notes**
Access Requirements	Enter a setID and a content ID.



Manage Content - Notes page

Notes Header Region

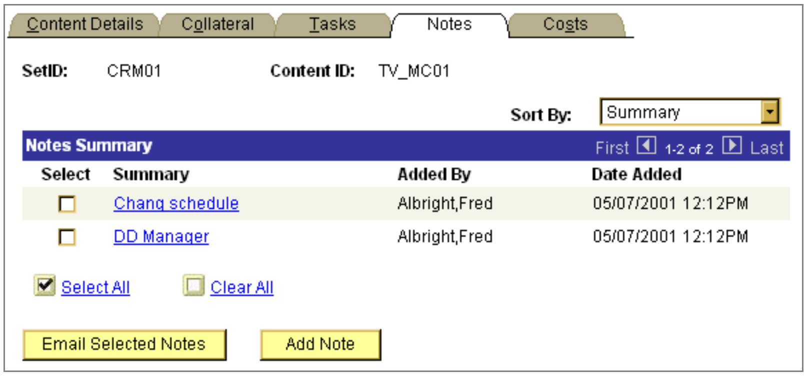
SetID	The setID in which the content resides.
Content ID	The code that uniquely identifies the content.
Summary of Notes	Click **Summary of Notes** to access the 1

Notes Region

Added	Date and time when the note was added.
Summary	Enter a brief summary of the note.
Detail	Enter the main text of the note.

Manage Content - Notes Summary Page

Usage	Use the Manage Content - Notes Summary page to view brief descriptions of your content notes and to access those notes.
Object Name	RA_CNT_NOTE_SUMRY
Navigation	Click Notes Summary on the Manage Content - Notes page.
Access Requirements	Enter a setID and a content ID.



Manage Content - Notes Summary page

Notes Summary Header Region

SetID The setID in which the content resides.

Content ID The code that uniquely identifies the content.

Sort By Select the attribute by which to sort the notes. You have three choices: ***Summary, Added By,*** and ***Date Added.***

Notes Summary Grid

Summary Click the summary of a note to access the Manage Content - Notes page, with the selected note displayed.

Added By The user who created the note.

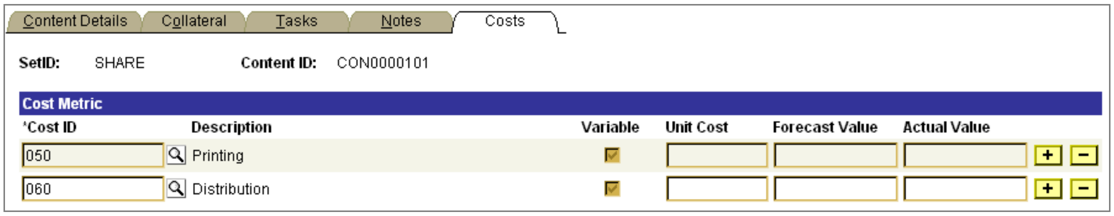
Date Added Date and time when the note was created.

You can send notes to interested parties by email or worklist note. To send notes, select the **Select** check boxes of those notes, and click the **Email Selected Notes** button. (Click **Select All** to select all of the notes, or **Clear All** to select none of the notes.) You will be taken to the Send Notification page to set up the email message or worklist note.

For more information about the Send Notification page, see Send Notification Page.

Manage Content - Costs Page

Usage	Use the Manage Content - Costs page to enter the costs of creating content.
Object Name	RA_CONTENT_COST
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Manage Content, Costs**
Access Requirements	Enter a setID and a content ID.



Manage Content - Costs page

Costs Header Region

SetID	The setID in which the content resides.
Content ID	The code that uniquely identifies the content.

Cost Metric Region

Cost ID	Select the cost type that describes the cost.
Description	A brief description of the cost type.
Variable	Determines whether the content's cost is variable or fixed. This is determined by your choice of cost metric type.
Unit Cost	Enter the cost of one unit of the content.
Forecast Value	Enter the expected cost of all the content.
Actual Value	Enter the actual cost of all the content.

C H A P T E R 7

Using Offers

Promotional offers are an important part of many marketing campaigns. You can create offers in PeopleSoft CRM Marketing and associate them with campaign waves.

Understanding Offers

A PeopleSoft CRM Marketing *offer* represents all that you offer to your customers. An offer includes the following elements and attributes:

Product selection	The products offered for sale as part of an offer.
Price set	The prices of the products offered for sale, including applied discounts and extra charges.
Owner	The user who is primarily responsible for an offer.
Offer status	The position of an offer in its life cycle.
Start date	Date when an offer becomes valid.
End date	Date when an offer ceases to be valid.

Understanding Price Sets

A price set is the specifications for price adjustments—discounts or extra charges applied to standard prices.

You must associate one price set with every offer, even if you are not applying discounts or extra charges to your standard prices.

Note. To offer only unadjusted prices, select the price set called *standard.*

You can populate PeopleSoft CRM Marketing with price sets in two ways:

- Set up PeopleSoft CRM Marketing to subscribe to the price set messages that you publish using PeopleSoft Order Management.
- Import price sets from third-party applications.

Note. Price sets in PeopleSoft CRM Marketing that you create from price sets in PeopleSoft Order Management are pared-down versions of PeopleSoft Order Management price sets. PeopleSoft Order Management price sets are more complex than PeopleSoft CRM price sets.

If you import price sets from third-party applications, you must define products and items in PeopleSoft CRM Marketing.

Important! If products and items are not defined, your price sets will not function properly.

For more information about defining products, see the Setting Up Products chapter in the *PeopleSoft CRM Application Fundamentals PeopleBook*. **For more information** about setting up items, see the Defining Items” chapter in the *PeopleSoft CRM Application Fundamentals PeopleBook*.

Replicating Price Sets from PeopleSoft Order Management

If you have PeopleSoft Order Management installed, you can create complex price sets there, then replicate them in PeopleSoft CRM Marketing.

To replicate price sets from PeopleSoft Order Management:

1. Define price sets in PeopleSoft Order Management.
2. Publish price set messages from PeopleSoft Order Management, using the PRICE_SET application messaging EIP.
3. Subscribe price set messages to PeopleSoft CRM Marketing, using the PRICE_SET application messaging EIP.

Important! PeopleSoft CRM Marketing replicates only price sets that have product or product group pricing rule keys.

For more information about application message EIPs, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Importing Price Sets from Third-Party Applications

Before you can use price sets that were created in a third-party application, you need to extract the price sets to comma-delimited (.csv) files. Three types of price set extract files are required: Offer Details, Products and Price Breaks.

Extract file records must be laid out as follows:

Price Set - Offer Detail Extract Record Layout

Field Number	***Field Type***	***Maximum Field Length***	***Format***	***Notes***
1	Character	5		Set ID field. *
2	Character	10		Price Set ID field. **
3	Character	20		Promotion code. Optional.
4	Character	4		Source code. Default to OTHR.
5	Character	4		Discount type. Possible values are STD (standard), TIER (tier) and GIVE (give-away).
6	Character	8	YYYYMMDD	Start date.
7	Character	8	YYYYMMDD	End date.
8	Character	2		Price type. Possible values are P (extended price), Q (quantity), V (volume) and W (weight).
9	Character	4		Discount subtype. Possible values are PROD (product), PGRP (product group).
10	Character	18		Give-away product ID. Required for GIVE discount type.
11	Character	3		Give-away unit of measurement (UOM). Possible values are CS (case) and EA (each).
12	Character	1		Stop Search flag. N by default.
13	Character	1		Total Order flag. N by default.
14	Character	1		Offer by Request flag. N by default.

Price Set - Product Info Extract Record Layout

Field Number	***Field Type***	***Maximum Field Length***	***Format / Decimal Position***	***Notes***
1	Character	5		Set ID field. *
2	Character	10		Price Set ID field. **
3	Character	10		Product group ID.
4	Character	18		Product ID.
5	Character	3		Currency code.

6	Character	3		Unit of measure code. Possible values are CS (case) and EA (each).
7	Signed number	17	Includes up to four digits to the right of the decimal point.	Product list price.

Price Set - Price Break Info Extract Record Layout

Field Number	***Field Type***	***Maximum Field Length***	***Format / Decimal Position***	***Notes***
1	Character	5		Set ID field. *
2	Character	10		Price Set ID field. **
3	Character	10		Price break ID.
4	Signed number	17	4 decimal positions	High quantity.
5	Signed number	17	4 decimal positions	Low quantity.
6	Signed number	28	3 decimal positions	Discount amount. Amount should be negative.
7	Character	3		Currency code.
8	Character	3		Discount form. Possible values are PCT (percentage) and AMT (amount).
9	Character	3		Unit of measure code. Possible values are CS (case) and EA (each).

- Set ID, ** Price Set ID are key fields that tie the Price Set Product Info and Price Set Price Break Info extract files to the Price Set Offer Detail extract file. You can import price set extract files in any order. However, you must import one price set type at a time.

To import price sets from a third-party application:

1. Define price sets in the third-party application.
2. Generate price set extract files (.csv files).
3. Import the price set extract files (.csv files) into PeopleSoft CRM Marketing, using the Import Price Sets page.

Understanding Discount Types

A discount type is a designation that helps define the structure of a discount. There are three discount types:

Tiered Tiered discounts have tiers that are based on the number of units of a product or service purchased.

Standard Standard discounts are flat discounts. Customers receive the same discount, regardless of how many units of a product or service they buy.

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 service and charge full price for the actual purchase.

Understanding Tiered Discounts

Tiered discounts are discounts that vary according to the volume of products or services purchased.

Merchants generally offer greater discounts for higher numbers of units purchased to encourage larger purchases. For example, you might establish the following discount structure:

Number of Units Purchased	*Discount*
1-99	10%
100-249	12%
250-up	15%

Understanding Discount Subtypes

You can apply discounts either to products or to groups of products by selecting one of the following subtypes:

Discount Subtype	*Description*
Prod Group (product group)	Apply discount to product groups.
Product ID	Apply discount to individual products.

Using Offers

You attach one offer to each campaign wave, on the Campaign Detail - Wave Detail page. This helps you organize your waves. You can easily access an offer from the Campaign Detail - Wave Detail page by clicking the drill-down icon for that offer.

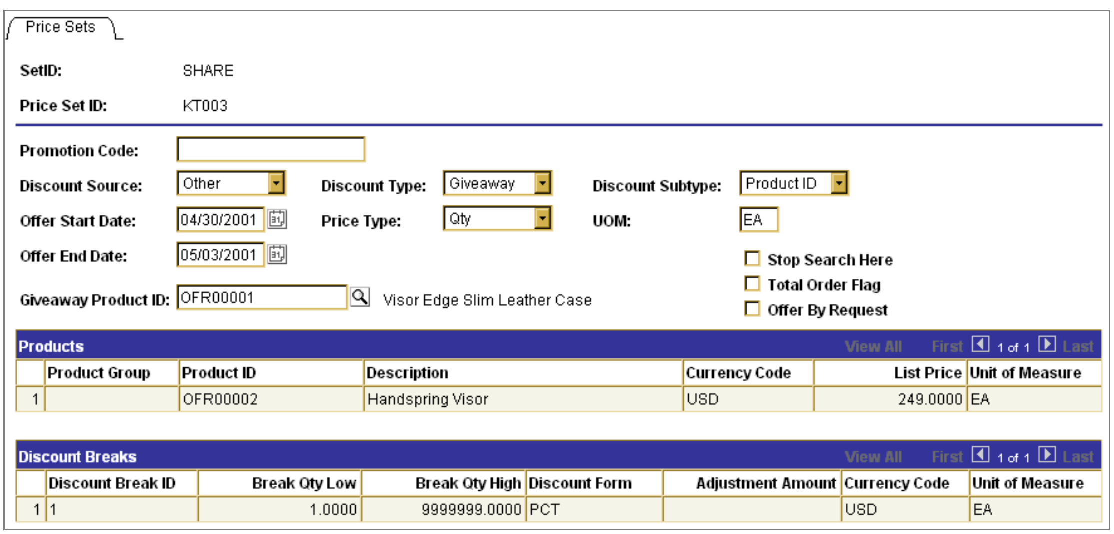
Understanding Offer Statuses

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 wave.
Planning	Offer was approved for use in this campaign wave, and is now in development.
Completed	Offer is defined and ready for use.

Price Sets Page

Usage	Use the Price Sets page to view price set information.
Object Name	RA_PRCSET_PRCBREAK
Navigation	**Home, Establish Marketing Campaigns, Establish Marketing Campaigns, Inquire, Price Sets**
Access Requirements	Enter a setID and a price set ID.



Price Sets page

Price Sets Header Region

SetID	The setID in which the price set resides.
Price Set ID	The code that uniquely identifies the price set.

Price Sets Region

Promotion Code	The code that uniquely identifies the promotional offer.
Discount Source	The source of price set . You have two options: ***Other:*** Imported from a third-party application. ***PS OM:*** Created from PeopleSoft Order Management price sets, using application messaging.
Discount Type	Discount type.
Discount Subtype	Discount subtype.
Offer Start Date	The date when the price set becomes effective.
Offer End Date	The date when the price set ceases to be effective.
zPrice Type	The price type, the basis of discounts. For example, if you select ***Volume,*** the system calculates discounts based on the volume of products purchased. You have four options: ***Prc*** (price) ***Qty*** (quantity) ***Volume*** ***Weight***
UOM (unit of measure)	The unit of measure by which the system applies discounts.
Giveaway Product ID	Giveaway product. For the ***Giveaway*** discount type only.
Stop Search Here	Field reserved for future use.
Total Order Flag	Field reserved for future use.
Offer By Request	Field reserved for future use.

Products Grid

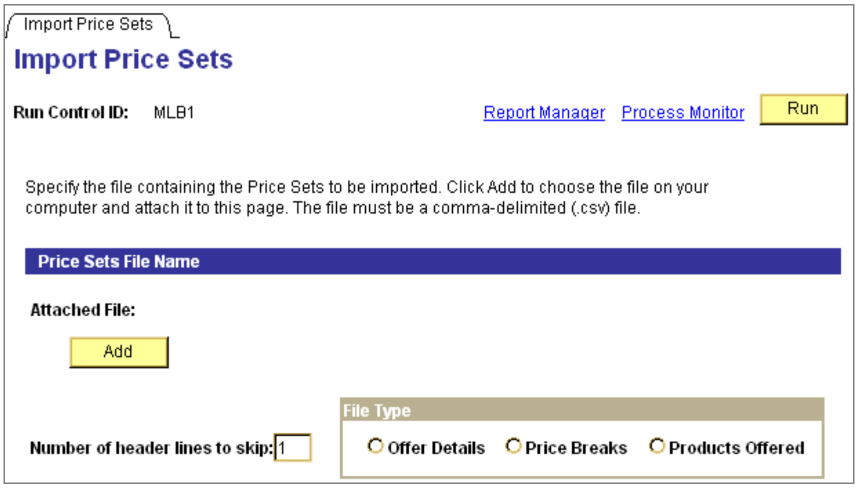
Product Group	The product group of the product to include in the price set.
Product ID	The product to include in the price set.
Currency Code	The code of the currency in which to define the list price.
List Price	The list price. This is the standard price of the product, before price breaks are applied.
Unit of Measure	The unit of measure to which the product price applies.

Discount Breaks Grid

Discount Break ID	The code that uniquely identifies the discount break within the price set.
Break Qty Low (break quantity low)	The minimum number of units of the product that a customer must buy to receive the discount break.
Break Qty High (break quantity high)	The maximum number of units of the product that a customer can buy and still receive the discount break.
Discount Form	The means by which to calculate discounts: ***PCT*** (percentage) or flat ***Amt*** (amount).
Adjustment Amount	The amount to be discounted. **Note.** The adjustment amount represents either a percentage of the list price or a flat amount, based on your choice of discount form.
Currency Code	The currency in which to calculate discounts.
Unit of Measure	The unit of measure to which the discount applies.

Import Price Sets Page

Usage	Use the Import Price Sets page to import price sets from third-party applications into PeopleSoft CRM Marketing.
Object Name	RA_PRC_IMPORT_AE
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Process, Import Price Sets**
Prerequisites	Prepare a comma-delimited (.csv) file containing the price sets to be imported.
Access Requirements	Enter a run control ID.



Import Price Sets page

Import Price Sets Header Region

Run Control ID — The code that uniquely identifies the instance of importing price sets.

Price Sets File Name Region

Attached File — The file that contains the price sets to be imported.

Add — Click the **Add** button to add a price sets file to be imported.

Number of header lines to skip — Your .csv files may contain data that you do not want to import—such as file titles and information about the files' creators—especially in the first few rows of the files. If you want the system to refrain from importing the top rows of the .csv files, enter the number of rows to skip.

For example, if the first three rows of the .csv files contain only header information (such as the title *Price Sets for Spring Campaign* or the heading *Created by PeopleGear Creative Services),* enter the number three.

File Type Region

Select the type of price set that you are attaching to the offer. You have three options:

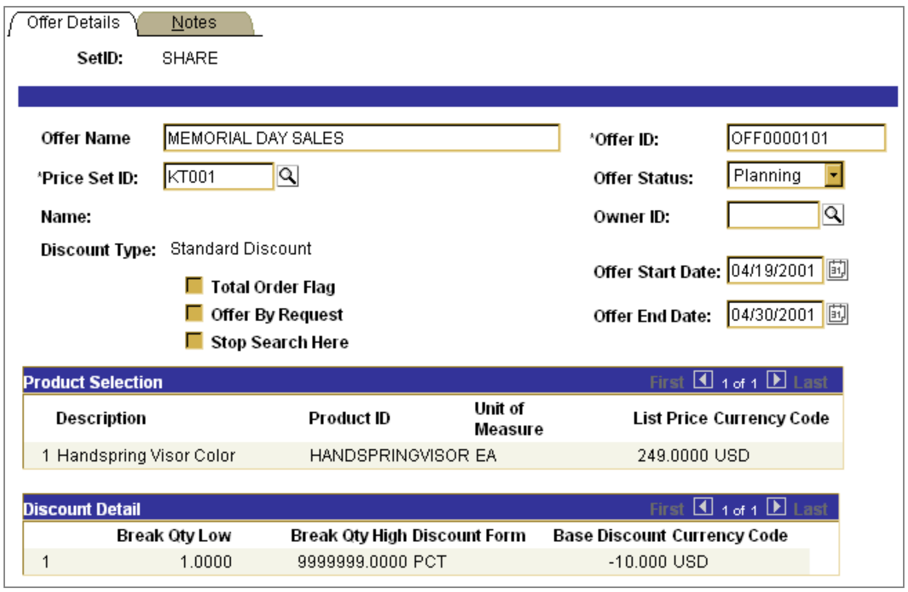
Offer Details — Descriptions of your offers.

Price Breaks — The discounts and extra charges that you apply to standard prices.

Products Offered — The products and services that you sell.

Campaign Offers - Offer Details Page

Usage	Use to define attributes that make up a campaign offer.
Object Name	RA_OFFER_DETAIL
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Maintain Offer**
Prerequisites	Create price sets.
Access Requirements	Enter a setID.



Campaign Offers - Offer Details page

Offer Details Header Region

SetID

Offer Details Region

Offer Name	Enter a descriptive name for the offer.
Offer ID	Enter a code to uniquely identify the offer.
Price Set ID	Select a price set to associate with the offer.
Offer Status	Enter the position of the offer in its life cycle
Name	The name of the owner of the offer.
Owner ID	Enter the user ID of the owner of the offer.
Discount Type	A designation that helps define the structure of a discount. The price set determines the discount type of an offer.

Total Order Flag Field reserved for future use.

Offer By Request Field reserved for future use.

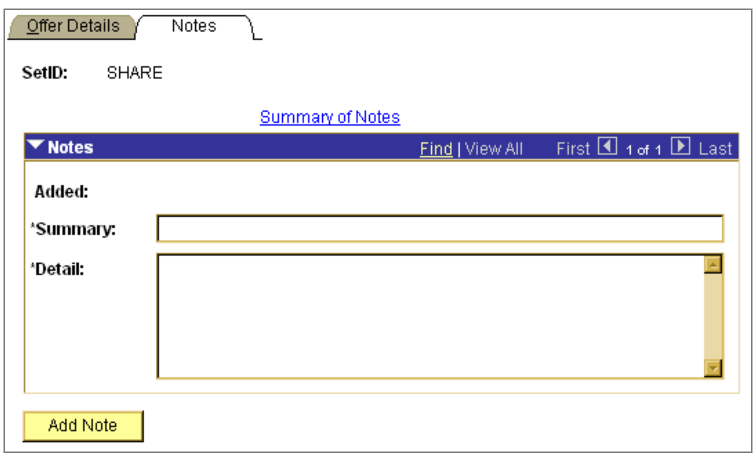
Stop Search Here Field reserved for future use.

Offer Start Date The date when the offer becomes valid.

Offer End Date The date when the offer ceases to be valid.

Campaign Offers - Notes Page

Usage	
Object Name	RA_OFFER_NOTE
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Maintain Offer, Notes**
Prerequisites	Define an offer.
Access Requirements	Enter a setID.



Campaign Offers - Notes page

Notes Header Region

SetID The setID in which the offer resides.

Notes Region

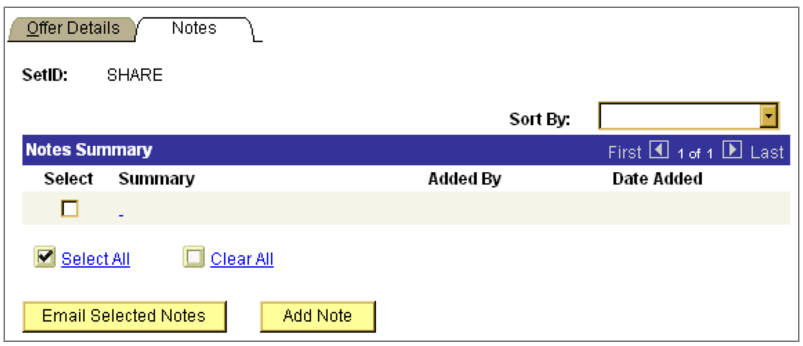
Added Date and time when the node was added.

Summary Enter a brief summary of the note.

Detail Enter the main text of the note.

Campaign Offers - Notes Summary Page

Usage	Use the Campaign Offers - Notes Summary page to view brief descriptions of your offer notes and to access those notes.
Object Name	RA_OFR_NOTE_SUMRY
Navigation	Click Summary of Notes on the Campaign Offers - Notes page.
Prerequisites	Define an offer.
Access Requirements	Enter a setID.



Campaign Offers - Notes Summary page

Notes Summary Header Region

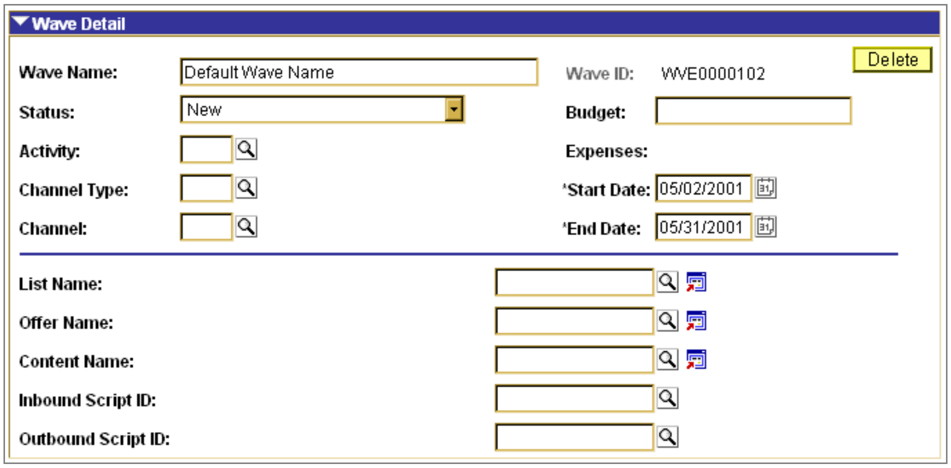
SetID	The setID in which the offer resides.
Sort By	Select the attribute by which to sort notes in the **Notes Summary** region: ***Added By, Date Added,*** or ***Summary.***

Notes Summary Region

The **Notes Summary** region contains a list of all the notes associated with the offer.

Select	Select the **Select** check box to select the note on the row.
Summary	A brief description of the note.
Added By	The user who created the note.
Date Added	The date on which the note was created.
Select All	Click **Select All** to select all of the notes to include in an email.
Clear All	

You can send notes to interested parties by email. To send notes, select the **Select** check boxes of those notes and click the **Email Selected Notes** button. (Click **Select All** to select all of the notes, or select **Clear All** to select none of the notes.) You will access the Send Notification page to set up the email message.



Associating offers with waves on the Campaign Detail - Waves page

CHAPTER 8

Using Lists

PeopleSoft CRM Marketing enables you to create and manage the lists of people whom you target with your marketing campaigns.

Understanding Lists

A list is a group of people whom you target with a marketing campaign.

You populate PeopleSoft CRM Marketing lists with existing CRM customers. You select customers using SQL queries. Once you have created a list, you can reuse that list in multiple campaigns and waves.

For more information about CRM customers, see the Managing Customer Information in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Lists have the following attributes:

Owner	The person who is responsible for a list.
Type	A designation that indicates how precisely a list defines a target audience.
Source	The mechanisms that you use to generate lists.
Count	The number of records (people) in a list.
Status	The position of a list in its life cycle.

Understanding List Types

List types are designations that indicate how precisely (or how broadly) your lists define your target audiences. PeopleSoft CRM Marketing list types correspond to those used by many marketing professionals.

List Type	*Description*
Segment	A broad target audience. Segments can represent regional, demographic, and other broadly-defined populations. Segments typically provide data for lists.
List	A target audience that is more precisely defined than a segment. You typically use a list as the target audience for a specific marketing campaign.

Understanding List Sources

You can generate lists from two sources:

List Source	*Description*
PS Query	When you select PS Query as your list source, you use a SQL query to select customers from your CRM database to comprise a new PeopleSoft CRM Marketing list. For example, you might create a list that included all customers whose last name begins with the letters *M* through *R* or all customers who have spent USD100, or more, in the last year. **For more information** about setting up role queries and query roles, see Advanced Query Options in the *PeopleSoft Query PeopleBook.*
Component Lists	When you select Component Lists as your list source, you combine existing PeopleSoft CRM Marketing lists into a new, larger list.

Understanding List Statuses

Lists pass through structured life cycles. At each stage in its life cycle, a list has a *status.* Status changes must follow predefined *status rules*, which are delivered with your system.

Note. You *cannot* redefine list status rules on the Status Rules page.

A list can pass through the following statuses:

Status	*Description*
New	List is new and list source information has not yet been provided.
Planning	Source information has been provided.
Scheduled	List will be generated at a future date.
Processing	List is being generated.
Complete	List has been successfully generated.
Active	List has been approved for use in campaigns.

Committed	List is in use by a campaign and cannot be modified.
Archived	List is archived and cannot be associated with any campaign until it is restored.

Understanding Control Groups

Control groups help you gauge the effectiveness of your marketing campaigns.

A control group is a portion of a target audience that is not exposed to a marketing campaign. You can create multiple control groups for a campaign. When you compare the behavior of control groups with that of a standard target audience, you gain unique insight into the effect of a campaign.

Example: Control Group

Suppose that you are promoting a new line of sleeping bags. You have a total list of 1,000 people in your initial target audience. (You are testing the campaign in a small, test market before launching it nationally.) Of that original 1,000, you select 100 to serve as a control group. Now your target audience consists of 900 people, and your control group consists of 100 people. You send your target audience a glossy mailer and an offer of 15 percent off the price of a new sleeping bag. Members of your control group receive no glossy mailer and no discount.

After the campaign ends, you compare the purchases of the two groups. People who received glossy mailers bought an average of two sleeping bags per household. Members of the control group bought an average of one sleeping bag per household. Sleeping bag sales appear to have doubled among those exposed to your campaign.

You authorize expanding the campaign to the national level.

Creating Control Groups

You use the Add a Control Group region of the Campaign Detail - Lists page to create control groups. Once generated, control groups are accessible from the Campaign Lists region of the Campaign Detail - Lists page, just like standard lists.

Define the following control group attributes:

Maximum Size	There are two ways to define the size of a control group: Fixed Amount: Flat amount. Simply enter the number of records/people to include in the control group. Percentage of Lists: Control group size is a percentage of all the members of all the lists from which you select your control group.

For example, suppose that you created three lists. You select two of those lists to include in your control group. The two selected lists each have 1,000 members, for a combined total of 2,000. You enter *10%* in the Percentage of Lists field. The system creates a control group with 200 members. (The system draws from the two different lists in the proportion that you specify in the Control Group Source(s) region. You might enter *50%* for each source, yielding 100 members from each selected list; or *75%* and *25%,* yielding 150 and 50, respectively; and so on.)

Minimum

The smallest control group size that you consider acceptable. If a list does not have enough members to fill a minimum-size control group, the system will not generate a control group.

Selection Type

Selection type determines how the system selects specific records/people to place in control groups. You have three options:

Every Nth: The system selects control group members at equal intervals. For example, when creating a control group of 200 members from a total list of 1,000, the system selects every fifth member of the total list.

Note. The system calculates the *N* intervals, based on the relative size of lists and control groups. You do not need to define *N.*

Random: The system selects control group members at random.

Top Down: The system selects control group members from the top of a list. That is, the system starts at the first row of a list and selects the record on that row first, then the record on each subsequent row, until it fills the control group.

Sources

A control group can contain records/people from multiple lists as long as each of those lists is associated with the campaign and the status of each list is *Active, Committed,* or *Archived.*

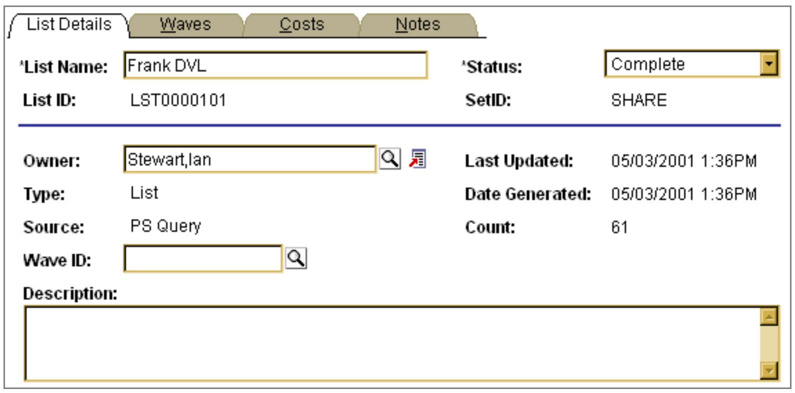
To draw control group members from one or more lists, enter the percentages of the total number to draw from those lists. The total percentage must equal 100.

Creating Lists

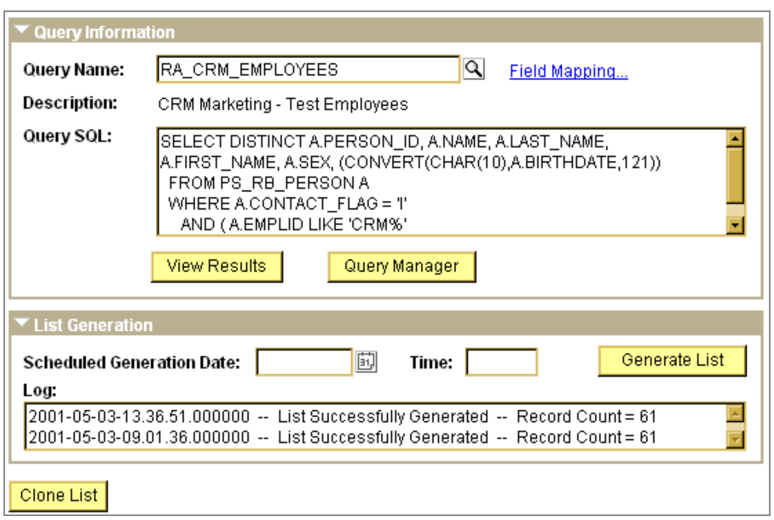
You create lists using the List Detail component.

List Detail - List Details Page

Usage	Use the List Detail - List Details page to
Object Name	RA_LIST_MAIN
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, List Detail**
Access Requirements	Enter a setID.



List Detail - List Details page (1 of 2)



List Detail - List Details page (2 of 2)

List Page Header Region

List ID	The code that uniquely identifies the list.
List Name	Enter a descriptive name for the list.
Status	Position of the list in its life cycle.
SetID	The setID in which the list resides.
Owner	Select the person who is responsible for the list.
Type	Select a list type: ***List*** or ***Segment.***
Source	Select a list source: ***Component Type*** or ***PS Query.***
Wave ID	Select the campaign waves with which to associate the list.
Last Updated	Most recent date when any source of data used to generate the list—including the query that populates the list—was modified.
Date Generated	Date and time when the list was last generated successfully.
Count	Number of records (people) in the list.
Description	Enter a detailed description of the list.

Query Information Region

The system displays the **Query Information** region only when you select the source ***PS Query*** when you initially define a list.

Note. You cannot change the source type of a list after you have created it.

Query Name	Select the query to use to generate the list.
Description	Brief description of the selected query.
Query SQL	The code copied from the selected query. **Note.** You cannot change copied code. It is read-only.
View Results	Push the **View Results** button to preview the results of your query.
Query Manager	Click the **Query Manager** button to access the PeopleSoft Query Manger. **For more information** about setting up role queries and query roles, see Advanced Query Options in the *PeopleSoft Query PeopleBook.*

List Components Region

The system displays the **List Components** region only when you select the source ***Component Lists*** when you initially define a list.

Note. You cannot change the source type of a list after you have created it.

List Name Select an existing list whose members you want to include in the new list.

Status The position of the selected list in its life cycle.

Source The source of the selected list.

Count The number of records/people in the selected list.

List Generation Region

Scheduled Generation Date Date when the system will generate the list.

Time Time when the system will generate the list.

Generate List Click the **Generate List** button to generate the list immediately.

Note. The system does not display the **Generate List** button when the status of a list is *New, Committed,* or *Archived.* You cannot generate a list under those conditions.

Log Information about generated lists. For each effort to generate a list, the log includes the date and time, the outcome of the effort, and the number of records (people) placed on the list.

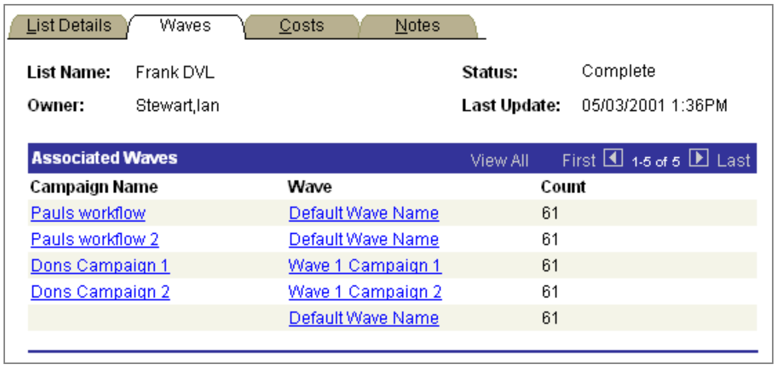
Clone List Click the **Clone List** button to create a duplicate of the current list. The system opens the duplicate list in a new window, leaving the current window unchanged.

The resulting new list will initially have the status *New,* regardless of the status of the source list. You will then need to generate the new list, using the process scheduler or by clicking the **Generate List** button, regardless of whether you have generated the source list.

List Detail - Waves Page

Usage	Use the List Detail - Waves page
Object Name	RA_LIST_WAVES
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, List Detail, Waves**

Prerequisites	Create a list.
Access Requirements	Enter a list ID.



List Detail - Waves page

List Detail - Waves Page Header Region

List Name The descriptive name of the list.

Owner The person who is responsible for the list.

Status The position of the list in its life cycle.

Last Update Most recent date when any source of data used to generate the list—including the query that populates the list—was modified.

Associated Waves Grid

Campaign Name The descriptive name of the campaign to which a wave that is associated with the list belongs.

Click the campaign name to access the Campaign Detail - Campaign Details page with the campaign displayed.

Wave A wave with which the list is associated.

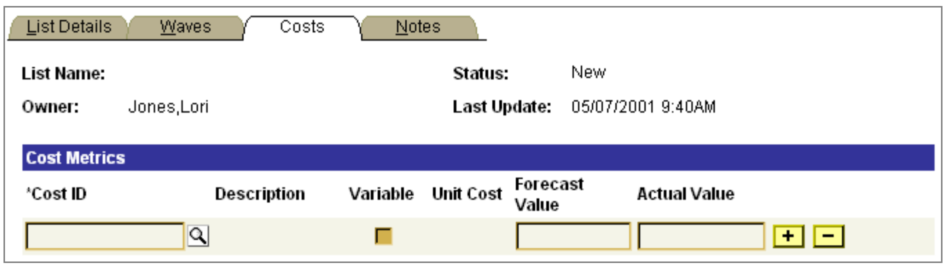
Click the wave name to access the Campaign Detail - Wave Details page with the wave displayed.

Count The number of records (people) in the list.

Note. The system calculates the count after removing duplicate records and records assigned to control groups.

List Detail - Costs Page

Usage	Use the List Detail - Costs page
Object Name	RA_LIST_COST
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, List Detail, Costs**
Prerequisites	Create a list.
Access Requirements	Enter a setID.



List Detail - Costs page

Cost Metrics Header Region

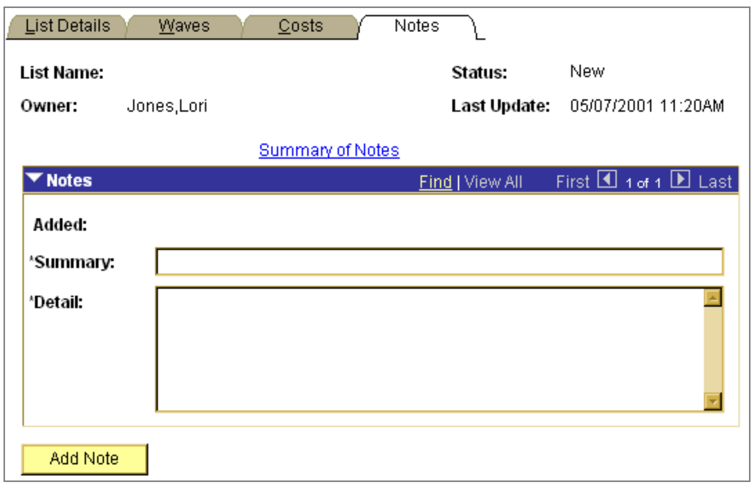
List Name	The descriptive name of the list.
Owner	The person who is responsible for the list.
Status	The position of the list in its life cycle.
Last Update	Most recent date when any source of data used to generate the list—including the query that populates the list—was modified.

Cost Metrics Grid

Cost ID	Select the cost to be recorded.
Description	A brief description of the cost.
Variable	Determines whether the list's cost is variable or fixed. This is determined by your choice of cost type.
Unit Cost	The cost of one unit of the item to be purchased.
Forecast Value	Enter the expected cost of all units of the item to be purchased.
Actual Value	Enter the actual cost of all units of the item to be purchased.

List Detail - Notes Page

Usage	Use the List Detail - Notes page to view brief descriptions of your list notes and to access those notes.
Object Name	RA_LIST_NOTES
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, List Detail, Notes**
Prerequisites	Create a list.
Access Requirements	Enter a set ID.



List Detail - Notes page

Notes Header Region

List Name Descriptive name of the list.

Status Position of the list in its life cycle.

Owner The person who is responsible for a list.

Last Update Most recent date when any source of data used to generate the list—including the query that populates the list—was modified.

Summary of Notes Click **Summary of Notes** to access the List Detail - Notes Summary page.

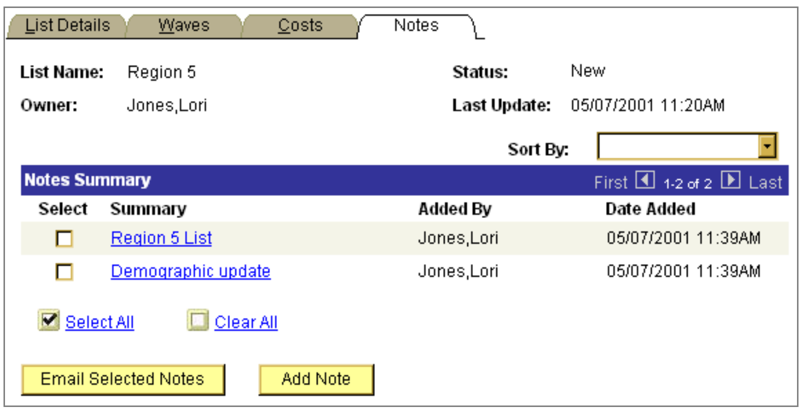
Notes Region

Added Date and time when the note was added, and the user who wrote it.

Summary	Enter a brief summary of the note.
Detail	Enter the main text of the note.

List Detail - Notes Summary Page

Usage	Use the List Detail - Notes Summary page to attach informational notes to your lists.
Object Name	RA_LST_NOTE_SUMRY
Navigation	Click Summary of Notes on the List Detail - Notes page.
Prerequisites	Create list notes.



List Detail - Notes Summary page

Notes Summary Header Region

List Name	The descriptive name of the list.
Status	Position of the list in its life cycle.
Owner	The person who is responsible for a list.
Last Update	Most recent date when any source of data used to generate the list—including the query that populates the list—was modified.
Sort By	Select the attribute by which to sort the notes. You have three choices: ***Summary, Added By,*** and ***Date Added.***

Notes Summary Grid

Summary	Click the summary of a note to access the List Detail - Notes page, with the selected note displayed.
Added By	The user who created the note.
Date Added	Date and time when the note was created.

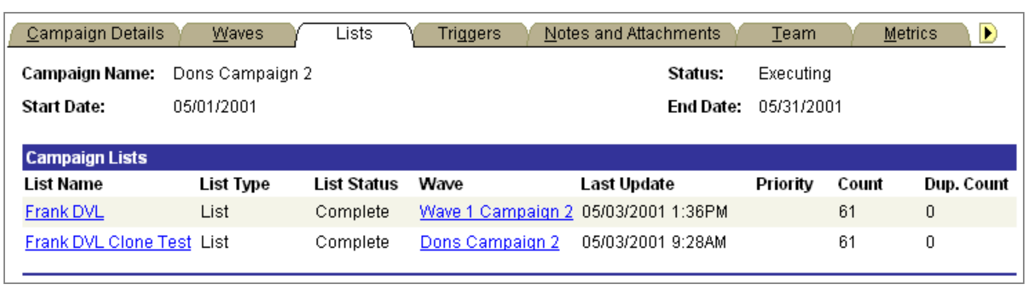
You can send notes to interested parties by email or worklist. To send notes, select the **Select** check boxes of those notes, and click the **Email Selected Notes** button. (Click **Select All** to select all of the notes, or **Clear All** to select none of the notes.) You will be taken to the Send Notification page to set up the email message or worklist note.

Managing Lists

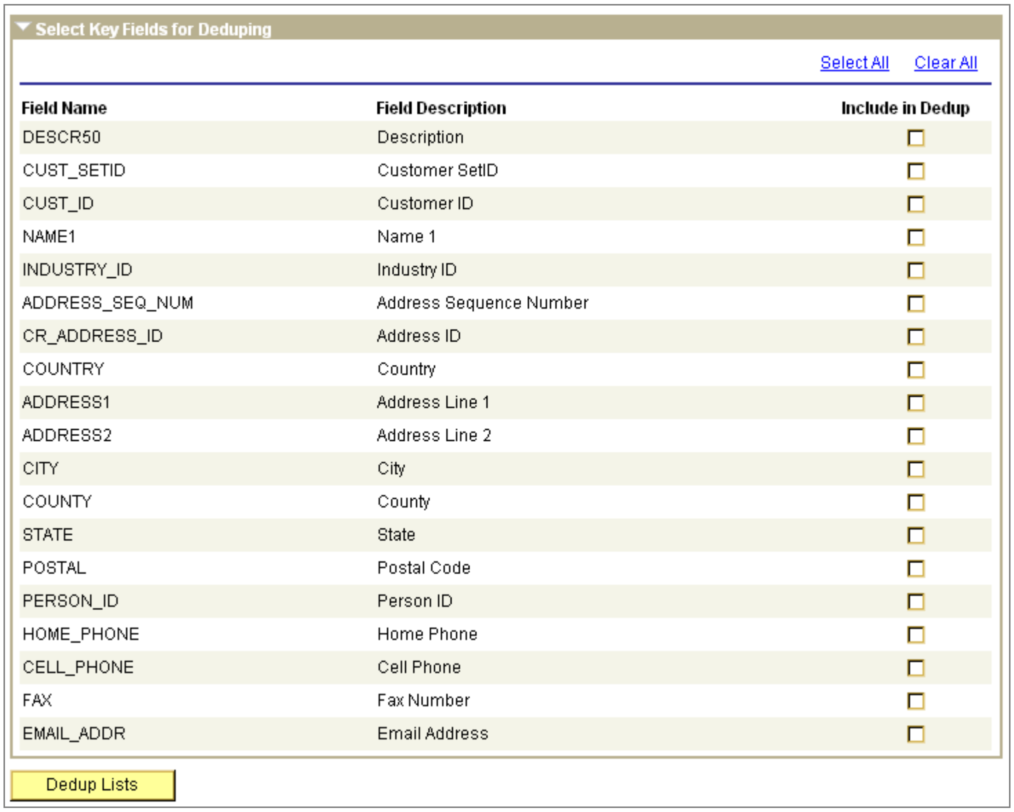
You manage lists using the Campaign Detail - Lists page.

Campaign Detail - Lists Page

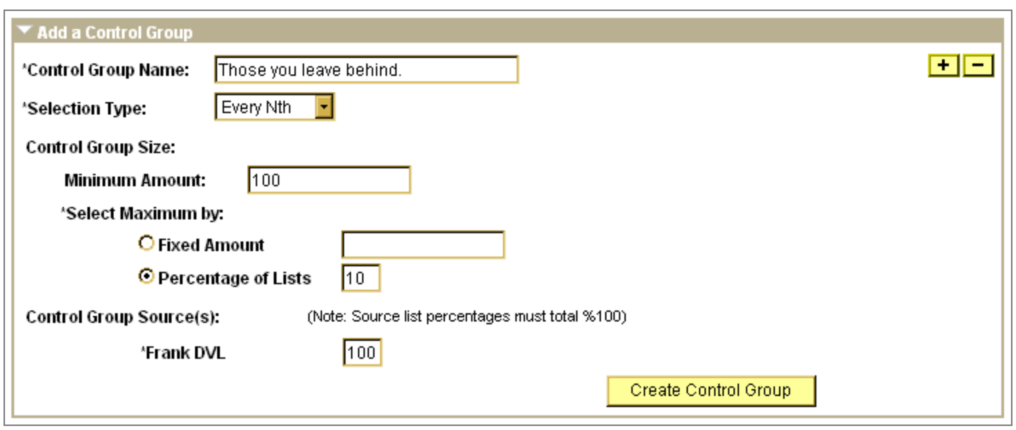
Usage	Use the Campaign Detail - Lists page to attach target audience lists to campaigns.
Object Name	RA_CM_LIST_SUMRY
Navigation	**Home, Campaign Management, Campaign Management, Use, Campaign Detail, Lists**
Access Requirements	Enter a campaign name.



Campaign Detail - Lists page (1 of 3)



Campaign Detail - Lists pcage (2 of 3)



Campaign Detail - Lists page (page 3 of 3)

Campaign Lists Header Region

Campaign Name	Descriptive code that identifies the campaign.
Status	Position of the campaign in its life cycle.
Start Date	Date when the campaign begins.
End Date	Date when the campaign ends.

Campaign Lists Region

List Name — Click the list name to access the List Details page, where you can establish and edit list parameters. The system opens an additional browser window with the List Details page displayed, leaving the original window unchanged.

List Type — The list type: ***List*** or ***Segment.***

List Status — Position of the list in its life cycle.

Wave Name — Click the wave name to access the Wave Detail page with the wave displayed.

Last Update — Most recent date when any source of data used to generate the list—including the query that populates the list—was modified.

Priority — Enter the position of the list in the order of precedence for deduplication. To exclude the list from deduplication, leave the field blank or enter ***0.***

Note. This field is editable only when the list has a status of ***Active, Committed,*** or ***Archived.***

Count — Number of records/people in the list.

The system updates the count after you deduplicate a list, possibly reducing the count. The system also updates the count when you create control groups using members of a list, thereby reducing the count.

Dup. Count (duplication count) — Number of records/people in the list that also exist in other lists associated with the campaign.

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

Select Key Fields for Deduping Region

Use the elements in the Select Key Fields for Deduping region to deduplicate lists associated with the campaign.

For more information about deduplication, see Deduplicating Lists in this chapter.

Field Name — The code that uniquely identifies a field.

Field Description — A brief description of a field.

Include in Dedup — To remove duplicate records from your lists, select **Include in Dedup** for each field that you want to designate as a deduplication key field.

Select All	Select all fields as deduplication key fields.
Clear All	Clear all fields as deduplication key fields.

Add a Control Group Region

Control Group Name	Enter a descriptive name for the control group.
Selection Type	Select the manner in which the system selects specific records/people to place in control groups.
Minimum Amount	Enter the smallest control group size that you consider acceptable.
Select Maximum by	Select the manner in which to define the size of a control group. Enter a maximum value.
Control Group Source(s)	Enter the percentage of the total number of control group members to draw from each of your lists. The total percentage must equal 100. **Note.** You can draw control group members only from lists that have the status ***Active, Committed,*** or ***Archived.***
Create Control Group	Click the **Create Control Group** button to generate a control group.

Deduplicating Lists

The lists that you associate with your marketing campaigns will sometimes overlap, containing duplicate versions of the same customer records. You can clean out duplicate customer records using a process called *deduplication.* This process does not effect the original lists.

Selecting Deduplication Keys

When you deduplicate the lists associated with a campaign, the system removes records whose deduplication keys match those of other records. (You select deduplication keys in the Select Key Fields for Deduping region of the Campaign Detail - Lists page.) For example, you might establish CUST_ID and PERSON_ID as deduplication keys for a particular campaign. The system would then compare the records in all of the lists associated with the campaign that you select for deduplication and delete those records that had both the same CUST_ID and the same PERSON_ID.

Prioritizing Lists for Deduplication

You prioritize lists to determine which records the system removes first. The system removes lower-priority duplicates before higher-priority duplicates. You indicate the relative priority of your lists by giving higher priority numbers to lower-priority lists. The higher the priority number, the lower the list's priority.

To deduplicate only some of the lists associated with a campaign, leaving the other lists as they are, assign the priority number zero to the lists that you want to preserve intact. A list with priority number zero is not compared with other lists during deduplication, so the system does not remove record that appear in both those lists and other lists (even if those other lists have priority numbers other than zero). Nor does the system include such duplicate records in the Dup. Count (duplicate count) field on the Campaign Detail - Lists page.

Note. You can only deduplicate (or compare with other lists to be deduplicated) those lists whose status is *Active, Committed,* or *Archived.*

Example: List Priorities

Suppose that you create the following lists: Northern Region, Southern Region, Eastern Region, and Western Region. You assign the priority numbers 2, 3, 0, and 1, respectively. Deduplication reveals duplicate records (records with identical deduplication keys) in all regions. The system removes those 12 records from the Southwestern Region list because that list has a higher priority number than the Northwestern Region.

List Name	***Priority Number***	***Deletion Order***
Southern Region	3	First records deleted.
Northern Region	2	Second records deleted.
Western Region	1	Third records deleted.
Eastern Region	0	No records deleted.

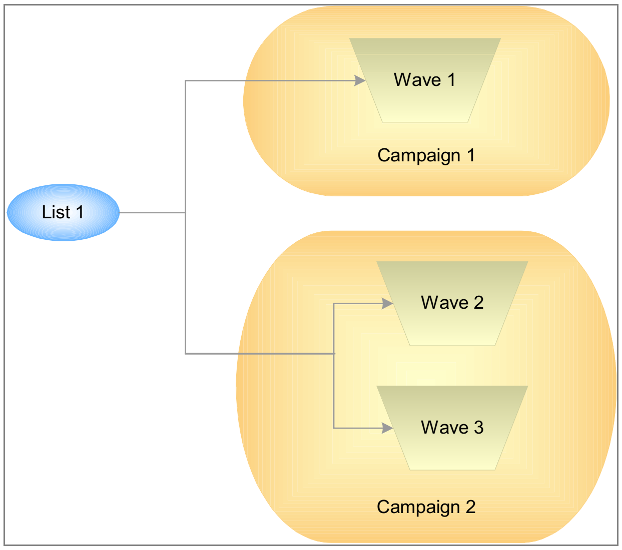
Running Deduplication

You deduplicate lists by clicking the Dedup Lists button on the Campaign Detail - Lists page.

Note. You can only deduplicate (or compare with other lists to be deduplicated) those lists whose status is *Active, Committed,* or *Archived.*

Attaching Lists to Campaign Waves

The relationship between lists and waves is one-to-many; you can associate one list with many waves. This relationship is illustrated in the following diagram:



Relationship between lists and campaign waves

You associate lists with waves using either the List Detail - Waves page or the Campaign Detail - Waves page.

Exporting Lists

You may find it useful to save copies of your lists in files that can be opened in third-party applications. For example, you might open a list in a spreadsheet program, or in a text document. You can export lists to .csv (comma-delimited) files for that purpose.

Important! The system exports only those lists that have the status *Committed.*

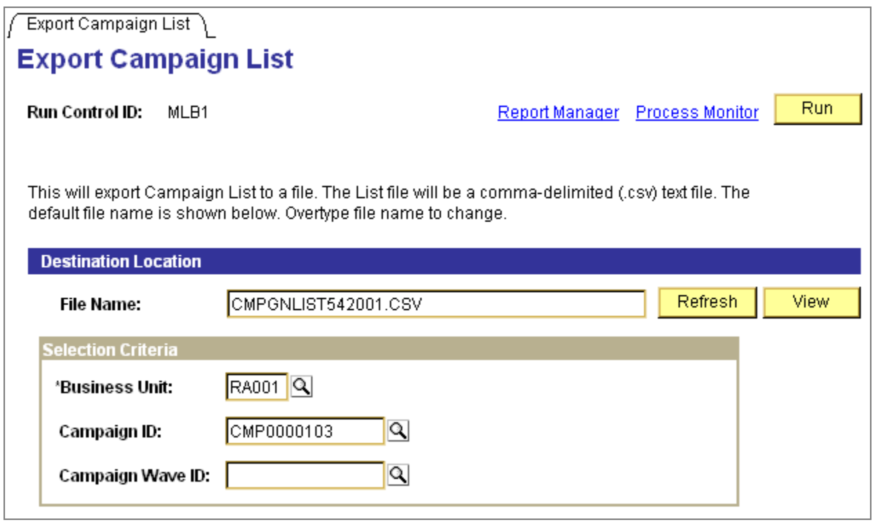
You select lists to export by wave, campaign, or business unit. The system combines all records in all lists associated with the object that you specify (wave, campaign, or business unit), and creates one .csv file. For example, if you specify a campaign ID, the system exports all lists in all waves associated with that campaign. Alternately, if you specify a business unit, the system exports all lists in all waves associated with all campaigns that reside in the business unit.

Note. If you remove records/people from a list as part of deduplication, or move list members into a control group, the system will not export those members.

Note. Exported lists may contain duplicate records. To prevent repetition of list members, you may need to deduplicate exported lists in third-party applications.

Export Campaign List Page

Usage	Use the Export Campaign List page to export lists into .csv, comma-delimited text files. You can open .csv files in third-party applications.
Object Name	RA_LIST_EXPORT_AE
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Process, Export Campaign List**
Prerequisites	Create lists.
Access Requirements	Enter a run control ID.



Export Campaign List page

Export Campaign List Header Region

Run Control ID	The code that uniquely identifies the instance of exporting a campaign list.

Destination Location Region

File Name	Enter a name for the .csv file to be generated from the list or accept the autogenerated file name when you access this page.
Refresh	Click the **Refresh** button to populate the page with the most recent data available.

View	Click the **View** button to view the campaign list that you have exported. You are offered the choice to either open the file in a new web browser window or save the file to disk.

Selection Criteria Region

Business Unit	If you want to export all lists associated with all waves in all campaigns that reside in a business unit, select the business unit here.
Campaign ID	If you want to export all lists associated with all waves in a campaign, select the campaign here.
Campaign Wave ID	If you want to export the list associated with a wave, select the wave here.

Note. The system exports only those lists that have the status *Committed.*

CHAPTER 9

Using PeopleSoft CRM Marketing Workflow

As your marketing campaigns progress, you can use PeopleSoft CRM Marketing workflow to notify team members of campaign milestones, such as list approvals, wave executions, and campaign completions.

For more information about PeopleSoft CRM workflow, see Defining Workflow in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Understanding PeopleSoft CRM Marketing Workflow

You can use PeopleSoft CRM Marketing workflow to notify specified team members whenever the status of a campaign object changes, in a predefined sequence.

Understanding Campaign Workflow Events

We refer to the delivery of information through PeopleSoft CRM Marketing workflow as a *campaign workflow event.* PeopleSoft CRM Marketing is delivered with two campaign workflow events:

- Email messages
- Worklist notes

Every campaign workflow event message includes a link to the relevant application page.

Note. You can define additional campaign workflow events using PeopleSoft Application Designer.

For more information about using PeopleSoft Application Designer, see Application Designer in the *PeopleTools Application Designer PeopleBook.*

Using Workflow to Notify Users When the Status of a Single Campaign Object Changes

You can use PeopleSoft CRM Marketing workflow to notify specified team members each time that the status of a campaign changes. You use the Campaign Workflow page to set up such campaign workflow events. We refer to the text included in campaign workflow events as *message text.* Message text appears in the body of an email message, or in the Reason to Receive field of a worklist note (depending on the campaign workflow event you select—email messages or worklist notes). You use the Workflow Messages page to define message text. The subject field of a workflow-generated email message includes the name of the sender and a description of the campaign object referenced in the message text.

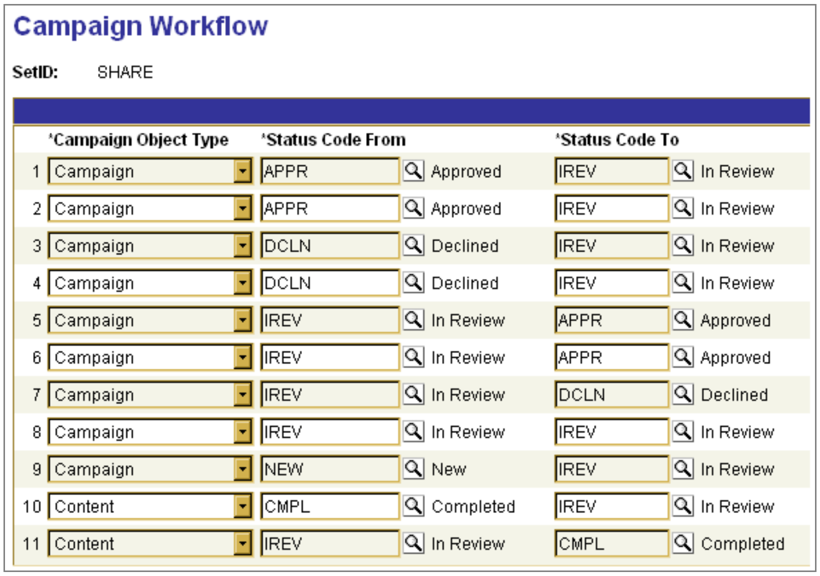
Example: Status of a Single Campaign Object Changes

You are the marketing manager of your company. You need to be informed whenever a campaign manager approves a new marketing campaign. So you use PeopleSoft CRM Marketing workflow to receive an email message each time the status of a campaign changes from In Review to Approved. Those email messages read, “The status of a campaign has changed from In Review to Approved.” Each campaign workflow event message includes a link to the Campaign Detail - Campaign Detail page, where the referenced campaign is displayed.

For more information about the Campaign Workflow page, see Campaign Workflow Page.

Campaign Workflow Page

Usage	Use the Campaign Workflow page to set up campaign workflow events to be triggered when campaign statuses change.
Object Name	RA_UD_WL_TRIGGER
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Campaign Workflow**
Access Requirements	Enter a setID.

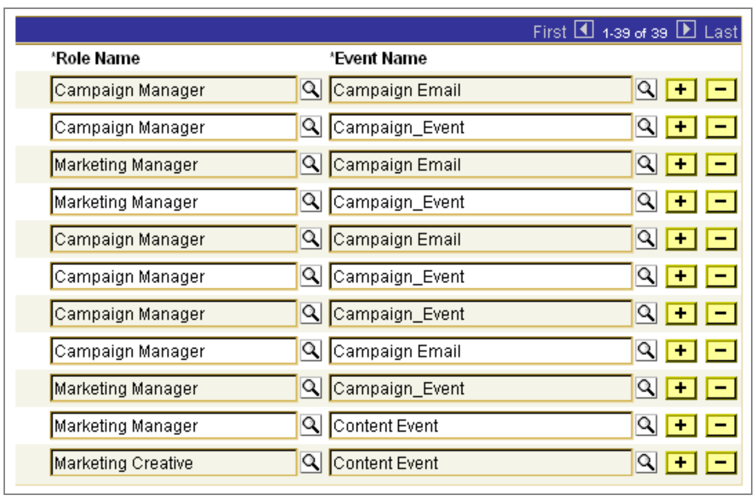


Campaign Workflow

SetID: SHARE

	*Campaign Object Type	*Status Code From		*Status Code To	
1	Campaign	APPR	Approved	IREV	In Review
2	Campaign	APPR	Approved	IREV	In Review
3	Campaign	DCLN	Declined	IREV	In Review
4	Campaign	DCLN	Declined	IREV	In Review
5	Campaign	IREV	In Review	APPR	Approved
6	Campaign	IREV	In Review	APPR	Approved
7	Campaign	IREV	In Review	DCLN	Declined
8	Campaign	IREV	In Review	IREV	In Review
9	Campaign	NEW	New	IREV	In Review
10	Content	CMPL	Completed	IREV	In Review
11	Content	IREV	In Review	CMPL	Completed

Campaign Workflow page (1 of 2)



First 1-39 of 39 Last

*Role Name	*Event Name
Campaign Manager	Campaign Email
Campaign Manager	Campaign_Event
Marketing Manager	Campaign Email
Marketing Manager	Campaign_Event
Campaign Manager	Campaign Email
Campaign Manager	Campaign_Event
Campaign Manager	Campaign_Event
Campaign Manager	Campaign Email
Marketing Manager	Campaign_Event
Marketing Manager	Content Event
Marketing Creative	Content Event

Campaign Workflow page (1 of 2)

Campaign Workflow Header Region

SetID SetID within which the PeopleSoft CRM Marketing workflow events take place.

Campaign Workflow Triggers Grid

Campaign Object Type

- Select one of the following campaign object types:

- ***Campaign***
- ***Campaign Task***

- ***Campaign Wave***
- ***Content***
- ***Content Task***
- ***Offer***

Status Code From

Select the initial status of the campaign object that you selected in the previous field. This is the status of the campaign object *before* the workflow event is triggered.

For more information about statuses, see Understanding Statuses.

Status From (unlabeled field)

Descriptive name of the status that you selected in the previous field.

Status Code To

Select the new status of the campaign object that you selected in the previous field. This is the status of the campaign object when the workflow event is triggered; the change to this status triggers the workflow event.

Status To (unlabeled field)

Descriptive name of the status that you selected in the previous field.

Role Name

Select the campaign team role of the person to be notified.

For more information about campaign team roles, see Defining Campaign Team Roles.

Event Name

Select the workflow event to take place when the status conditions that you defined in the preceding fields are met.

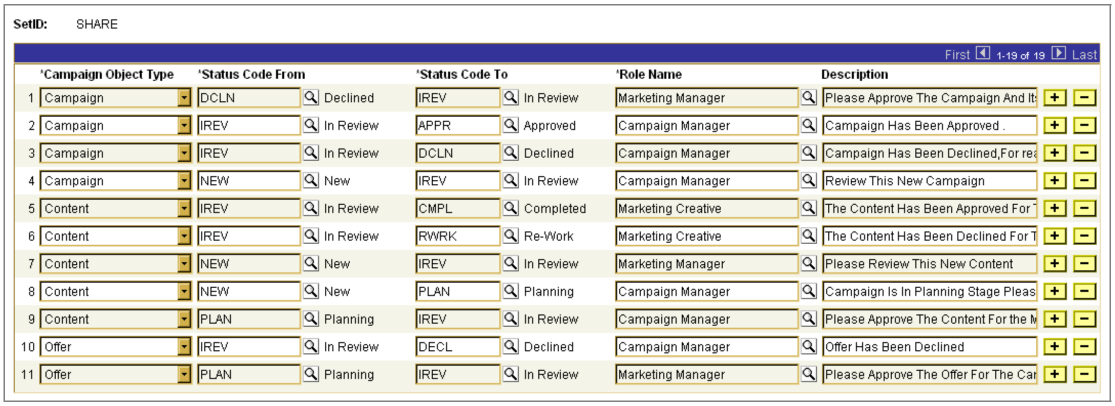
Workflow events are specific to campaign objects. For example, a change in the status of content (a campaign object) can trigger either Content_Email or Content Event (workflow events).
All workflow events take one of two basic forms:

<Campaign Object> Email: Send an email message.

<Campaign Object> Event: Send a worklist note.

Workflow Messages Page

Usage	Use the Workflow Messages page to define campaign workflow event messages.
Object Name	RA_UD_WL_MSGES
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Setup, Workflow Messages**
Access Requirements	Enter a setID.



SetID: SHARE

First 1-19 of 19 Last

	*Campaign Object Type	*Status Code From		*Status Code To		*Role Name	Description
1	Campaign	DCLN	Declined	IREV	In Review	Marketing Manager	Please Approve The Campaign And It
2	Campaign	IREV	In Review	APPR	Approved	Campaign Manager	Campaign Has Been Approved .
3	Campaign	IREV	In Review	DCLN	Declined	Campaign Manager	Campaign Has Been Declined,For rea
4	Campaign	NEW	New	IREV	In Review	Campaign Manager	Review This New Campaign
5	Content	IREV	In Review	CMPL	Completed	Marketing Creative	The Content Has Been Approved For T
6	Content	IREV	In Review	RWRK	Re-Work	Marketing Creative	The Content Has Been Declined For T
7	Content	NEW	New	IREV	In Review	Marketing Manager	Please Review This New Content
8	Content	NEW	New	PLAN	Planning	Campaign Manager	Campaign Is In Planning Stage Pleas
9	Content	PLAN	Planning	IREV	In Review	Campaign Manager	Please Approve The Content For the M
10	Offer	IREV	In Review	DECL	Declined	Campaign Manager	Offer Has Been Declined
11	Offer	PLAN	Planning	IREV	In Review	Marketing Manager	Please Approve The Offer For The Car

Workflow Messages page

Campaign Workflow Messages Header Region

SetID SetID within which the PeopleSoft CRM Marketing workflow messages reside.

Campaign Workflow Messages Grid

Campaign Object Type

- Select one of the following campaign object types:
- ***Campaign***
- ***Campaign Task***
- ***Campaign Wave***
- ***Content***
- ***Content Task***
- ***Offer***

Status Code From Select the initial status of the campaign object that you selected in the previous field. This is the status of the campaign object *before* the workflow event is triggered.

For more information about statuses, see Understanding Statuses.

Status From (unlabeled field) Descriptive name of the status that you selected in the previous field.

Status Code To Select the new status of the campaign object that you selected in the previous field. This is the status of the campaign object when the workflow event is triggered; the change of status triggers the workflow event.

Status To (unlabeled field)	Descriptive name of the status that you selected in the previous field.
Role Name	Select the campaign team role of the person to be notified. **For more information** about campaign team roles, see Defining Campaign Team Roles.
Description	The message text that appears in the body of an email message or in the Reason to Receive field of a worklist note

CHAPTER 10

Using Metrics

Metrics help you assess the effectiveness of campaigns and campaign waves. That analysis guides you in fine-tuning campaigns in progress and in maximizing the performance of future campaigns.

Understanding Metrics

Metrics are mechanisms for measuring campaign performance. You associate metrics with your campaigns and waves. The system then draws data from campaign and wave tables and displays the results on campaign and wave detail pages.

Example: Using a Metric

Suppose that you want to know how effectively your last campaign generated high-quality sales leads. You consider several factors in your analysis:

- Number of leads generated during the campaign.
- Number of quotes produced by campaign-generated leads.
- Revenue earned from campaign-generated leads.
- Average campaign cost per lead.

You use PeopleSoft CRM Marketing metrics to calculate all of that data. You attach the following four, predefined metrics to the campaign:

- No. of Leads
- Lead to Quote ratio
- Revenue per Lead
- Cost per Lead

The metrics show that your campaign generates a high number of leads, resulting in a low cost per lead; this surprises you, because you initially considered this an expensive campaign. The leads generated by the campaign produce few quotes, but much revenue.

Pleased with the results, you decide to use the same campaign team to create a follow-up campaign. You instruct the team to promote the use of quotes more energetically next time.

Metric Details

In addition to the standard PeopleSoft object attributes (name, description, business unit, and so on), a metric comprises the following elements and characteristics:

Unit Of Measure

You measure the effectiveness of a campaign or wave based on a particular unit of measure. For example, you might assess return on investment (ROI) using U.S. dollars, or you might measure campaign effectiveness in units of product sold. You have the following options:

%: Percentage of total.

Count: Number of customers.

Amount:: Currency amount.

Units: Number of units.

Metric Type

The metric type identifies the type of object that a metric helps you analyze. There are two metric types: *campaign* and *wave.* Campaign metrics measure campaign performance; wave metrics measure wave performance.

Metric Sub Type

The subtype identifies the main focus of a metric's analysis. There are two metric subtypes: *performance* and *financial.* Knowing the subtype of a metric helps you determine whether it is appropriate for a particular analysis.

SQL Object

A SQL object contains the SQL statement that governs a metric's calculations. SQL objects (and statements) are predefined for the metrics that are delivered with your system. You can design SQL objects in PeopleSoft Application Designer.

If you create custom metrics, you must define accompanying SQL objects and statements. SQL objects designed to govern PeopleSoft CRM Marketing metrics must have names that begin with the prefix RA_. Save such SQL objects in the PeopleTools dictionary of your CRM database.

For more information about designing SQL objects in PeopleSoft Application Designer, see Application Designer in the *PeopleTools Application Designer PeopleBook.*

SQL Statement

Every metric has an associated SQL object that contains a SQL statement. That SQL statement governs the metric's calculations.

Note. SQL statements for campaign metrics should prompt users for at least two search parameters: business unit and campaign ID. SQL statements for wave metrics should prompt users for at least three search parameters: business unit, campaign ID, and wave ID.

Active Status

A metric's active status determines whether a metric is available for standard use. You can remove a metric from standard use by setting its status to Inactive. 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.

Understanding Metric Types and Subtypes

Types and subtypes help you categorize your metrics. Metric types also help determine how metrics function.

Understanding Metric Types

Metric types identify the types of object that metrics help you analyze, helping you categorize those metrics.

There are two metric types:

Metric Type	***Metric Description***
Campaign	Helps you analyze the performance of campaigns.
Wave	Helps you analyze the performance of waves.

Metric types also affect the way that metrics function. The system calculates results for campaign metrics differently than for wave metrics.

Important! Because the system calculates results for campaign metrics differently than for wave metrics, it is essential that you assign the right types to your metrics.

Understanding Metric Subtypes

Metric subtypes are variants of metric types. Subtypes identify the main focus of metrics' analysis, helping you categorize those metrics.

There are two metric subtypes:

Metric Subtype	**Metric Description**
Performance	Helps you analyze the effectiveness of marketing activities, without regard for cost. Question addressed: “Does the campaign or wave produce desired results?”
Financial	Helps you analyze the value of marketing activities, correlating expenses with results. Question addressed: “Does the campaign or wave perform well enough to justify its cost?”

Understanding Metric Data Collection

The system collects data about different costs in different ways:

Cost	**Data Source**	**Notes**
Content	Manage Content - Costs page	You enter the cost of content when you define that content. The system adds the cost of the content associated with a wave to the total cost of the wave. Therefore, when you run a metric that includes wave cost, the cost of associated content is included.
Lists	Campaign Detail - Waves page	You enter the cost of lists when you define those lists. The system adds the cost of lists associated with campaigns and waves to the total cost of those campaigns and waves. Therefore, when you run a metric that includes the cost of a campaign or wave, the cost of associated lists is included.
Other	Campaign Detail - Metrics page, Cost grid Campaign Detail - Waves page, Cost grid	You enter this information when you set up metrics.

The Other cost category typically includes expenses associated with entire campaigns, as opposed to costs associated with individual campaign waves. Campaign wave costs are generally maintained at the wave level, so that users can more closely monitor wave costs. Administrative costs (consulting, market research, and so on) are often maintained at the whole-campaign level and entered as “other” costs.

Predefined Metrics

The most commonly used metrics are delivered with your system. You can define additional metrics on the Maintain Metrics - Performance Metric Details page.

PeopleSoft CRM Marketing is delivered with the following predefined metrics:

Metric Name	***Description***	***Unit of Measure***
Cost	Campaign wave level	Currency amount
Cost	Campaign level	Currency amount
Cost per Lead	Campaign wave level	Currency amount
Cost per Lead	Campaign level	Currency amount
Cost per Quote	Campaign wave level	Currency amount
Cost per Quote	Campaign level	Currency amount
Lead to Quote ratio	Campaign wave level	Percentage
Lead to Quote ratio	Campaign level	Percentage
No. of Leads (number of leads)	Campaign wave level	Count
No. of Leads (number of leads)	Campaign level	Count
No. of Opportunities (number of opportunities)	Campaign wave level	Count
No. of Opportunities (number of opportunities)	Campaign level	Count
No. of Quotes (number of quotes)	Campaign wave level	Count
No. of Quotes (number of quotes)	Campaign level	Count
No. of Responses (number of responses)	Campaign wave level	Count
No. of Responses (number of responses)	Campaign level	Count
No. Targeted (number targeted)	Campaign wave level	Count
No. Targeted (number targeted)	Campaign level	Count
Opportunity to Quote ratio	Campaign wave level	Percentage
Opportunity to Quote ratio	Campaign level	Percentage
Response Rate	Campaign wave level	Percentage
Response Rate	Campaign level	Percentage
Responses "Do Not Contact"	Campaign wave level	Count
Responses "Do Not Contact"	Campaign level	Count
Revenue	Campaign wave level	Currency amount

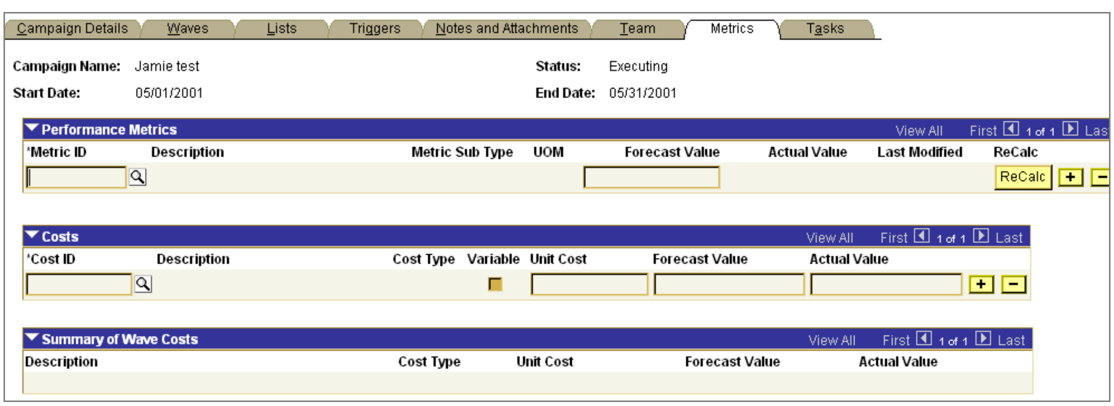
Revenue	Campaign level	Currency amount
Revenue per Lead	Campaign wave level	Currency amount
Revenue Per Lead	Campaign level	Currency amount
Revenue per Quote	Campaign wave level	Currency amount
Revenue per Quote	Campaign level	Currency amount
ROI	Campaign wave level	Currency amount
ROI	Campaign level	Currency amount

Running Metrics

You run metrics on the detail pages of the objects to be analyzed. You run metrics about campaigns on the Campaign Detail - Metrics page. You run metrics about waves on the Performance Metrics grid of the Campaign Detail - Waves page.

Campaign Detail - Metrics Page

Usage	Use the Campaign Detail - Metrics page to document the effectiveness of your marketing campaigns.
Object Name	RA_CMPGN_METRICS
Navigation	**Campaign Management, Campaign Management, Use, Campaign Detail, Campaign Metrics**
Prerequisites	Define a campaign.
Access Requirements	Enter a campaign name.



Campaign Detail - Metrics page

Metrics Header Region

Campaign Name	Descriptive code that identifies the campaign.
Status	Position of the campaign in its life cycle.
Start Date	Date when the campaign begins.
End Date	Date when the campaign ends.

Performance Metrics Grid

In the **Performance Metrics** grid, you select the terms by which to measure campaign performance.

Metric ID	Select the metric by which to measure campaign performance.
Description	Brief description of the metric.
Metric Sub Type	Qualifies the metric as measuring one of two aspects of the campaign: ***performance*** or ***financial.***
UOM	Unit of measure in which the metric is calculated.
Forecast Value	Enter the result that you expect.
Actual Value	The actual result. The system populates this field with data from various tables, and sometimes from multiple applications (such as PeopleSoft CRM Sales and PeopleSoft CRM Call Center).
Last Modified	Date and time when the metric was last updated.
ReCalc (recalculate)	Recalculate the metric.

Note. For the sake of performance, the system recalculates metrics *only* when you click the **ReCalc** button.

Costs Grid

In the Cost grid, you enter campaign costs that you have not entered elsewhere.

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

Cost ID	Enter the code that uniquely identifies the category of expenses.
Description	Brief description of the cost.

Cost Type The code that uniquely identifies the campaign element for which you incurred the expense. You define cost types on the Costs Setup page.

Variable Defines the cost as either variable (if the read-only check box is selected) or fixed.

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

Forecast Value Enter the amount that you expect to pay for all units of the product or service measured in this cost metric.

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

Summary of Wave Costs Grid

Description Brief description of the cost.

Cost Type The code that uniquely identifies the campaign element for which you incurred the expense.

Unit Cost The cost of one unit of the product or service measured in this cost metric.

Forecast Value The amount that you expected to pay for all units of the product or service measured in this cost metric.

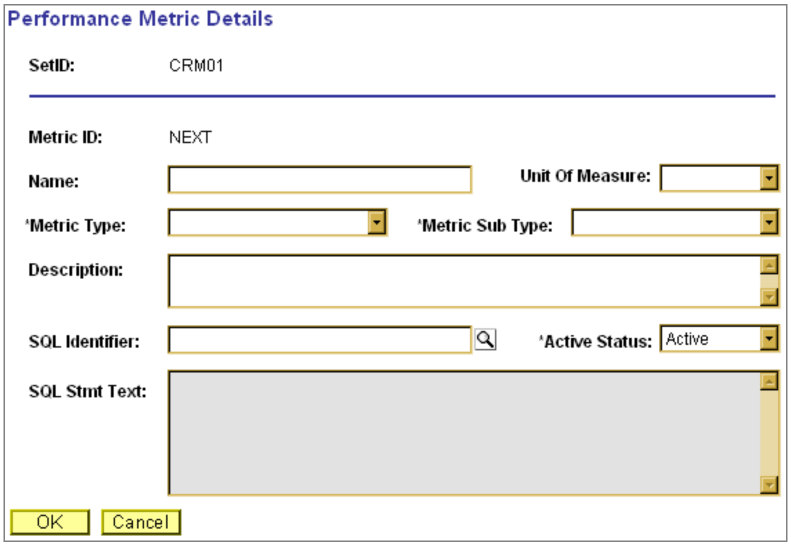
Actual Value The amount that you actually paid for all units of the product or service measured in this cost metric.

Defining Metrics

Most of the metrics that you use are delivered with your system. However, you can create additional metrics as needed.

Maintain Metrics - Performance Metric Details Page

Usage	Use the Maintain Metrics - Performance Metric Details page to define metrics.
Object Name	RA_METRICS
Navigation	**Campaign Management, Campaign Management, Setup, Maintain Metrics**
Prerequisites	Define the SQL object that contains the SQL statement that defines how the metric functions. Define a metric type and a metric subtype.
Access Requirements	Enter a setID.



Maintain Metrics - Performance Metric Details page

SetID The setID within which the metric resides.

Metric ID The code that uniquely identifies the metric.

Name Enter a descriptive name for the metric.

Unit Of Measure Select the unit in which to measure the campaign's effectiveness.

Metric Type Select the type of object to be analyzed: ***campaign*** or ***wave.***

Metric Sub Type Define the nature of the analysis: ***performance*** or ***financial.***

Description Enter a description of the metric.

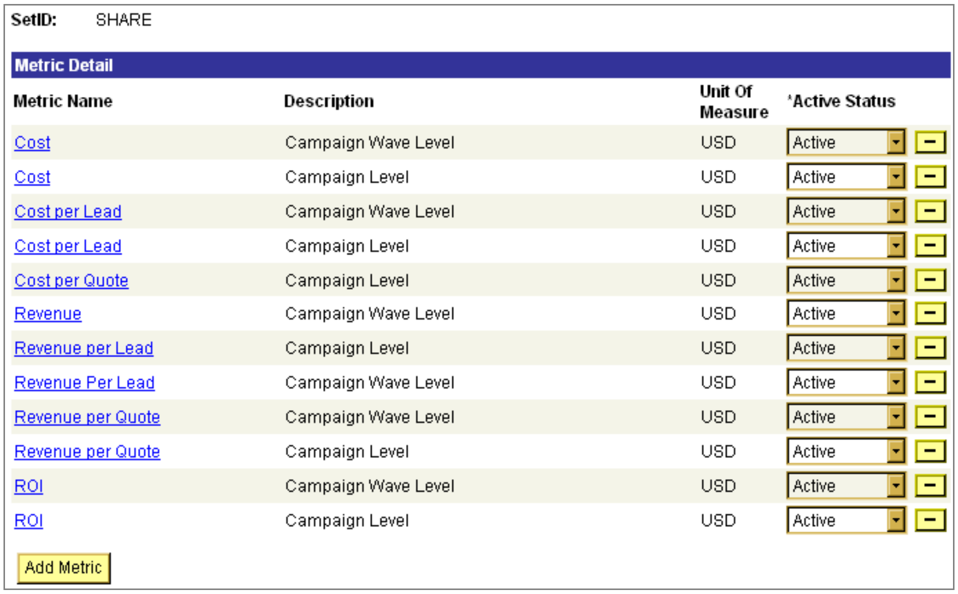
SQL Identifier Unique identifier of the SQL object that contains the SQL statement that governs the metric's calculations.

Active Status The metric's status: ***Active*** or ***Inactive.***

SQL Stmt Text That SQL statement that governs the metric's calculations.

Maintain Metrics Page

Usage	Use the Maintain Metrics page to access existing metrics and to initiate new metrics.
Object Name	RA_METRICS_SUMM
Navigation	**Campaign Management, Campaign Management, Setup, Maintain Metrics**
Access Requirements	Enter a setID.


SetID: SHARE

Metric Detail

Metric Name	Description	Unit Of Measure	*Active Status
Cost	Campaign Wave Level	USD	Active
Cost	Campaign Level	USD	Active
Cost per Lead	Campaign Wave Level	USD	Active
Cost per Lead	Campaign Level	USD	Active
Cost per Quote	Campaign Level	USD	Active
Revenue	Campaign Wave Level	USD	Active
Revenue per Lead	Campaign Level	USD	Active
Revenue Per Lead	Campaign Wave Level	USD	Active
Revenue per Quote	Campaign Wave Level	USD	Active
Revenue per Quote	Campaign Level	USD	Active
ROI	Campaign Wave Level	USD	Active
ROI	Campaign Level	USD	Active

Add Metric

Maintain Metrics Page

Metric Detail Grid

Metric Name Descriptive name of the metric.

Description Description of the metric.

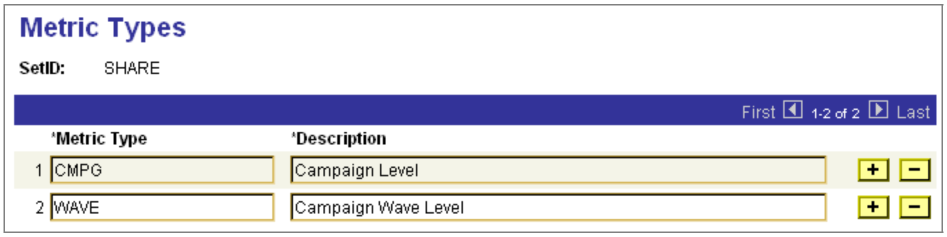
Unit of Measure Unit in which you measure the campaign's effectiveness.

Active Status The metric's status: ***Active*** or ***Inactive.***

Add Metric Click the **Add Metric** button to access the Maintain Metrics - Performance Metric Details page, where you can add a new metric.

Metric Types Page

Usage	Use the Metric Types page to define metric types.
Object Name	RA_UD_MET_TYPE
Navigation	**Define Business Rules, Structure Campaign Management, Use, Metric Types**
Access Requirements	Enter a setID.



Metric Types page

SetID	The setID within which the metric types reside.
Metric Type	Enter a code that uniquely identifies the metric type.
Description	Enter a brief description of the metric.

CHAPTER 11

Running PeopleSoft CRM Marketing Reports

PeopleSoft CRM Marketing provides you with multiple predefined reports. You can use these reports to assess the performance of your marketing campaigns.

List of PeopleSoft CRM Marketing Reports

The following PeopleSoft CRM Marketing reports are delivered predefined with your system:

Report Name	***Report ID***	***Location***
Campaign Effectiveness	RAC1000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign Effectiveness**
Wave Effectiveness	RAC1001	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Wave Effectiveness**
Campaign and Wave Effectiveness	RAC1002	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign and Wave Effectiveness**
Campaign Management	RAC10000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign Management Report**
Task Management	RAC2000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Task Management Report**

Content Management	RAC9000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Content Management Report**
Campaign-Content Management	RAC9001	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign-Content Management Report**
Channel Performance	RAC3000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Channel Performance Report**
List Performance	RAC4000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, List Performance Report**
Product Performance	RAC5000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Product Performance Report**
ROI	RAC7000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, ROI Report**
Campaign Expense	RAC8000	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign Expense Report**

Campaign Effectiveness Report

The Campaign Effectiveness report displays information about leads generated, accepted and closed during campaigns.

Report ID	RAC1000
Type of Report	Crystal
Source	RUN_RAC1000

Campaign Effectiveness Report Run Control Page

Usage	Use the Campaign Effectiveness Report Run Control page to run the Campaign Effectiveness report.
Object Name	RUN_RAC1000
Navigation	**Home, Campaign Management, Campaign Management, Reports, Campaign Effectiveness**
Access Requirements	Enter a Run Control ID.

Campaign Effectiveness Report Run Control page

Run Control ID The code that uniquely identifies the specific instance of running the report.

Business Unit Select the business unit within which the activities to be described in the report took place.

From Date Select the first date of the time period to be described in the report.

Thru Date Select the last date of the time period to be described in the report.

Campaign Status Select the position in the life cycle of the campaigns to be described in the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

Wave Effectiveness Report

The Wave Effectiveness report displays information about leads generated during waves.

Report ID	RAC1001
Type of Report	Crystal
Source	RUN_RAC1001

Wave Effectiveness Report Run Control Page

Usage	Use the Wave Effectiveness Report Run Control page to run the Wave Effectiveness report.
Object Name	RUN_RAC1001
Navigation	**Home, Campaign Management, Campaign Management, Reports, Wave Effectiveness**
Access Requirements	Enter a Run Control ID.

Wave Effectiveness Report Run Control page

Run Control ID The code that uniquely identifies the specific instance of running the report.

Business Unit Select the business unit within which the activities to be described in the report took place.

Campaign Status Select the position in the life cycle of the campaigns to be described in the report.

From Date	Select the first date of the time period to be described in the report.
Thru Date	Select the last date of the time period to be described in the report.
Report Manager	Click **Report Manager** 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 **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

Campaign and Wave Effectiveness Report

The Campaign and Wave Effectiveness report displays information about the leads generated during waves and campaigns.

Report ID	RAC1002
Type of Report	Crystal
Source	RUN_RAC1002

Campaign and Wave Effectiveness Report Run Control Page

Usage	Use the Campaign and Wave Effectiveness Report Run Control page to run the Wave Effectiveness report.
Object Name	RUN_RAC1002
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign and Wave Effectiveness**
Access Requirements	Enter a Run Control ID.

Campaign and Wave Effectiveness Report Run Control page

Run Control ID	The code that uniquely identifies the specific instance of running the report.
Business Unit	Select the business unit within which the activities to be described in the report took place.
From Date	Select the first date of the time period to be described in the report.
Thru Date	Select the last date of the time period to be described in the report.
Report Manager	Click **Report Manager** 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 **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

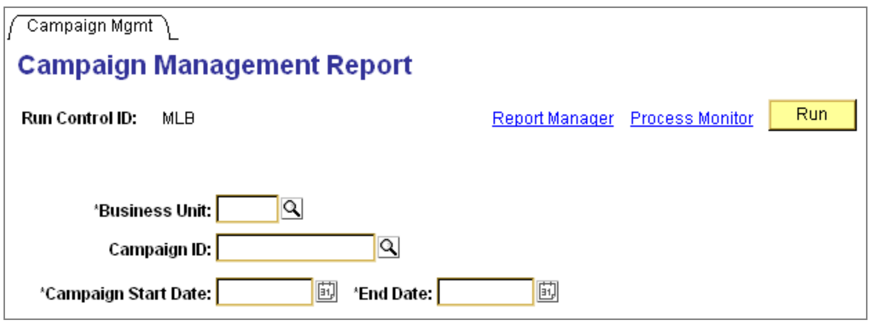
Campaign Management Report

The Campaign Management report displays information about campaigns, waves, and rollup campaigns.

Report ID	RAC10000
Type of Report	Crystal
Source	RUN_RAC10000

Campaign Management Report Run Control Page

Usage	Use the Campaign Management report run control page to run Campaign Management reports.
Object Name	RUN_RAC10000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign Management Report**
Access Requirements	Enter a run control ID.



Campaign Management report run control page

Run Control ID The code that uniquely identifies the specific instance of running the report.

Business Unit Select the business unit within which the activities to be described in the report took place.

Campaign ID Select the campaign to be described in the report.

Campaign Start Date Select the start date of the campaign to be described in the report.

End Date Select the end date of the campaign to be described in the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

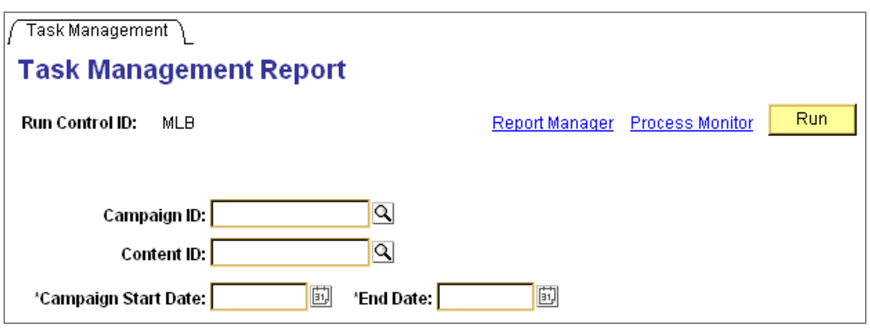
Task Management Report

The Task Management report displays information about tasks.

Report ID	RAC2000
Type of Report	Crystal
Source	RUN_RAC2000

Task Management Report Run Control Page

Usage	Use the Task Management report run control page to run Task Management reports.
Object Name	RUN_RAC2000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Task Management Report**
Access Requirements	Enter a run control ID.



Run Control ID The code that uniquely identifies the specific instance of running the report.

Campaign ID Select the campaign to be described in the report.

Campaign Start Date Select the start date of the campaign to be described in the report.

End Date Select the end date of the campaign to be described in the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

Content Management Report

The Content Management report displays information about content.

Report ID	RAC9000
Type of Report	Crystal
Source	RUN_RAC9000

Content Management Report Run Control Page

Usage	Use the Content Management report run control page to run Campaign Management reports.
Object Name	RUN_RAC9000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Content Management Report**
Access Requirements	Enter a run control ID.

Content Management report run control page

Run Control ID The code that uniquely identifies the specific instance of running the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

Campaign-Content Management Report

The Campaign-Content Management report displays information about the content associated with a single campaign.

Report ID	RAC9001
Type of Report	Crystal
Source	RUN_RAC9001

Campaign-Content Management Report Run Control Page

Usage	Use the Campaign-Content Management report run control page to run Campaign-Content Management reports.
Object Name	RUN_RAC9001
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign-Content Management Report**
Access Requirements	Enter a run control ID.

Run Control ID The code that uniquely identifies the specific instance of running the report.

Campaign ID Select the campaign to be described in the report.

Campaign Start Date Select the start date of the campaign to be described in the report.

End Date Select the end date of the campaign to be described in the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

Channel Performance Report

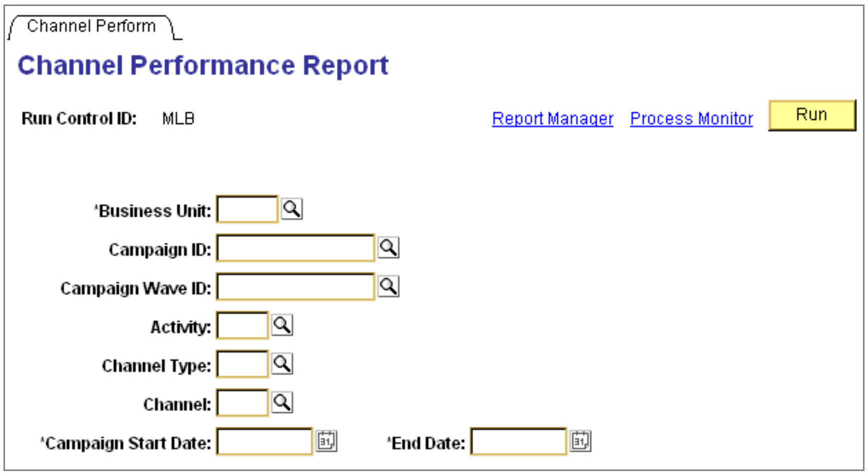
The Channel Performance report displays the number of leads, responses, and quotes generated during waves that you execute using specified channels.

Report ID	RAC3000
Type of Report	Crystal
Source	RUN_RAC3000

Channel Performance Report Run Control Page

Usage	Use the Channel Performance report run control page to run Channel

	Performance reports.
Object Name	RUN_RAC3000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Channel Performance Report**
Access Requirements	Enter a run control ID.



Channel Performance report run control page

Run Control ID The code that uniquely identifies the specific instance of running the report.

Business Unit Select the business unit within which the activities to be described in the report took place.

Campaign ID Select the campaign to be described in the report.

Campaign Wave ID Select the wave to be described in the report.

Activity Select a wave activity.

Channel Type Select a channel type.

Channel Select a channel.

Campaign Start Date Select the start date of the campaign to be described in the report.

End Date Select the end date of the campaign to be described in the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

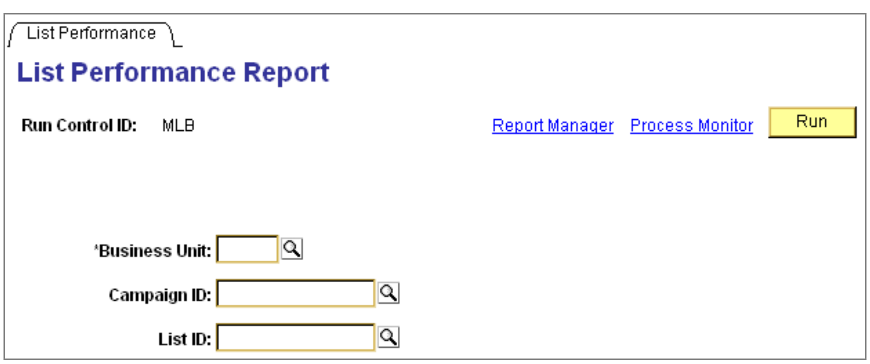
List Performance Report

The List Performance report displays the number of leads, responses, and quotes generated for lists associated with campaigns.

Report ID	RAC4000
Type of Report	Crystal
Source	RUN_RAC4000

List Performance Report Run Control Page

Usage	Use the List Performance report run control page to run List Performance reports.
Object Name	RUN_RAC4000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, List Performance Report**
Access Requirements	Enter a run control ID.



List Performance Report Run Control Page

Run Control ID The code that uniquely identifies the specific instance of running the report.

Business Unit	Select the business unit within which the activities to be described in the report took place.
Campaign ID	Select the campaign to be described in the report.
Report Manager	Click **Report Manager** 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 **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

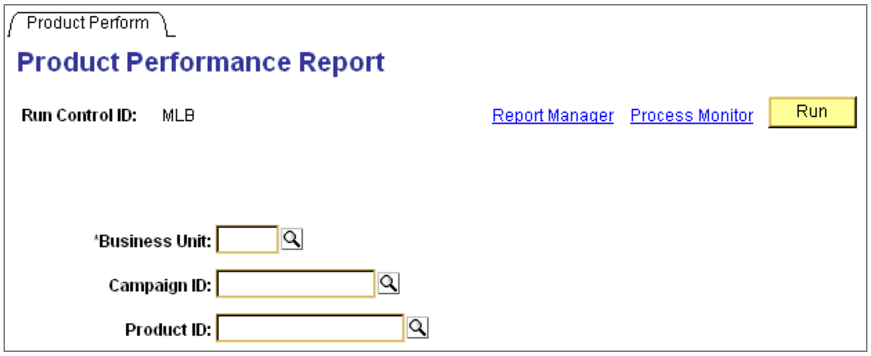
Product Performance Report

The Product Performance report displays information about products associated with campaigns.

Report ID	RAC5000
Type of Report	Crystal
Source	RUN_RAC5000

Product Performance Report Run Control Page

Usage	Product Performance report run control page
Object Name	RUN_RAC5000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Product Performance Report**
Access Requirements	Enter a run control ID.



Run Control ID — The code that uniquely identifies the specific instance of running the report.

Business Unit — Select the business unit within which the activities to be described in the report took place.

Product ID — Select the product associated with the activities to be described in the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

ROI Report

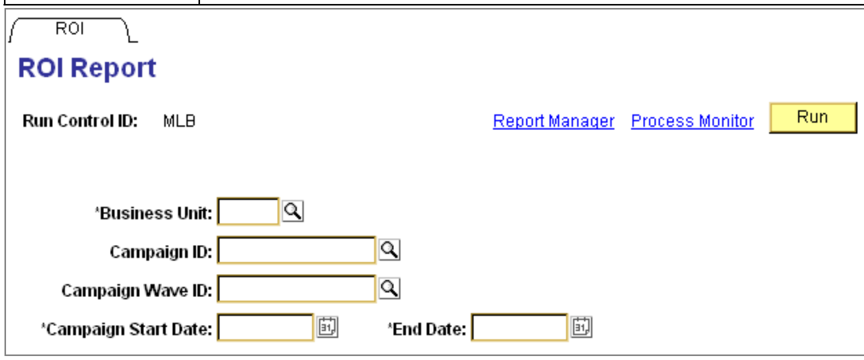
The ROI report displays information about the return on investment of waves.

Report ID	RAC7000
Type of Report	Crystal
Source	RUN_RAC7000

ROI Report Run Control Page

Usage	Use the ROI Report run control page to run ROI reports.

Object Name	RUN_RAC7000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, ROI Report**
Access Requirements	Enter a run control ID.



ROI report run control page

Run Control ID	The code that uniquely identifies the specific instance of running the report.
Business Unit	Select the business unit within which the activities to be described in the report took place.
Campaign ID	Select the campaign to be described in the report.
Campaign Wave ID	Select the wave within which the activities to be described in the report took place.
Campaign Start Date	Select the start date of the campaign to be described in the report.
End Date	Select the end date of the campaign to be described in the report.
Report Manager	Click **Report Manager** 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 **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

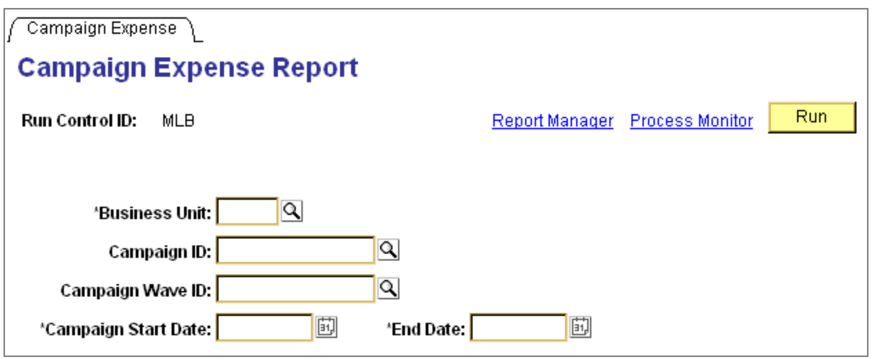
Campaign Expense Report

The Campaign Expense report displays information about campaign expenses.

Report ID	RAC8000
Type of Report	Crystal
Source	RUN_RAC8000

Campaign Expense Report Run Control Page

Usage	Use the Campaign Expense Report run control page to run ROI reports.
Object Name	RUN_RAC8000
Navigation	**Establish Marketing Campaigns, Establish Marketing Campaigns, Report, Campaign Expense Report**
Access Requirements	Enter a run control ID.



Campaign Expense report run control page

Run Control ID	The code that uniquely identifies the specific instance of running the report.
Business Unit	Select the business unit within which the activities to be described in the report took place.
Campaign ID	Select the campaign to be described in the report.
Campaign Wave ID	Select the wave to be described in the report.
Campaign Start Date	Select the start date of the campaign to be described in the report.
End Date	Select the end date of the campaign to be described in the report.

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

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

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