

# **Oracle® CRM On Demand Marketing**

User Guide

Release 5.4.10

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# Preface

This guide covers Oracle CRM On Demand Marketing.

## Audience

This guide is intended for users of Oracle CRM On Demand Marketing and their administrators.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program Web site at

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

## Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Before contacting support, make sure to collect information on the version of Oracle CRM On Demand Marketing you are using. This is available in the Service Information link at the bottom of the page.

## Related Documents

For more information, see the following documents on Oracle Technology Network:

- *Oracle CRM On Demand Online Help*
- *Oracle CRM On Demand Marketing Configuration Guide*

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<i>italic</i>	Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter.

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## What's New in This Release

*Oracle CRM On Demand Marketing User Guide* is one of the documents that supports the Oracle CRM On Demand Marketing application. The following information summarizes the change history of this document.

### **What's New in *Oracle CRM On Demand Marketing User Guide*, Version 5.4.10**

The following table lists changes made in this version of the documentation to support Oracle CRM On Demand Marketing, Version 5.4.10.

**Table 1–1** *Oracle CRM On Demand Marketing User Guide, Version 5.4.10*

Topic	Description
<a href="#">Selecting Web Form Attributes</a>	.Modified topic. Added information about geographic attributes.
<a href="#">Creating Lists</a>	Modified topic. Corrected information on when associated lists can be deleted.
<a href="#">Creating Questions and Defining Answers</a>	Modified topic. Updated information on telephone number formats.
<a href="#">Campaign Summary Report</a>	Modified topic. Updated information on the Campaign Summary report.
<a href="#">Program Summary Report</a>	Modified topic. Updated information on the Program Summary report.
<a href="#">Configuring Phone and Postal Validations</a>	Modified topic. Updated information on telephone number formats.
<a href="#">Configuring Publishing Rules</a>	Modified topic. Updated information on contact and lead publishing.

### **What's New in *Oracle CRM On Demand Marketing User Guide*, Version 5.4.8**

The following table lists changes made in this version of the documentation to support Oracle CRM On Demand Marketing, Version 5.4.8.

**Table 1–2** *Oracle CRM On Demand Marketing User Guide, Version 5.4.8*

Topic	Description
<a href="#">Adding Outbound Email Invitations</a>	Modified topic. Added information about using a third-party vendor.
<a href="#">Associating Registrations</a>	Modified topic. Added information about the European E-Privacy Directive.
<a href="#">Selecting Web Form Attributes</a>	Modified topic. Added information about adding attributes.

**Table 1–2 (Cont.) Oracle CRM On Demand Marketing User Guide, Version 5.4.8**

Topic	Description
Defining Web Form Options	Modified topic. Added information about the branding templates.
Creating Microsites	Modified topic. Added information about the European E-Privacy Directive
Topic Fields in a Microsite	Modified topic. Added information about the European E-Privacy Directive.
About Profiles and Profile Attributes	Modified topic. Revised information on the available profiles.
About the Telemarketing Prospect Statuses	Modified topic. Updated information on the prospect status changes.
Configuring Cookie Consent	New topic. Added a topic on the European E-Privacy Directive using cookie consent.
Creating Campaign Custom Fields	Modified topic. Updated the procedure on creating custom fields.
Creating Program Custom Fields	Modified topic. Updated the procedure on creating custom fields.
About Configuring Object Synchronization	Modified topic. Updated information on the synchronization process.
Configuring the Lead Synchronization Filter	Modified topic. Updated information on the synchronization process.
Configuring Publishing Rules	Modified topic. Updated information on the publication process.
About Synchronizing and Publishing Data	New topic. Added a topic about synchronizing and publishing data.
Using Custom Objects	New topic. Added a topic about using custom objects.
Configuring My Setup Options	Modified topic. Revised information about the setup options and user profiles.

**What's New in Oracle CRM On Demand Marketing User Guide, Version 5.4**

The following table lists changes made in this version of the documentation to support Oracle CRM On Demand Marketing, Version 5.4.

**Table 1–3 Oracle CRM On Demand Marketing User Guide, Version 5.4**

Topic	Description
Launching Static Programs	Added information about email quotas.
Launching Automated Programs	Added information about email quotas.
About Offer Fields	Added information about the Hosting Library.
Working with the Hosting Library	Added information about the Hosting Library.
Operational Usage Reports	Updated information on the reports and their contents.
Website Activity Reports	Added information about new reports.
Available Usage Volume Report	Added information about a new report.
Summary of Website Activities Report	Added information about a new report.



**Table 1–3 (Cont.) Oracle CRM On Demand Marketing User Guide, Version 5.4**

Topic	Description
<a href="#">Website Activity Details Report</a>	Added information about a new report.
<a href="#">Using the Admin Page</a>	Updated information about configuration options.
<a href="#">Editing User Information</a>	Added information on editing user accounts.
<a href="#">About Roles</a>	Added information on configuring user roles.

**What's New in Oracle CRM On Demand Marketing User Guide, Version 5.2**

The following table lists changes made in this version of the documentation to support Oracle CRM On Demand Marketing, Version 5.2.

**Table 1–4 Oracle CRM On Demand Marketing User Guide, Version 5.2**

Topic	Description
<a href="#">Associating Lists with a Program</a>	Updated information about when you associate lists with a program or campaign.
<a href="#">Configuring Publishing Rules</a>	Updated information on how to publish campaign activities

**What's New in Oracle CRM On Demand Marketing User Guide, Version 5.0**

*Oracle CRM On Demand Marketing User Guide*, Version 5.0 is the first version of this new product. The following table lists the chapters in this guide.

**Table 1–5 Chapters in Oracle CRM On Demand Marketing User Guide, Version 5.0**

Topic	Description
<a href="#">Overview of Oracle CRM On Demand Marketing</a>	This chapter provides an overview of <i>Oracle CRM On Demand Marketing User Guide</i> and explains the features.
<a href="#">Managing Campaigns</a>	This chapter describes how to manage campaigns and programs.
<a href="#">Managing Web Sites</a>	This chapter describes how to manage Web sites.
<a href="#">Managing Offers and Templates</a>	This chapter describes how to manage offers and templates.
<a href="#">Working with Contacts and Lists</a>	This chapter describes how to manage contacts and leads.
<a href="#">Managing Activities, Queues, and the Call Center</a>	This chapter describes how to manage contact activities, queues, and call center features.
<a href="#">Using Reports</a>	This chapter describes how to generate reports.
<a href="#">Configuring and Administering Oracle CRM On Demand Marketing</a>	This chapter describes how to configure and customize <i>Oracle CRM On Demand Marketing User Guide</i> .



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# Overview of Oracle CRM On Demand Marketing

This chapter provides an overview of Oracle CRM On Demand Marketing. It contains the following topics:

- [Introduction to Oracle CRM On Demand Marketing](#)
- [Using the Online Help](#)
- [About the User Interface](#)
- [Managing Folders](#)
- [Views Available in Oracle CRM On Demand Marketing](#)
- [About Email and Sales Representative Personalization](#)
- [About Privacy in Oracle CRM On Demand Marketing](#)

## Introduction to Oracle CRM On Demand Marketing

Welcome to Oracle CRM On Demand Marketing, the automated marketing solution that enables you to create comprehensive, marketing dashboards.

Oracle CRM On Demand Marketing enables you to automate all your marketing initiatives while enabling you to align your Sales and Marketing organizations. It also provides 360-degree analytical insight to marketing performance and prospect nurturing. It uses strategic, insightful dashboards that allow you to improve your productivity and quality of your leads. The analytical data delivers comprehensive, authoritative, single-source marketing intelligence.

Oracle CRM On Demand Marketing's lead nurturing solution is designed to generate productive sales leads that boost the sales conversion rate. It provides end-to-end marketing campaign management and response-collection features. It continuously nurtures leads and forwards only the qualified quality leads to the sales stage of the process.

### Lead Generation and Lead Resurrection

Oracle CRM On Demand Marketing focuses on generating highly convertible leads from new prospects, or lead generation, and resurrecting discarded or nonproductive leads back into potential sales opportunities, or lead resurrection.

Oracle CRM On Demand Marketing uses the following solutions for successful lead generation and resurrection:

- **Unified Response Collector.** Oracle CRM On Demand Marketing extracts incremental knowledge at each customer touch point during campaign execution.

The integrated, response-collection process uses progressive profiling to sequentially build customers' and prospects' profiles. A customized algorithm determines when the customer has crossed a critical threshold and is ready to be contacted.

- **Lead Management Module.** Oracle CRM On Demand Marketing performs detailed reporting to pinpoint the critical event or insight that triggered a prospect's readiness to be contacted. At this point, your Sales Department knows what is driving the customer's decision process. Your customers appreciate how well informed your Sales Department is regarding their specific circumstances, and your sales representatives understand the customer's needs before they make the call.
- **Central Campaign Launch Pad.** Oracle CRM On Demand Marketing's campaign execution solution provides detailed specifications of your target audience as well as the ability to launch multistage and multichannel marketing campaigns. You can launch the campaigns immediately, or use Oracle CRM On Demand Marketing to send your campaign automatically at a specified date and time.
- **Real-Time Reporting.** Standard reports display a large quantity of information that helps you to fine-tune future campaigns. They also provide the necessary metrics to adjust the course of a current campaign to make it more relevant and productive to your prospects and customers.
- **Integrated Vendor Ecosystem.** Open APIs allow customers to choose best-in-class services from vendors. Instead of learning the different processing procedures and user interfaces of every vendor, Oracle CRM On Demand Marketing provides a single, consistent interface to work with all vendors for all media channels.

## Using the Online Help

The following topic describes how to use the online help in Oracle CRM On Demand Marketing.

### To use the online help

1. Click Help at the top-right corner of any screen.
2. Type your keywords in the Search box, and click Go.

## About the User Interface

Oracle CRM On Demand Marketing contains the following sections in the main user interface:

- [Navigation Tabs](#)
- [Submenu](#)
- [Logging In to Oracle CRM On Demand Marketing](#)
- [Quick Access Menu](#)

### Navigation Tabs

Oracle CRM On Demand Marketing uses tabs to make each area of the application quickly accessible.

The main tabs in Oracle CRM On Demand Marketing are:

- **Campaigns.** This menu contains campaigns and programs.

- **Website.** This menu contains Web forms, microsites, topics, and recommendation rules.
- **Assets.** This menu contains offers and templates.
- **Contacts.** This menu contains contacts, lists, contact attributes, import contacts, accounts, and opportunities.
- **Activities.** This menu contains contact activities, queues, call center, and opt outs.
- **Reports.** This menu contains operational reports.

### Submenu

The submenu for each tab shows the options available for the selected tab. To preview the functions available within a specific tab without clicking, pause the pointer on a tab, and a list of subfunctions is displayed.

### Logging In to Oracle CRM On Demand Marketing

This procedure describes how to log in to Oracle CRM On Demand Marketing.

#### To log in to Oracle CRM On Demand Marketing

1. Log in to Oracle CRM On Demand, then click the link for Oracle CRM On Demand Marketing.

### Quick Access Menu

The Quick Access menu is located to the left of Oracle CRM On Demand Marketing and provides these key sections:

- **Quick Actions.** You can create new items quickly by selecting from a menu. For more information, see [To create new objects using the Quick Actions menu](#).
- **Recent Items.** You can navigate quickly between your ten most recent activities.
- **Actions.** These are common actions a user might need, such as checking a job status or changing a password.

#### To create new objects using the Quick Actions menu

1. From any screen, click the Quick Actions menu.  
A list of objects (such as attribute, campaigns, contacts, and so on) appears.
2. Choose a new object.  
The appropriate entry screen appears.

### Guidelines for Naming Conventions

This topic provides guidelines for configuring naming conventions. Consider the following:

- Use naming conventions and document them.
- Name folders, for example, name folders by region, by solution area, by industry.
- Include campaign or program type, descriptive text, and date in campaign and program names.
- Use a naming convention for lists that denotes the type of list, for example, test, seed, production, inclusion, or exclusion.
- Document object-naming conventions.

## Managing Folders

Creating a folder structure in Oracle CRM On Demand Marketing helps you to organize entities and business objects, such as campaigns, lists, Web forms, and configuration jobs for importing contacts. You can organize your folder structure by industry segment, geographic region, solution or product line, type of activity or user. You can create multiple, hierarchical levels of folders without any restrictions to the number of folders or the number of levels. The root, or home folder, is at the top level and cannot be changed.

Folders are available to organize campaigns, lists, Web forms, and configuration jobs for importing contacts. You define your folder structure under each of these modules, and you can create the same or different folder structures by module. For example, you can organize lists in folders named for the target audience, while you might want to organize campaigns by product or solution. You can centrally devise a folder structure that takes into account the requirements of all users in an organization and then encourage its use by all users. The folder structure is built as a hierarchical tree.

The defined folder structure appears in the Quick Access Menu. You can collapse or expand the Folders section and the associated subfolders of the Quick Access Menu, as required.

### To collapse or expand the folders

- Do one of the following:
  - Click the plus (+) icon next to the folder name to see all your subfolders.
  - Click the minus (-) icon next to the folder name to collapse the subfolders and show only the high-level folders.

You can perform the following tasks in the folders for campaigns. The same tasks apply to the List, Web form, and Contact Import Configuration folders.

The following procedure shows you how to create a folder.

### To create a folder

1. Find the folder section of the Quick Access Menu.
2. Click an existing folder name to create a subfolder.
3. Click New.

The Add Folder window appears.

4. Enter the folder name, and click OK.

The following procedure shows you how to rename a folder.

### To rename an existing folder

1. Find the folder section of the Quick Access Menu.
2. Select a folder, and click Rename.

The Rename Folder window appears.

3. Enter the folder name, and click OK.

The following procedure shows you how to delete a folder.

### To delete a folder

1. Find the folder section of the Quick Access Menu.

2. Select a folder, and click Delete.
3. Confirm that you want to delete the folder, then click OK.

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**Note:** Oracle CRM On Demand Marketing cannot delete a folder if it contains objects or data.

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The following procedure shows you how to create an object within a folder.

#### **To create an object within a folder**

1. Click the tab and subfunction corresponding to the type of object to create.  
For example, click Websites, and then Webforms.
2. Find the folder section of the Quick Access Menu.
3. Select the folder in which to create the object.
4. Do one of the following:
  - Click the New button to create the new object.
  - Select the new item from the Quick Actions menu.
5. Click Save or Next.

The following procedure shows you how to move an object to a different folder.

#### **To move an object to a different folder**

1. Click the Main tab to see the list of the existing objects and find the object that you want to move.

If necessary, search for the object.

2. Select the object that you want to move.
3. Click Move to Folder.

A window displays a list of all the existing folders in your folder structure.

4. Select the folder to where you want to move the object, then click OK.

The selected object is moved to the selected folder.

## **Views Available in Oracle CRM On Demand Marketing**

A View menu is located on all the main tab screens in Oracle CRM On Demand Marketing. When you click the down arrow a list of views related to each object appears. Selecting a view refreshes the screen with corresponding data, and each view displays a different subset of data and also different related columns. Views are useful when filtering a list when you are performing a search. The views that are available depend on which main list screen you have accessed.

The first time you access a main list screen, check the view, which is displayed automatically. The default view in most cases is either All or Recent. The Recent view displays all objects created or modified within the last 14 days.

Views work in conjunction with folders. For example, if you have a folder structure organized by market segment, and you want to display only the campaigns that you created for the healthcare industry, first click the corresponding folder, and then select either My Campaigns or My Active Campaigns from the view list.

The following table lists all the available views.

Tab Name	Item Name	View Name	Purpose
Campaigns	Campaigns	All Campaigns	All existing campaigns.
Campaigns	Campaigns	Active Campaigns	Campaigns that have a status of In Progress and the current date is between the campaign Start Date and End Date (if specified).
Campaigns	Campaigns	My Campaigns	Campaigns that were either created by you or where you are the owner.
Campaigns	Campaigns	My Active Campaigns	Campaigns with a status of In Progress and with the current date between the campaign Start Date and End Date that were either created by you or where you are the owner.
Campaigns	Campaigns	All Automated Campaigns	All existing campaigns with a campaign type of Adaptive or Dynamic Workflow.
Campaigns	Programs	All Programs	All existing programs.
Campaigns	Programs	My Programs	Programs that were either created by you or where you are the owner.
Campaigns	Programs	Recent Programs	Programs that have been created or modified in the past 14 days.
Campaigns	Programs	Program Registration Config	Programs with the registration configuration defined.
Website	WebForms	All WebForms	All existing Web forms.
Website	WebForms	My WebForms	Web forms created by you.
Website	Microsites	All Microsites	All existing microsites.
Website	Topics	All Topics	All existing topics.
Website	Recommendation Rules	Recommendation Rules	All existing recommendation rules.
Assets	Offers	Active Offers	All existing offers.
Assets	Branding Templates	Branding Templates	All existing branding templates.
Assets	Email Templates	Email Templates	All existing email templates.
Assets	Microsite Templates	Microsite Templates	All existing microsite templates.
Contacts	Contacts	Recently Modified Contacts	Contacts that were created or modified in the last two weeks.
Contacts	Contacts	All Contacts	All existing contacts.
Contacts	Target Lists	All Lists	All existing lists.
Contacts	Target Lists	My Lists	Lists created by you.



Tab Name	Item Name	View Name	Purpose
Contacts	Contact Attributes	All Attributes	All existing attributes.
Contacts	Import Contacts	All Imports	All existing contact import configurations.
Contacts	Import Contacts	Recent Contact Imports	Displays recent (past two weeks) contact import jobs initiated by all users.
Contacts	Import Contacts	My Contact Imports	Displays recent (past two weeks) contact import jobs initiated by the active user.
Contacts	Accounts	All Accounts	All existing accounts.
Contacts	Accounts	Recent Accounts	Accounts updated within the last 14 days.
Activities	Contact Activities	Recent Registrations	Registrations that took place within the past two weeks
Activities	Contact Activities	All Registrations	All existing registrations.
Activities	Contact Activities	Recent Known Website Visitors	Known visitors who visited the Web site within the past two weeks.
Activities	Contact Activities	All Known Website Visitors	All Web site visitors who are also contacts.
Activities	Queues	Recent Queue Assignments	Queue assignments within the past two weeks.
Activities	Queues	All Queue Assignments	All queue assignments.
Activities	Call Center	Open Prospects (Default View)	All open prospects assigned to call center queues for active agent.
Activities	Call Center	Contact Attempted Prospects	Agents have attempted contact but were unsuccessful.
Activities	Call Center	Contacted Prospects	Contact was made with the prospect, but the prospect has not been qualified or is disqualified.
Activities	Call Center	Qualified Prospects	Agents have qualified the prospect for delivery to the Sales Department.
Activities	Call Center	Disqualified Prospects	Agent determined that prospect is not qualified for delivery to the Sales Department.
Activities	Call Center	Pending Follow-up Prospects	Agent has set a followup date to contact the prospect again.
Activities	Email opt outs	Email opt outs	All unsubscribed prospects.

## About Email and Sales Representative Personalization

The ability to personalize content in email messages and Web pages with Oracle CRM On Demand Marketing smart tags, or insertion tags, benefits both a company and its

customers and prospects. Messages targeted at an individual are more relevant and have a higher likelihood of eliciting a response. Personalization can be done through variable insertion or conditional content.

Variable insertion involves inserting the value of a specific variable dynamically, such as a prospect's first name and last name.

Conditional content involves inserting blocks of text in Web page content and applying filter conditions so that text is relevant based on a prospect's profile. For example, you might display strategic content for executive management and display technical content for line management. Conditional content allows the creation of one email campaign and one template for a target audience, including both job levels.

Personalizing emails, landing pages, and Thank You pages is a powerful method to improve user experience and increase the rate at which prospects open and respond to emails. Whenever possible personalize emails with a prospect's name, for example, *Dear John* or *Dear Mr. Doe*. Personalization using other smart tags representing other attributes is also possible with Oracle CRM On Demand Marketing and can be used as applicable. Unfortunately, many marketing managers do not personalize emails, but instead they send emails with generic content, for example, *Dear Customer*, or *Dear Subscriber*.

### **About Email Personalization**

The ability to dynamically insert data from specific fields in a prospect's known profile into email body content is known as *personalization*. For example, your email template for an outbound email program can include *Dear \${Demographic.FirstName}*. This smart tag is for each individual prospect's first name in the contact record. When the outbound email program is launched, the smart tag is replaced by the prospect's first name dynamically at run time, for example, *Dear John*, *Dear Judy*, and so on. You can set a default value to be used for the personalization attribute in the event that there are contacts in your program target list where no value exists for the selected personalization attribute. For example, if First Name is selected, and you suspect that there are contacts included in your list that do not have values in the First Name field, enter the values Customer or Professional or the default value of choice to be used when no value exists in the contact record.

### **About Sales Representative Personalization**

An additional level of email personalization can be achieved for sales-focused campaigns and initiatives. For example, if you know the sales representative responsible for the lead or contact account, emails can be sent with personalized sales representative contact details, such as the email signature, email address and phone number. Personalization helps to start or to build a relationship between sales representatives and their prospective customers by providing a more personalized user experience. Sales representative personalization can be accomplished in the following ways:

- If a campaign is developed in Oracle CRM On Demand Marketing to reach one specific sales representative's accounts, you can embed that sales representative's contact information into your email template.
- If a campaign is developed in conjunction with many sales representatives, you can import or manually assign a contact owner to each prospect in the target list. When contact owners have been assigned, you can include smart tags for contact owner attributes in your template or insert them into your email invitation using the WYSIWYG editor within Oracle CRM On Demand Marketing when developing or editing the email content.

Before using smart tags for prospect attributes or contact owner attributes, check your contact database to make sure the values for the attributes are present. If there is no value in the first name attribute for a prospect, Oracle CRM On Demand Marketing is unable to replace the tag at run time and an email might be sent with the following salutation: *Dear*, leaving a space where the first name would have been.

### **Template Personalization and Optimization**

Smart tags for attributes can be used when creating templates for outbound email messages, microsite and landing pages, postregistration Thank You Web pages and so on. In addition to contact information attributes, smart tags are available for almost every attribute in Oracle CRM On Demand Marketing, including standard and custom attributes pertaining to programs, campaigns and offers.

The following examples indicate when you can use smart tags:

- Use smart tags for offer name, description, offer type and thumbnail image in both the email template and the branding template for landing pages, Web forms, and postregistration Thank You pages. This feature reinforces the offer and provides continuity as a prospect registers and downloads the offer.
- Use smart tags for the program name and description to enhance the campaign branding and subject matter repetition.
- For event campaigns, such as Webinars or seminars, create custom program fields for event date, time, and location. You can then use the smart tags for these custom fields in your outbound email invitation, registration landing page, and confirmation and reminder emails.

Personalization is helpful in achieving optimization of email templates, landing pages, and Thank You pages resulting in reduced maintenance. For example, if your company branding changes, it is easier to update a fixed set of templates than individually updating hundreds of emails. Using smart tags to personalize templates also allows the same template to be used for many campaigns.

### **Localizing the User Interface**

The user interface can be localized so that users can work in their preferred languages.

To change your preferred language, use the controls in Oracle CRM On Demand.

For information on localizing custom fields, see [Localizing Custom Fields](#).

## **About Privacy in Oracle CRM On Demand Marketing**

Oracle CRM On Demand Marketing is an application that enables your company to send emails to external recipients, deploy Web pages visible to the internet, and build Web forms that capture personal customer information. It is important that your company use the application services in an appropriate manner that adheres to international, federal, state, or local laws or regulations relating to individual privacy and the distribution of email and other digital one-to-one communications, such as the United States CAN-SPAM Act.

This topic is provided so that you are aware of what information may be collected about external parties in connection with your use of Oracle CRM On Demand Marketing and how that information may be used by your company's users of Oracle CRM On Demand Marketing and by Oracle Corporation.

Before you may use the Oracle CRM On Demand Marketing application to contact outside recipients, Oracle asks you to acknowledge that your company takes responsibility for ensuring that your email addresses are properly obtained and that

you are properly contacting external parties in accordance with applicable marketing and privacy laws, rules and regulations.

### **How Email Messages are Identified to Recipients**

Through the Oracle CRM On Demand Marketing application, your users can send email messages to external recipients. The email message content that is sent is controlled by what your users create within the email template; therefore, it is important that all your email templates clearly identify your company, including a well-formatted footer with contact information about your company and links to your privacy terms and opt-out process.

The Oracle CRM On Demand Marketing application allows Oracle to setup the application for you so that emails may be identified either with an Oracle-branded domain (for example: crmondemand.com) or a domain name controlled by your company. During the initial provisioning process for your environment, please communicate your intentions regarding this setup option to Oracle Customer Care.

### **What Information is Collected by Oracle About External Parties When Sending Email Messages from Oracle CRM On Demand Marketing?**

When an external recipient opens an email that you send using Oracle CRM On Demand Marketing, information about the message and the recipient's response is directed to one of Oracle's servers and, in some cases, received and relayed by Oracle's email fulfillment provider.

The information collected includes: whether the email was opened, whether a recipient clicked on one of the URLs identified in that email, and whether the recipient unsubscribed from the email campaign that you sent using Oracle CRM On Demand Marketing. Further, information may be collected about whether an email sent to a recipient was bounced or otherwise undelivered.

Information about emails opened by the recipient is tracked by a Web beacon (Web beacons are small pieces of HTML code, including 1 by 1 pixel clear GIF files that are embedded in the emails that sent out by the Oracle CRM On Demand Marketing application). Information about URLs clicked-on in the email body is captured directly by Oracle's Web servers or is redirected from the Web server of Oracle's email fulfillment provider. Unsubscribe requests can be captured through: opt-out links that are relayed by Oracle's email fulfillment provider, Web forms hosted by Web pages that you deploy using Oracle CRM On Demand Marketing, and email replies that are received and relayed by Oracle's email fulfillment provider. Bounced or undelivered mail is detected by Oracle's email fulfillment provider and relayed to the Oracle CRM On Demand Marketing application.

### **How External Recipients Can Opt Out of Email Campaigns**

At all times, a recipient should be able to opt out of an email campaign. Oracle CRM On Demand Marketing provides standard functionality to embed an opt-out link at the bottom of an email. For more information on setting up opt-in and opt-out links, see [About Email Opt Outs](#).

A contact whose Email Permitted field is set to No does not receive any future emails. Oracle CRM On Demand Marketing provides a standard opt-out link you can embed in the footer of all your email messages that automatically sets the Email Permitted field.

If you elect to use a different email configuration to capture opt-outs through other means (for example, capturing preferences through a Web form or a custom link), you should set up your process to update the Email Permitted field so that the automatic suppression is maintained. If you are using an alternative opt-out configuration, you

should also consider creating reusable Exclusion Lists that users can associate to each program to provide further guarantees that suppressions are applied. For more information on using Exclusion Lists, see [Creating Lists](#).

### **Information Collected by Websites and Web Content Hosted by Oracle CRM On Demand Marketing**

The Oracle CRM On Demand Marketing application may collect the following information about external parties as a result of visiting the Web site or visiting a page with embedded components from the Oracle CRM On Demand Marketing application:

- Personal contact and company information
- Communication preferences selected when the contact registers a profile (such as email opt-in)
- Information about a Web visitor's of the Web site gathered through cookies, electronic communication protocols, and Web tracking scripts (Javascript)
- Transactional information

Every time a person visits a Web site hosted by Oracle CRM On Demand Marketing, a session cookie is created and stored at the Web visitor's local computer. A *session cookie* is a text file that stores information specific to the visitor for use by Oracle to maintain the visitor's browser session. The cookie allows the Oracle CRM On Demand Marketing application to track the pages visited, the content items that a Web visitor downloads, and personalize the content that may be displayed to the visitor. The cookie is stored in an encrypted format that is only readable by Oracle CRM On Demand applications, so that an external party cannot extract any contact or session information from it.

Through Oracle CRM On Demand applications your users can create Web forms that can be embedded in a page hosted by Oracle or hosted by our customer. This Web form may capture personally identifiable information about an external party, depending on the questions placed on the Web form by your users. Your users control the questions that appear on a Web form.

The Oracle CRM On Demand Marketing application also sets a cookie for visitors to a Web page hosted outside Oracle CRM On Demand Marketing, where the external page has an embedded content item or Web form (for example, through an iFrame) and that content item is rendered by Oracle CRM On Demand applications.

Oracle CRM On Demand Marketing also provides a Web tracking script (javascript) that your company may add to your other company Web pages, including pages not hosted by Oracle. When this tracking script is present on a Web page, the script enables the Oracle CRM On Demand Marketing application to identify the IP address of the Web visitor, track the Web pages that a Web visitor visits on your other company Web pages, and track the referring source (what site on the internet the visitor came from) including any parameters included. Also, the Oracle CRM On Demand Marketing application sets a cookie for visitors to a Web page where the external page includes the Web tracking script, including Web pages not hosted by Oracle.

Web visitor information, including information submitted on a Web form, is treated as confidential information for your company. More information about how Oracle treats data that it collects and stores in connection with providing services to its customers is available in the Oracle Services Privacy Policy, which is available on the Web at:

<http://www.oracle.com/html/services-privacy-policy.html>

### **Why Does the Website Appear to Come from a Different Company, but the IP Address is Hosted by Oracle?**

Oracle CRM On Demand Marketing allows Oracle Customer Care to setup the application so that the Web pages displayed are branded with your corporate domain or sub-domain. For example, your company may wish for Web pages hosted by Oracle to appear as a blended part of your corporate Web site. The setup for the domain name is a standard part of the initial provisioning process. Please review communications from Oracle Customer Care for details on the setup process.

### **What does Oracle do with the Information it Collects about External Parties?**

Oracle records information collected through email campaigns and Web sites for the customer that initiated the marketing campaign. This information belongs to Oracle's customer, and personally identifiable information collected by the Oracle CRM On Demand applications is not used or shared by Oracle except as necessary to provide the service and as required for legal purposes.

For information about how Oracle's customer may use the information captured by the Oracle CRM On Demand Marketing, Oracle's policy directs all parties to refer to the privacy policy communicated by the customer that is using the Oracle service. Typically, this privacy policy would be provided by your company as a link within an email or Web page created by you.

As part of standard account activation, Oracle does obtain permission to use statistical or aggregate information derived from your use of our technology. More information about how Oracle treats data that it collects and stores in connection with providing services to its customers is available in the Oracle Services Privacy Policy, which is available on the Web at:

<http://www.oracle.com/html/services-privacy-policy.html>

### **How Does One of Your Contacts or Prospects Report Abuse?**

If for any reason an email recipient wishes to decline receiving further email campaigns from you, the recipient may opt out of receiving such campaigns by clicking on the opt-out link at the bottom of the relevant email. If the recipient wishes to respond to any emails you sent using Oracle CRM On Demand Marketing, you should instruct the recipient to contact your company, rather than Oracle. Oracle recommends always including information about opt-out and your company privacy policy as part of each email message you send.

Note that the Oracle privacy policy posted on Oracle.com and CRMOnDemand.com instructs any outside parties that if an Oracle customer fails to address any privacy concerns regarding use of CRM On Demand, then the recipient can contact Oracle at [privacy\\_ww@oracle.com](mailto:privacy_ww@oracle.com). The Oracle policy also states that if an external party has concerns about an Oracle customer's use of intellectual property or other rights in connection with an Oracle hosting service (for example, if an Oracle customer puts unlicensed content into an email campaign or presentation created or distributed through an Oracle CRM On Demand application) and those concerns are not adequately addressed by the Oracle customer, the party may contact Oracle at [copyright\\_us@oracle.com](mailto:copyright_us@oracle.com).

### **Where to Find Out More About Oracle's Privacy Practices**

Further information about Oracle's privacy practices is available on the Web at:

<http://www.oracle.com/html/privacy.html>

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## Managing Campaigns

This chapter covers campaigns and programs. It includes the following topics:

- [About Campaigns](#)
- [About Campaign Fields](#)
- [About Campaign Custom Fields](#)
- [About Campaign Status](#)
- [Creating Campaigns](#)
- [Creating Static Campaigns](#)
- [Working with Campaign Automation](#)
- [About Adaptive Campaigns](#)
- [Creating Workflow Campaigns](#)
- [Associating Campaign Budgets](#)
- [Working with the All Campaigns List](#)
- [Displaying and Editing Campaigns](#)
- [Deleting a Campaign](#)
- [Moving Campaigns](#)
- [About Programs](#)
- [Program Fields](#)
- [About Custom Fields for Programs](#)
- [Selecting Program Types](#)
- [Creating a Program Header](#)
- [About the Import Offline Registrations Program](#)
- [Creating Program Components](#)
- [Associating Lists with a Program](#)
- [Associating Offers](#)
- [Adding Outbound Email Invitations](#)
- [Associating Registrations](#)
- [Configuring Advanced Registration Options](#)
- [Configuring Postregistration Emails](#)

- [Configuring Postregistration Followup](#)
- [Associating Call Scripts](#)
- [About Program Status](#)
- [Testing a Program](#)
- [Launching Static Programs](#)
- [Launching Automated Programs](#)
- [Displaying Program History](#)
- [Displaying the Email Execution Report](#)
- [Displaying the Lead Funnel Report](#)
- [Searching for Programs](#)
- [Editing Programs](#)
- [Deleting Programs](#)
- [Copying Programs](#)
- [Moving Programs](#)

## About Campaigns

A *campaign* is an organized series of individual marketing activities created to communicate with a specific target audience to generate demand for products and solutions, entice attendance to marketing events and raise awareness and interest in your organization's solutions. Oracle CRM On Demand Marketing refers to individual marketing activities as programs within an umbrella or parent campaign. Multiple programs and different types of programs can be included in one campaign. For example, one campaign for a particular product or industry solution might include downloadable white papers, a Webinar series, a new product announcement, a newsletter, online banner advertisements, trade show invitations and even direct mail. All these activities are trackable within Oracle CRM On Demand Marketing enabling marketers to analyze campaign and activity effectiveness, response rates, and other useful metrics.

The following table describes the types of campaigns available.

Campaign Type	Description
Static	Static campaigns are simple, single programs, such as sending an invitation for an event.
Adaptive	<i>Adaptive campaigns</i> are automated campaigns that support complex multiple program executions. Use adaptive campaigns for nurturing prospects and converting them into qualified leads. Adaptive campaigns take advantage of Oracle CRM On Demand Marketing's arbitration engine. Rules are established and are based on a prospect's response to previous campaigns and offers. Oracle CRM On Demand Marketing then determines what offer can be sent to that prospect next to continue to nurture him or her with offers of value and interest.
Workflow	Dynamic workflow campaigns are another type of automated campaign for simple nurture paths. You can diagram the proposed campaign flow using a WYSIWYG editor, drag-and-drop functionality, and diagramming tools.



## About Campaign Fields

When creating a new campaign or editing an existing campaign, some fields require data. These fields must contain entries or Oracle CRM On Demand Marketing cannot save the campaign.

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**Note:** Required fields are indicated with an asterisk (\*).

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The following table gives you a detailed overview of the information required in every field.

Field Name	Field Description
Campaign Name	Unique name for the campaign. The name cannot include a comma (,).
Campaign Code	Unique identifier for the campaign. By default, the name of the campaign is copied into the Campaign Code field with spaces replaced with underscores (_).
Campaign Type	<p>The following lists the campaign types:</p> <ul style="list-style-type: none"> <li>■ <b>Static.</b> The programs for a static campaign are typically scheduled to launch only once on a specific date and to a list of contacts. A snapshot of the list of contacts is created at the time of the program launch.</li> <li>■ <b>Adaptive.</b> Adaptive campaigns are automated campaigns that support the execution of complex, multiple programs. Use adaptive campaigns for nurturing prospects and converting them into qualified leads. For more information, see <a href="#">Creating an Automation Schedule for Adaptive Campaigns</a>.</li> <li>■ <b>Dynamic Workflow.</b> Dynamic workflow campaigns diagram the nurture path that prospects follow. Workflow campaigns send a sequential set of offers to target prospects in a defined order.</li> </ul>
Campaign Description	A description of the campaign.
Location	Location indicates the folder that stores the campaign. Campaigns can be moved to a different folder after they have been created.
Start Date	The start date of the campaign. All programs under this parent campaign must have start dates the same as or after the start date specified for the campaign.
End Date	The end date of the campaign. All programs under this parent campaign must have end dates the same as or before the end date specified for the campaign.
Campaign Priority Value	This field is available for adaptive campaigns and dynamic workflow campaigns only. The Priority Value defines the order in which automated campaigns are sent to a target prospect who is eligible to receive multiple campaigns. Use the Campaign Priority Value to determine the sequence of campaigns. The sequence is based on message importance and relevance to the qualified prospects. When automation rules evaluate the prospect, the campaign priority value is used to select the next campaign to be sent to the prospect.
Campaign Status	The status of any new campaign is Planning. When any program within the campaign is launched, the status of the campaign changes to In Progress. Campaigns can be paused.
Campaign Owner	By default, the campaign creator is assigned as the Campaign Owner. The default value can be changed during the campaign creation or editing process.

Field Name	Field Description
Time-Based Registration Rule	Time-based registration rules bypass repeat registrations for multiple programs when the same prospect tries to access multiple programs within the specified period. The prospect is asked to fill out a Web form for the first program only. For subsequent programs the prospect is taken to the program Thank You page without having to fill in a Web form again. This improves the user experience, lessens the likelihood of repeated Web form questions, and helps prevent registration form abandonment.

## About Campaign Custom Fields

If you want to associate information with campaigns in Oracle CRM On Demand Marketing, beyond what the standard program fields provide, you can create custom fields. Newly created program custom fields have corresponding pregenerated smart tags assigned. This feature enables you to include smart tags for custom fields in templates for email invitations and inbound landing pages, Web forms and Thank You and returning-user Web pages. You enter the information once in the campaign header when creating a new campaign. Then you are able to use the information in multiple ways. For example, depending on your corporate structure and sales channels you might create:

- Corporate division
- Sales channel
- Channel partner
- Fiscal year

To create custom campaign fields, see [Creating Campaign Custom Fields](#).

## About Campaign Status

The campaign life cycle includes four possible states. Newly initiated campaigns have a status of Planning.

The following table lists the values for the campaign status.

Status	Description
Planning	Campaigns have this status while they are being developed, up until the time the campaign or its programs are launched.
In Progress	When a campaign or its programs have been launched, the campaign enters the In Progress status.
Campaign Paused	After a campaign has been launched, it can be paused by clicking Deactivate. The campaign can be relaunched by clicking Reactivate.

## Creating Campaigns

This task is a step in [Process of Creating an Adaptive Campaign Manually](#).

Before creating a new campaign first determine your objective and the required components for the campaign. For more information, see [About Campaigns](#).

### To create a campaign

1. Click the Campaigns tab and click New Campaign.

## 2. Select a campaign type.

Campaign Type	Description
Static	Static campaigns are simple, one time program executions, such as sending an invitation for an event.
Adaptive	Adaptive campaigns are automated campaigns that support complex multiple program executions. Use adaptive campaigns for nurturing prospects and converting them into qualified Leads. Adaptive campaigns take advantage of Oracle CRM On Demand Marketing's arbitration engine. Rules are established based on each prospect's response to previous campaigns and offers, and Oracle CRM On Demand Marketing then determines what offer can be sent to those prospects next to continue to nurture them with offers of value and interest to them.
Workflow	Dynamic workflow campaigns are another type of automated campaign for simple nurture paths. You can diagram the proposed campaign flow using a WYSIWYG editor, drag-and-drop functionality, and diagramming tools.

Selecting the Campaign Type option displays the Campaign Header screen. The information required in the campaign header differs slightly depending on which type of campaign you choose to create. The required fields are indicated with an asterisk (\*). For more information, see [About Campaign Fields](#).

## 3. Click Save.

### Creating a Static Campaign Header

After you have completed the standard campaign header the Campaign Details screen is displayed allowing the creation of the components needed for a static campaign. A campaign must have at least one program. A campaign without a program cannot be launched. The Campaign Finance section is optional.

### Creating an Adaptive Campaign Header

The Campaign Creation Wizard presents the steps to configure an adaptive campaign.

#### To create an adaptive campaign

1. Fill in the Campaign Header fields.
2. Associate the inclusion lists with the campaign.
3. (Optional) Associate the exclusion lists with the campaign.
4. Define the automation rules.
5. Set the automation schedule.

When the Campaign Header information has been completed, there are two choices regarding how to proceed with the creation of an adaptive campaign. Do one of the following:

- To use the Campaign Creation Wizard, click Next.

The Campaign Creation Wizard guides you through the creation of the components. You do not have to associate either inclusion or exclusion lists to proceed to Defining Automation Rules. However, the Automation Rules configuration step includes required fields which must be completed before the Wizard guides you to the Automation Schedule step.

- To create the components manually for an adaptive campaign, click Save.

The Campaign Details screen appears.

Then create the individual components that you require.

6. To create the remaining campaign components later or in the order of your preference, click Save.

### **Creating a Dynamic Workflow Campaign Header**

The Campaign Creation Wizard presents the steps necessary to configure a dynamic workflow campaign at the top of the screen.

#### **To create a dynamic workflow campaign**

1. Fill in the Campaign Header fields.
2. Associate the inclusion lists with the campaign.
3. (Optional) Associate the exclusion lists with the campaign.
4. Diagram the workflow.
5. Set the Automation Schedule.

When the Campaign Header information has been completed, there are two choices regarding how to proceed with the creation of a dynamic workflow campaign. Do one of the following:

- To use the Campaign Creation Wizard, click Next.

The Campaign Creation Wizard guides you through the creation of the components.

You do not have to associate either the inclusion or exclusion lists to proceed to the task, defining automation rules. However, the Automation Rules configuration step includes the required fields that must be completed before the Campaign Creation Wizard guides you to the Automation Schedule step.

- To create the components manually for an adaptive campaign, click Save.

The Campaign Details screen appears so you can create the individual components you need.

6. To create the remaining campaign components later or in the order of your preference, click Save.

## **Creating Static Campaigns**

As with all objects in Oracle CRM On Demand Marketing, each campaign must have a unique name and code. When you enter a campaign name, Oracle CRM On Demand Marketing creates a corresponding campaign code. Use the Campaign Description field to describe the campaign objectives, audience, subject matter, and timing, to let other users on your team learn about your campaign. For more information, see [Creating Campaigns](#).

#### **To create a static campaign**

1. Enter the Header information, and click Save.

The campaign start and end dates are optional. The Campaign details screen appears.

2. Configure the components for the campaign.
3. Add one or more programs.

For more information, see [About Programs](#).

4. (Optional) Add the campaign finance details.

For more information, see [Associating Campaign Budgets](#).

## Working with Campaign Automation

There are two types of automated campaigns: Adaptive Campaigns and Dynamic Workflow Campaigns. You can create them manually or use the wizard.

### Example of Using an Adaptive Campaign

Use an adaptive campaign to create complex, arbitration rules to nurture a prospect over time, basing future actions on the prospect's past activity. By defining inclusion lists, offers and arbitration rules Oracle CRM On Demand Marketing determines all possible paths a prospect might take.

For example, use an adaptive campaign to plan a nurture campaign that continues to send new offers to prospects. The offers are based on their previously specified interests and response behavior. For example, an adaptive campaign might accomplish the following:

- Send white paper one on storage solutions to all prospects who indicated an interest in storage.
- Send white paper two on data security to those who responded and downloaded white paper one on storage solutions.
- Send white paper three on networking to those who did not respond and download white paper one but who also indicated an interest in networking.
- Send white paper four on backup and recovery to those who responded and downloaded white paper two.
- Send white paper five on network security to those who responded and downloaded white paper three.
- Send white paper six, a brief on software as a service (SaaS) to those who have not responded or downloaded any offers.

Note that there are three tracks identified in this campaign:

- Storage in general
- Networking and security
- Software as a service

Based on the rules defined, Oracle CRM On Demand Marketing switches prospects to try to determine what their specific interest might be.

### Example of Using a Dynamic Workflow Campaign

For simpler nurture paths where you are able to map the path that you want prospects to follow, creating a workflow campaign lets you diagram the flow and define automation rules as you draw. For example, a campaign might be planned to send a series of offers on a specific subject to a target audience to build or gauge its level of interest or stage in the sales cycle.

For example, a dynamic workflow campaign might accomplish the following:

- Send a white paper on Network Attached Storage to all prospects who indicated an interest in storage.

- Send a Webinar invitation to all those who registered and downloaded the networking and security white paper.
- Send a trial software offer to all those who attended the Webinar.
- Qualify and distribute all prospects who accepted the trial offer to Sales.

### **Creating Campaigns with the Wizard**

The following procedure shows you how to create workflow and adaptive campaigns with the wizard.

#### **To create workflow and adaptive campaigns with the wizard**

1. Click the Campaigns tab.
2. Click New Campaign on the Campaigns home page.
3. Select either Adaptive or Workflow.
4. Complete the information required in the Campaign Header.
5. Click Next to allow the wizard to guide you.
6. Click Save to save the work you have completed thus far and finish the remaining steps later.

After clicking Save, you can select any of the configuration sections from the Campaign Details screen.

The Priority value determines the relative importance of this campaign compared to other adaptive and workflow campaigns. If a prospect is eligible for more than one automated campaign, Oracle CRM On Demand Marketing picks the one with a higher priority value.

## **About Adaptive Campaigns**

*Adaptive campaigns* are automated campaigns that support complex multiple program executions ideal for nurturing prospects and converting them into qualified Leads. Adaptive campaigns take advantage of Oracle CRM On Demand Marketing's arbitration engine. Rules are established based on a prospect's response to previous campaigns and offers, and Oracle CRM On Demand Marketing then determines what offer can be sent to that prospect next to continue to nurture the prospect with offers of value and interest.

The Priority value determines the relative importance of this campaign compared to other adaptive and workflow campaigns. If a prospect is eligible for more than one automated campaign Oracle CRM On Demand Marketing picks the one with a highest Priority value.

For adaptive campaigns you can choose from three arbitration modes based on the business value assigned to each program within the campaign. The business value determines the order in which programs are sent:

1. Business value in ascending order
2. Business value in descending order
3. Random

### **Process of Creating an Adaptive Campaign Manually**

To create an adaptive campaign manually, perform the following tasks:

1. [Creating Campaigns](#)
2. [Associating Lists with Adaptive Campaigns.](#)
3. [Defining Automation Rules](#)
4. [Creating an Automation Schedule for Adaptive Campaigns](#)

## Associating Lists with Adaptive Campaigns

This task is a step in [Process of Creating an Adaptive Campaign Manually](#).

There are two types of lists that you can associate with an adaptive campaign:

- **Inclusion lists.** They identify the contacts to be included in the adaptive campaign. They can be added in two modes:
  - **Static inclusion lists.** They have a fixed set of contacts that is identified at the time the list is added to the campaign
  - **Dynamic inclusion lists.** They list only the criteria (or conditions) that are considered. A recurring job scans for new or updated contacts that match the dynamic inclusion list criteria and automatically adds them to the campaign.
- **Exclusion lists.** They identify the contacts that are to be excluded from the adaptive campaign. Also, they can exist either in static mode or dynamic mode.

Oracle CRM On Demand Marketing processes an automated campaign inclusion job regularly. This job scans all new and updated contacts to determine their eligibility for all automated campaigns. When new eligible contacts are found, they are added at that time to the automated campaign that they are eligible for, with the highest priority value. When contacts are included in an automated campaign, only specific exit rules can remove them from that campaign. For more information, see [Defining Automation Rules](#).

### To associate a list with an adaptive campaign

1. Click the Campaigns tab.
2. (Optional) To restrict the list of campaigns to show only adaptive campaigns, choose Adaptive from the Campaign Type filter menu.
3. Click an adaptive campaign.
4. Click Inclusion/Exclusion Lists.

A master list of all available lists from which to select appears.

5. Search for the list that you want to add.
6. Place the pointer on the list name.

The Add Inclusion List button appears.

7. Click the button to select the list. Repeat this process to add additional inclusion lists.

Selected lists appear in the right-hand pane. There might be many pages of active Lists to choose from. Then do the following:

- To find a particular list, search by List Name, using Keywords, or select the list type from the list.
- Sort the lists by clicking the Column Name, once for ascending alphabetical order, twice for descending order.

8. Add the exclusion lists in the same manner.
9. If you select the wrong list or change your mind after a list has been selected, pause the pointer over the selected list name in the right-hand pane, and click Remove.

If you have only one list of a type selected for the campaign there is no requirement to remove it before selecting the preferred list. Select the new list on the left. It replaces the previous list.

### About Static and Dynamic List Modes for Adaptive Campaigns

If a list mode is set to Static, Oracle CRM On Demand Marketing takes a one-time snapshot of your inclusion list when the first program in an adaptive or workflow campaign launches. Only those contacts eligible for or meeting the list segmentation criteria at that time are included in the production list for all programs within the campaign.

If the list mode is set to Dynamic, Oracle CRM On Demand Marketing does not consider the existing contacts but begins to monitor new and updated prospects to determine whether they meet the target criteria to be included in the campaign. It adds any new or updated contacts who become eligible after the launch of the campaign. The production list for subsequent programs within the campaign includes all contacts who meet the eligibility criteria each time a program within the campaign executes. To include existing eligible prospects and future eligible prospects, you can associate both a static and a dynamic list with the same segmentation criteria. Also consider whether you need both static and dynamic exclusion lists.

For campaigns where you intend to target future contacts only, use:

- Dynamic inclusion list
- Dynamic exclusion list (if needed to exclude future contacts)

For campaigns where you want to target both existing and future contacts, use:

- Dynamic inclusion list
- Static inclusion list
- Dynamic exclusion list

For more information about lists, see [About Target Lists](#).

Dynamic list mode continues to add newly eligible contacts during the campaign. A contact can be added at any time and therefore does not receive programs and offers in a predefined chronological order. Arbitration rules established for the campaign analyze each contact and determine which program the contact receives.

### Editing Lists for Adaptive Campaigns

You can edit the list mode, start date, and end date from this screen.

#### To edit lists

1. Click the list for List Mode, and make a selection.
2. To edit the start date and end date to set the time range within which the list is in effect, click in the text entry field for the corresponding start or end date.  
  
A calendar appears so you can select the appropriate dates.
3. When you are finished adding lists and editing modes and dates, click Save to complete your list configuration for the campaign.



## Defining Automation Rules

This task is a step in [Process of Creating an Adaptive Campaign Manually](#).

Use automation rules to configure how an automated campaign (adaptive or workflow) executes and sends program offers to prospects depending on list segmentation criteria and contact response behavior.

### To define an automation rule

1. From the Campaign Details screen, click Add in the Automation Rules section, or click the Automation Rules Wizard step at the top of the Campaign Details screen.

The initial Automation Rules screen appears.

2. Click New Rule.

The Campaign Automation Rule Builder screen appears.

3. Enter a name for the new rule.

### Standard Available Triggers

The following is a list of the standard available triggers:

- Contact targeted for a program.
- Email delivered to a contact.
- Email viewed by a contact.
- Contact clicked on an email link.
- Contact started registration.
- Contact registered.
- Contact downloaded an offer.
- Contact is not qualified for more programs. Contact information has been updated or changed so that the contact no longer meets the criteria for a campaign or does not meet the criteria for the next programs within the campaign.
- Always trigger this rule. The rule does not depend on any event trigger or this trigger can be used with Advanced Conditions defined using profiles and attributes.
- Contact enters the automated campaign. (When a contact enters an automated campaign the action triggers immediately.)

### Adding Triggers

*Triggers* are conditions or events upon which you can designate that the campaign execute a particular action. For example, you might have an adaptive campaign designed to offer a series of white papers on storage topics to your target audience. The first white paper is offered in program one for the campaign. Defining automation rules instructs Oracle CRM On Demand Marketing to send white paper two, depending on a contact's response behavior to program one or after a specified period.

Rules are defined to perform an action within a certain specified time after the last trigger event date. If you have a rule based on contact targeted, the rule applies only to those contacts who were targeted but have not taken any action. If a rule is defined based on Contact Started Registration, the rule applies only to those contacts meeting that specific status. The rule does not apply to targeted contacts nor does it apply to contacts who have downloaded the offer. Many rules can be set up to define an action

to take for contacts in each stage or response status. The following is an example of triggers:

- Send white paper one.
- Send white paper two to everyone targeted for white paper one after 30 days.
- Send white paper two to everyone who downloaded white paper one after 30 days.
- Send white paper three to everyone who downloaded either white paper one or white paper two after 30 days.

#### To add triggers

1. Choose a trigger, and click Add.  
You must define at least one trigger, and you can select multiple triggers.
2. Enter the number of days to wait.
3. Choose the starting event for the trigger, either Last Program Target Date or Last Trigger Event Date.
4. (Optional) Set the advanced conditions. Select one of the following:
  - **Send next program (per Arbitration Rules).** Sends the program and selects the program in the current campaign from the list.  
This condition overrules the arbitration rules. Use it if every new contact who becomes eligible for the campaign receives program one first.
  - **Switch Campaign.** Contacts who meet the trigger condition are switched to the indicated campaign.
  - **Exit Campaign.** You must specify a reason for exiting.
5. Click Save.

## Creating an Automation Schedule for Adaptive Campaigns

This task is a step in [Process of Creating an Adaptive Campaign Manually](#).

The automation schedule determines when each program within the campaign is scheduled to execute. Emails are sent to eligible contacts at the time you specify. Oracle CRM On Demand Marketing processes a daily campaign automation job, which checks all automated (adaptive and workflow) campaigns to determine if an action is necessary. It takes into account the automation schedule you define, contact eligibility, and any timing conditions specified in the automations rules. If all conditions are met, it schedules emails to be sent at the next occurrence of the defined automation schedule.

#### To create an automation schedule for adaptive campaigns

1. From the Campaign Details screen, click Configure in the Automation Rules section, or in the wizard steps listed at the top of the screen, click Automation Schedule.
2. Establish the job schedule by selecting reoccurrence (Daily, Weekly, Monthly, Hourly).
3. Select the day of the week or day of the month, if necessary.
4. Choose the hour of the day.

The time zone configured in your user profile appears.

5. (Optional) Select another time zone.

You can now associate products, regions, and campaign finance with your campaign.

## Displaying the Adaptive Email Execution Report

An Email Execution Report is available shortly after a campaign or program has been executed. When you launch a program Oracle CRM On Demand Marketing validates the program configuration, processes the lists, and schedules the program for delivery to the selected email distribution vendor. When the email execution vendor has processed the emails, overview email execution statistics are reported back to Oracle CRM On Demand Marketing, usually within one to two hours after the email delivery occurs.

Automated campaigns generally involve frequent email deliveries as new contacts become eligible for inclusion in the campaign. Oracle CRM On Demand Marketing captures email execution statistics for each individual email delivery and also aggregates results for the entire campaign.

### To display the adaptive email execution report

1. Navigate to the Email Invitations section of the Campaign Details screen.
2. Click the In Progress link to the right of the email invitation.

The Email Execution Report showing the list of completed and scheduled automation appears.

3. Click the linked date and time for individual launch statistics.

The Email Execution Report showing the list of completed and scheduled automation appears.

To display an explanation of categories available, click the green question mark icon in the email execution report section headers.

### About Email Delivery Status Conditions

The following is a list of the email delivery status conditions:

- **Scheduled.** Email delivery has been scheduled for the date you have specified.
- **In-Progress.** The email delivery job is processing.
- **Completed.** The email delivery job has finished processing and emails have been sent successfully.
- **Failed.** The email delivery job has finished processing, but the email delivery has failed.

Additional postlaunch statistics are available within 4 to 8 hours after the email delivery has been executed.

## Creating Workflow Campaigns

*Dynamic workflow campaigns* are a type of automated campaign for simple nurture paths. You can diagram the proposed campaign flow using a WYSIWYG editor, drag-and-drop functionality, and diagramming tools.

### Process of Creating a Workflow Campaign Manually

To create an workflow campaign manually, perform the following tasks:

1. [Creating Campaigns](#)
2. [Associating Lists with Workflow Campaigns](#)
3. [Designing Workflows](#)
4. [Creating Automation Schedules for Workflow Campaigns](#)

## Associating Lists with Workflow Campaigns

This task is a step in [Process of Creating a Workflow Campaign Manually](#).

There are two types of lists that you can associate with an adaptive campaign: inclusion lists and exclusion lists. Inclusion lists identify the contacts that would be included in the adaptive campaign. Inclusion lists can be added in two modes: static and dynamic. Static inclusion lists have a fixed set of contacts that are identified at the time the list is added to the campaign whereas for dynamic inclusion lists only the list criteria (conditions) is considered. A recurring job scans for new or updated contacts that match the dynamic inclusion list criteria and automatically adds them to the campaign.

Exclusion lists identify the contacts that would be excluded from the adaptive campaign. Similar to the inclusion lists, exclusion lists too can exist either in a static mode or a dynamic mode.

### To associate a list with a workflow campaign

1. Click the Campaigns tab.
2. (Optional) To restrict the list of campaigns to show only workflow campaigns, choose Workflow from the Campaign Type filter menu.
3. Click a workflow campaign.
4. Click Inclusion/Exclusion Lists.

A master list of all available lists from which to select appears.

5. Search for the list that you want to add.
6. Place the pointer on the list name.

The Add Inclusion List button appears.

7. Click the button to select the List. Repeat this process to add additional inclusion lists.

Selected lists appear in the right-hand pane. There might be many pages of active Lists to choose from.

To find a particular list, search by list name, using keywords, or select the list type from the list. You can sort the lists by clicking the Column Name, once for ascending alphabetical order, twice for descending order.

8. Add the exclusion lists in the same manner.
9. If you select the wrong list or change your mind after a list has been selected, pause the pointer over the selected list name in the right-hand pane, and click Remove.

If you have only one list of a type selected for the campaign, there is no requirement to remove it before selecting the preferred list. Select the new list on the left. It replaces the previous list.

## About Static and Dynamic List Modes for Workflow Campaigns

If a list mode is set to Static, Oracle CRM On Demand Marketing takes a one-time snapshot of your inclusion list when the first program in an adaptive or workflow campaign launches. Only those contacts eligible for or meeting the list segmentation criteria at that time are included in the production list for all programs within the campaign.

If the list mode is set to Dynamic, Oracle CRM On Demand Marketing does not consider the existing contacts but begins to monitor new and updated prospects to determine whether they meet the target criteria to be included in the campaign. It adds any new or updated contacts who become eligible after the launch of the campaign. The production list for subsequent programs within the campaign includes all contacts who meet the eligibility criteria each time a program within the campaign executes. To include existing eligible prospects and future eligible prospects, you can associate both a static and a dynamic list with the same segmentation criteria. Also consider whether you need both static and dynamic exclusion lists.

For campaigns where you intend to target future contacts only, use the following:

- Dynamic inclusion list
- Dynamic exclusion list (if needed)

For campaigns where you want to target both existing and future contacts, use:

- Dynamic inclusion list
- Static inclusion list
- Dynamic exclusion list

For more information, see [About Target Lists](#).

Dynamic list mode continues to add newly eligible contacts during the campaign. A contact can be added at any time and therefore does not receive programs and offers in a predefined chronological order. Arbitration rules established for the campaign analyze each contact and determine which program the contact receives.

## Editing Lists for Workflow Campaigns

You can edit the List Mode, Start Date, and End Date from this screen.

### To edit lists

1. Click the list for the list mode, and make a selection.
2. To edit the start date and end date to set the time range within which the list is in effect, click in the text entry field for the corresponding start or end date.

A calendar appears so you can select the appropriate dates.

3. When you are finished adding lists and editing modes and dates, click Save to complete your list configuration for the campaign.

## Designing Workflows

This task is a step in [Process of Creating a Workflow Campaign Manually](#).

Use workflow campaigns to diagram nurture paths, using a WYSIWYG graphical editor. Consider creating a workflow campaign if you know the nurture path that you want prospects to follow in advance. Diagramming icons are available for the following:

- **Send program.** Sends the specified program to the contact.

- **Decision.** Defines a condition and then branches to True or False results.
- **Wait.** Specifies the amount of time to wait before continuing the workflow.
- **Switch Program.** Switches the contact to a different program.
- **Exit.** Stops the flow of execution for the selected branch. All branches must end with an exit.

Examples of workflow campaigns include:

- Sending a topical white paper, then invite those who download the white paper to an online Webinar, then offer Webinar attendees a free product trial.
- Sending a series of white papers with a 30-day waiting period between each email execution.
- Nurturing warm contacts or contacts with no activity for a period with a series of white papers to try to generate a response and collect more qualification information.

In each of these examples, you might want to switch nonrespondents to another path or campaign to determine if they are more interested in a different subject.

### To design a workflow

1. From the Campaign Details screen, click Configure in the Automation Workflow section, or click the Workflow Wizard step at the top of the screen.

The Workflow builder drawing board appears.

2. Start the workflow using a start node.
3. Drag nodes from the Node list to the left into the workspace on the right.
4. Connect nodes by clicking the arrow in the center of a node and dragging it to another node.
5. To delete a node, select it, and click Delete Node.
6. Reorganize nodes by dragging and dropping them into a new sequence.

### About Automation Rules and Triggers

Triggers are conditions or events upon which you can designate that the campaign execute a particular action. For example, you might have a workflow campaign designed to offer a series of white papers on storage topics to your target audience over time. The first white paper is offered in program one for the campaign. Defining automation rules instructs Oracle CRM On Demand Marketing to send white paper two depending on a contact's response behavior to program one, or after a certain period of time.

The standard triggers are:

- Email delivered to contact
- Email viewed by contact
- Contact clicked on email link
- Contact registered
- Contact downloaded offer
- Always trigger this rule. (This trigger does not depend on any event.)
- Email might not be delivered to the contact

- Email was not viewed by the contact
- Contact did not click any email link
- Contact did not register
- Contact did not download an offer

Rules are defined to perform an action within a certain specified time after the last trigger event date. To specify the time period after selecting a trigger, add a value in the phrase *Within XX days*.

If you have a rule, Contact Downloaded Offer within 15 days, the rule instructs Oracle CRM On Demand Marketing to select only contacts who completed the download with 15 days after the invitation was sent. Anyone who downloaded the offer after the 15 days passed is not selected according to this rule. You can also insert a waiting period between the rule and the next program execution. This modification does not change the contacts who are selected but delays sending the next program for the defined period.

You can insert multiple conditions in a string. For example, to treat contacts differently depending on the length of time they took to download a white paper, you create a condition for each period.

When defining a fixed path using a workflow campaign, be aware that a dynamic inclusion list adds contacts as they become eligible for the campaign and the campaign starts by sending the first program.

If a program is added midway through the nurture path after the campaign is launched, any contact who has progressed beyond the new program insertion point does not receive the new program.

You might choose to exit or switch contacts from a workflow campaign at any point during the campaign flow. The switch is based on the automation rules and conditions. For example, if an individual contact meets the defined scoring rules and is scored as an A (Very Hot) or B (Hot) lead and is subsequently delivered to Sales for followup, you might want to discontinue nurturing that individual and pass all responsibility for interacting with that contact to the appropriate sales representative. To do so, insert a decision node at the points in the workflow where you want to check for scoring and remove those contacts who have been assigned a score. Insert an exit node at each stage of the automation flow.

## Creating Automation Schedules for Workflow Campaigns

This task is a step in [Process of Creating a Workflow Campaign Manually](#).

The automation schedule determines when each program within the campaign is scheduled to execute. Emails are sent to eligible contacts at the time you specify. Oracle CRM On Demand Marketing processes a daily campaign automation job which checks all automated (adaptive and workflow) campaigns to determine if action is necessary. It takes into account the automation schedule you define, contact eligibility, and any timing conditions specified in automations rules. If all conditions are met, it schedules emails to be sent at the next occurrence of the defined automation schedule.

### To create automation schedules for workflow campaigns

1. From the Campaign Details screen, click Configure in the Automation Rules section, or in the wizard steps listed at the top of the screen, click Automation Schedule.

2. Establish the job schedule by selecting reoccurrence (Daily, Weekly, Monthly, Hourly).
3. Select the day of the week or day of the month, if necessary.
4. Choose the hour of the day.

The time zone configured in your user profile appears.

5. (Optional) Select another time zone.

You can now associate products, regions, and campaign finance with your campaign.

## Displaying the Workflow Email Execution Report

An Email Execution Report is available shortly after a campaign or program has been executed. When you launch a program Oracle CRM On Demand Marketing validates the program configuration, processes the lists, and schedules the program for delivery to the selected email distribution vendor. When the email execution vendor has processed the email delivery, overview email execution statistics are reported back to Oracle CRM On Demand Marketing usually within one to two hours after the email delivery occurs.

Automated campaigns generally involve frequent email deliveries as new contacts become eligible for inclusion in the campaign. Oracle CRM On Demand Marketing captures email execution statistics for each individual email delivery and also aggregates results for the entire campaign.

### To display the workflow email execution report

1. Navigate to the Email Invitations section of the Campaign Details screen.
2. Click the In Progress link to the right of the email invitation.  
The Email Execution Report showing the list of completed and scheduled programs appears.
3. Click the linked date and time for individual launch statistics.
4. To display an explanation of the available categories, click the green question mark icon in the email execution report section headers.

### Email Delivery Status Conditions

The following is a list of the email delivery status conditions:

- **Scheduled.** The email delivery has been scheduled for the date you have specified.
- **In-Progress.** The email delivery job is processing.
- **Completed.** The email delivery job has finished processing and emails have been sent successfully.
- **Failed.** The email delivery job has finished processing, but the email delivery has failed.

Additional postlaunch statistics are available within 4 to 8 hours after the email delivery has been executed.

## Associating Campaign Budgets

You can decide to associate a budget with a campaign. Doing so enables financial reporting on campaigns by line item expenditure and comparison of budgeted costs with actual costs. Associating expected revenue and tracking the opportunity value



associated with a campaign facilitates the calculation of the return on investment for the campaign as well as the cost for each prospect or cost for each opportunity.

Budget items can be added to both campaigns and programs. Program line items roll up to the campaign but are listed separately. The following table defines the fields that apply to both campaign budget line items and program budget line items:

Field	Description
Expected Revenue	Estimated revenue during campaign planning.
Forecasted Revenue	Derived (or entered manually) from opportunities that have been imported into Oracle CRM On Demand Marketing and associated with this campaign and program.
Actual Revenue	Derived (or entered manually) from closed opportunities.
Cost	Calculated by unit (impression). It is a fixed cost.
Adjustment	Might be an additional budget amount added, which can be tracked separately from the overall budget. For example, a business partner contributed \$500 to the cost of the January newsletter.

#### To associate a budget with a campaign

1. Display the Campaign Details screen, and click Add in the Campaign Budget and Expected Revenue Section of the Campaign Details screen.
2. Click Add Line Item.
3. In the Line Item Type menu choose either:
  - Campaign Budget
  - Campaign Expected Revenue
4. Add the estimated budget line items including Type, Name, Applicable Date and budget amount (Do not insert symbols or decimal points).
5. Each line item added appears in the list of Campaign Level Figures.  
After adding each line item the Add Line Item screen refreshes.
6. When you have finished adding line items, click Back.

#### To add program level budget information

1. Create the programs related to a campaign.  
Under the Campaign Finance Details, a section for the program related budget and cost items appears.
2. Click Add Line Item, and fill in the fields.
3. When finished, click Back.  
The Campaign Finance Details screen appears.

## Working with the All Campaigns List

The All Campaigns list displays the campaigns you have permission to display. You can do the following tasks:

- Create a campaign (for more information, see [Creating Campaigns.](#))
- Move a campaign to a folder (for more information, see [Moving Campaigns.](#))

- Edit a campaign (for more information, see [Displaying and Editing Campaigns.](#))
- Copy a campaign
- Delete a campaign (for more information, see [Deleting a Campaign.](#))
- Search campaigns

### **Copying Campaigns**

To copy an existing campaign, complete the following procedure.

#### **To copy a campaign**

1. Select a campaign.

A toolbar with buttons for Edit, Delete, and Copy appears below the selected campaign.

2. Click Copy.

The new campaign opens for editing. For more information about editing a campaign, see [Displaying and Editing Campaigns.](#)

### **Searching Campaigns**

Oracle CRM On Demand Marketing offers several methods for searching campaigns:

- By keyword
- By campaign type
- By date range
- By campaign status

#### **To search by keyword**

1. Select the appropriate folder and view.
2. Enter a keyword or character string in the Campaign Name field or the Campaign Code field.

When using multiple keywords separate them using a comma (,).

3. Press Enter or click Filter.

The search results display the list of campaigns whose name contains the keyword or character string.

#### **To search by campaign type**

1. Select the appropriate folder and view.
2. Search by campaign type by clicking the down arrow next to the Campaign Type list.
3. Select Static, Adaptive, or Dynamic Workflow campaign type.
4. Click Filter.

The search results display the list of campaigns whose campaign type matches your specification.

#### **To search by date range**

1. Select the appropriate folder and view.

2. Search by Start Date or Last Modified Date either by typing a date in the field or clicking the Calendar icon and choosing a date.
3. Click the Option button to search by Date Range or recency: Within the Last xx days.
4. Click OK, and then click Filter.

The search results display the list of campaigns where the start date or last modified date matches the search specification.

#### **To search by campaign status**

1. Select the appropriate folder and view.
2. Search by campaign status by clicking the down arrow next to the Status list.
3. Select Campaign Paused, Planning, or In Progress.
4. Click Filter.

The search results return the list of campaigns whose campaign type matches the search specification.

## **Displaying and Editing Campaigns**

You can display or edit campaign components and details from the Campaign Details screen including: products, regions, campaign automation, campaign finance, and programs. All component sections on the Campaign Details screen are collapsible and expandable using the plus (+) or minus (-) icons.

#### **To display details of a campaign**

1. Click the Campaigns tab.  
The Campaigns Home screen appears.
2. Search for the name of the campaign that you want to display.
3. Narrow your search by selecting a folder and a View option from the list.
4. Click the campaign name to display the Campaign Details screen.

#### **To edit a campaign**

1. Click the Campaigns tab.  
The Campaigns Home screen appears.
2. Search for the name of the campaign that you want to edit.  
As you pause the pointer over the entries in the list of campaigns, dynamic buttons for Edit or Delete follow your pointer.
3. Click the campaign name to display the Campaign Details screen, then click Add or Configure in the section you want to edit.
4. Complete the edits to the campaign header, and click Save.

## **Deleting a Campaign**

You can delete campaigns while they are in the Planning status at any time. The Delete function is disabled for In Progress campaigns. You cannot delete a campaign after any of its programs have been launched.

### **To delete a campaign**

1. From the Campaigns home page, find the campaign that you want to delete.

To find the campaign you can search by keyword or character string in the Campaign Name or Campaign Code field. You can also search using the campaign type, status, or date range.

Dynamic navigation buttons follow your pointer as you pause on the list of campaigns.

2. When the pointer is positioned over the campaign, click Delete.
3. Confirm that you want to delete the campaign.

## **Moving Campaigns**

You can move a campaign from one folder to another to help organize campaigns. You can move multiple campaigns at the same time.

### **To move campaigns**

1. From the Campaigns main list screen, find the campaign that you want to move.
2. To move each campaign, select the check box to the left of the campaign name.
3. Click Move to Folder.

A window appears showing the available list of folders.

4. Select the destination folder, and click Move.

## **About Programs**

A *program* is a component of a campaign that typically defines a single marketing initiative or type of marketing activity, such as direct mail, banner advertisement, seminar, and so on, for a specific target audience type within a larger marketing campaign. A program is always created as part of a campaign. There can be multiple programs of different types (direct mail, email, seminar, and so on) within a single campaign.

### **Guidelines for Programs**

This topic provides guidelines for configuring programs. Consider the following:

- Always test every program with the test list before launching one.
- Add a personal email to the test list to check the external delivery.
- Test the program well before the target launch date to allow time for edits and corrections.

### **Scenario for Launching a New Product**

This topic gives one example of how programs might be used. You might use programs differently, depending on your business model.

The company is launching a new product. A comprehensive strategic initiative (a new product campaign) is defined using multiple programs within the campaign to create awareness among customers and prospects, generate demand, demonstrate the new product, and offer a free product trial of the new product. To achieve this you create the following programs:

- An initial, new product email announcement to existing customers and target acquisition audience (It contains a news release with links to the company Web site.)
- An email invitation to download a white paper or technical brief
- An invitation to Webinars or live seminars for those who downloaded the white paper
- Recorded or custom-demonstration offering more detail on new product functionality offered to those who attended an event
- A free product trial for those who attended a demonstration
- Prospects who request a free product trial are nurtured and converted by Sales

## Program Fields

The following table lists the fields available when creating or editing programs.

Field Name	Field Description
Campaign Name	The campaign to which the program belongs.
Program Name	A unique name for the program.
Program Code	A unique identifier for the program. By default, the name of the program is copied into the Program Code field. Spaces are replaced with an underscore (_). Campaign and program names can contain spaces. However, campaign codes and program codes cannot.
Program Type	Type of program, such as a white paper, Webinar, newsletter. Program types can be defined in the Admin module under the Campaign Management section.
Start Date	The start date of the program must be within the date range configured for the parent campaign.
End Date	The end date of the program. The End Date must be greater than the Start Date. All programs within a campaign must have start and end dates within the date range defined for the parent campaign.
Program Status	The status of a program. During configuration the status is Planning. When the program is launched the program status changes to In Progress. If edits are made to a program after launch (for example, adding repeat invitations) the program status changes to Re-Planning. In Re-Planning mode when you have completed your changes, click Apply Changes to relaunch the program. For more information, see <a href="#">About Program Status</a> .
Business Value	This field applies only to adaptive campaigns and dynamic workflow campaigns. The program business value indicates the defined value of each program within a campaign and determines the order in which programs are sent to qualified target prospects.
Eligible for Microsites	If this flag is set, it enables the program to be associated with a topic or microsite.
Descriptions	Description of the program. There are three description fields: Short, Medium, and Long Descriptions.
Custom Fields	Customers have the ability to define custom fields for programs.

## About Custom Fields for Programs

If you want to associate information with programs, beyond what the standard program fields allow, you can create custom fields. Newly created program custom fields have corresponding smart tags assigned. This feature enables you to include smart tags for custom fields in templates for email invitations and inbound landing pages, Web forms, and Thank You pages, and returning-user Web pages. You enter the information once in the program header when creating a new program and then are able to use the information in multiple ways. For example, for event programs, such as Webinars or seminars, you might want to include information such as:

- Event date
- Event location
- Event time
- Event logistical information

For more information about creating custom program fields, see [Creating Program Custom Fields](#).

You might also want to create program custom fields to use in templates, which improve search engine optimization (SEO). Custom fields might include:

- Meta description
- Meta keywords
- Head title
- Additional meta tags

Custom fields are assigned a smart tag, which enables their use in templates, email messages, landing pages and microsites. The syntax used for a new program custom field smart tag is:

```
${Program.ProgramNewCustomFieldName__c}
```

where:

- Any spaces are replaced with underscores (\_)
- Characters are changed to all capitals
- The name is appended with two underscores and the lowercase letter *c*, for example, \_\_c.

For example, the custom field, Event Date Smart Tag, is \${Program.EVENT\_DATE\_\_c}

When smart tags are created and filled in for a program, the smart tags for these fields can be used in templates for outbound email messages, landing pages, and microsite pages. For more information on smart (insertion) tags, see [About Email and Sales Representative Personalization](#).

Plan for the custom fields that you will require. Do not create new custom fields without a strategy regarding how they are to be used.

## Selecting Program Types

When creating a new program you are prompted to choose the type of program. Selecting the option that best matches your program objective enables the Program Creation wizard to guide you through the necessary configuration steps for the

program type selected. The wizard guides you to configure only the components that you need to accomplish your objective.

### To select a program type using the Program Creation Wizard

1. Select one of the following program types:
  - **Only Send Emails.** For example, a newsletter or product announcements.
  - **Send Emails and Capture Registrations.** For example, Webinar, events, white paper, display or download offer.
  - **Only Capture Registrations.** For example, contact us Web form, demonstration request, online banner advertisement with a display or download offer.
  - **Import Offline Registration.** For example, a program used only to associate registrations captured outside Oracle CRM On Demand Marketing.
2. Select any additional options that you want to configure:
  - Specify Offer
  - Specify Qualification Script

If later in the program configuration process you decide that you want to add additional components, the previous options are available. Return to the completed Program Header screen, and choose the additional options from the Configuration Options section.

3. Click Next.

## Creating a Program Header

The information required to complete a program varies depending on the type of campaign the program belongs to.

### To create a program header

1. Navigate to Campaigns, Program, and then click New Program.
2. Complete the Program Type screen, and click Next.

For information on completing the Program Type screen, see [Selecting Program Types](#).

3. On the Program Header tab, complete the fields.

The following table lists some of the Program Header fields:

Field	Description
Program Code	This field is automatically populated. The data is based on the program name.
Campaign Name	This field is automatically populated when you create a program from within a campaign.
Program Type	Use this field to enable sorting and reporting by program type.
Medium Description	This field can be listed in the More Options section.
Long Description	This field can be listed in the More Options section.

4. When you have completed entering the program header information, click the plus (+) sign to expand the More Options section of the Program Header screen.
5. Complete the additional optional fields.

Field	Description
Eligible for Microsites	If this flag is set, it enables the program to be associated with a topic or microsite.
Program Business Value	This option is for adaptive campaigns only.
Allow Multiple Registrations	This option accommodates forms, such as Contact Us or Update Your Profile, when you want to permit the same contact to submit the form multiple times. This option is for programs that do not already specify a registration configuration option.

6. When you have completed the necessary fields on the Program Header screen, you have two options through which you can proceed with program configuration:
  - Click Next to save the Program Header and move to the first configuration step guided by the wizard.
  - Click Save to save the Program Header and display the Program Details screen.

You can configure the necessary program components from the Program Details screen in whatever order you choose.

## About the Import Offline Registrations Program

The Import Offline Registrations program type option enables you to create a program to accommodate offline registrations by configuring only the program header. It is not necessary to configure an inbound registration flow. If you frequently have the need to import registrations captured outside Oracle CRM On Demand Marketing, one option is to use the Import Offline Registrations program type. All registration information stored in contact records in the database must include an association with a program existing in Oracle CRM On Demand Marketing. The Import Offline Registration program type requires only the configuration of program header information, there is no need to configure the entire inbound registration flow.

You can use this program type to import the following:

- Registrations (form submits) from a generic Contact Us form on your corporate Web site
- Registrations from an online Profile Update form on your corporate Web site
- Registrations provided by an event organizer where you do not have event-related campaigns and programs already defined
- Registrations from certain types of online advertising require that the Web site capture the registrations, and then pass them to the advertiser, using reports or spreadsheets

## Creating Program Components

Program components include lists, offers, outbound email invitations, inbound registration Web forms and associated postregistration emails and Web pages, and



prospect qualification scripts. You can use the Program Configuration wizard, which guides you through all possible program components or use the Program Details screen and create specific program components.

## Associating Lists with a Program

A focused, segmented list for a program is important to yield the best prospects. List association is optional for a program. However, if outbound messaging is intended, a list must be associated with the program. The list association with a program is the same for all types of lists; multiple lists can be added at one time. Programs can have multiple lists associated, which include the following:

- **Production List.** The production list includes contacts targeted to receive the outbound email when the program is launched.
- **Seed List.** The seed list includes contacts internal to the company who receive the outbound email at the same time prospects receive the email. Seed lists are optional and used to notify team members, management, or the Sales Department that the program has been sent to target prospects.
- **Test List.** The test list includes the campaign owner and other internal marketing contacts who are designated to review and test the program for accuracy before launch. You must always test every program thoroughly to make sure all processes and components are in place and working perfectly.
- **External List.** An external list can be a rented list purchased from an outside vendor, or it can be a list provided by a business partner for use with a particular program. Oracle CRM On Demand Marketing tracks only the list record count for each external list to report on response percentages and other metrics.
- **Exclusion List.** The list of contacts to be excluded from a program, for example, opt outs from previous email campaigns, known invalid email addresses, and so on. An exclusion list might also contain contacts targeted by another outbound program, which is planned for execution during the same period, preventing those contacts from receiving two outbound messages within a short time period. Multiple exclusion lists can be associated with a program. At run time, Oracle CRM On Demand Marketing evaluates the production list and then excludes from it the contacts that match the exclusion list criteria.

Programs that belong to static campaigns can use all lists. However, if you are designing an adaptive campaign or a workflow campaign, you must associate the lists with the campaign, and not with the campaign's programs. For more information, see [Associating Lists with Adaptive Campaigns](#) and [Associating Lists with Workflow Campaigns](#).

### Working with Lists

There can be many pages of active lists to choose from. Global exclusion lists are added by default to the program when a production list is associated with the program. Exclusion lists are applied only to the production list: exclusion lists are not applied to test lists and seed lists. Nonglobal exclusion lists must be associated in the same manner as production lists, test lists, and seed lists.

### To find a specific list

- Do one of the following:
  - Search by the list name, using keywords
  - Select the list type from the list that you want to filter to a certain type of list.

If you do not see a list displayed, you can create a list at this point. A list must be accepted to be eligible for association with a program.

You can sort lists by clicking the Column Name, once for ascending alphabetical order, twice for descending order.

**To associate a list with a program from the Program Details screen**

1. Navigate to the Lists section of the Program Details screen.

2. Click Add.

The List Association screen appears.

3. Search for a list to add.

4. Place the pointer on the list name.

A button appears labeled: Set as [List Type] List, for example, Set as Production List.

5. Click the button to select the list.

6. To add other lists to this program, repeat Step 2 through Step 5.

The selected lists appear in the right-hand section.

7. When list association is complete, click Save.

The Program Details screen appears.

**To delete a list**

1. Click the Delete button to the right of the List section.

2. Confirm your request to delete the list from your program configuration.

**To create a list**

- Click Create New List.

**To remove a selected list**

1. Place the pointer on the list name in the Selected for this Program section.

A Remove button appears.

2. Click Remove.

**To refresh a list count**

- Click Refresh.

The estimated count reflects the number of contacts to whom the outbound email was sent when the exclusion lists were applied.

**To display or export a list from the Program Details screen**

- Click the List name link.

The List Details screen appears with the View and Export options.

**Editing List Conditions**

You cannot edit list conditions from the Program Details screen. Instead, use the following procedure.

**To edit list conditions**

1. Make a note of the list name.
2. Click the Contacts tab.
3. Select the Target Lists function.
4. Find the list that you want to edit, and click the linked list name.

The list has a status of Accepted, so the Edit button is disabled, and you are unable to edit the List Header information.

5. From the List Details screen, click the Edit icon (pencil) next to the Filter List Condition.

## Associating Offers

When a program offers an incentive, invitation or information in exchange for registration, an offer can be configured and associated with the program. An offer might be:

- A white paper, technical brief, article, customer success story
- A Webinar, trade show, or other event
- A product demonstration or free trial

There might be many pages of active offers to choose from.

**To find a particular offer**

- Search for the offer name, using keywords or a character string or search by offer type.

You can sort the list by clicking the Column Name: once for ascending alphabetical order, twice for descending order.

**To associate an offer with a program from the Program Details screen**

1. Do one of the following:
  - Follow the wizard to the Offers Step.
  - Navigate to the Offers section of the Program Details screen.

2. Click Add.

The Offer Association screen appears.

3. Search by offer name or offer type for an offer.

Dynamic navigation buttons follow your pointer as you pause on the list of offers.

4. To select an offer, click its Add Offer button.

The offer appears under Selected Offer for this Program.

5. To remove or replace a selected offer, pause the pointer on the selected offer.

A Remove button appears.

6. Click Remove.

The Program Details screen displays the details of the selected offer.

7. When finished, click Save.

**To create an offer**

1. Click New Offer.

The Offer Edit page appears.

2. Enter the information, and then click Accept.

Only offers that are accepted can be associated with a program.

3. When the offer configuration is complete, click Save.

The Offer Association screen is displayed.

4. Select the newly created offer, and click Save.

The Program Details screen is displayed. The newly associated offer appears in the list.

You can edit an offer from the Offer Selection screen. Before making edits be sure to check if other programs are using the offer and that the intended edits are appropriate for all programs with which the offer is associated. For more information, see [Editing Offers](#).

## Adding Outbound Email Invitations

You can add outbound email invitations using the Program Details screen or by navigating to the email configuration step in the program wizard flow.

**To add outbound email invitations from the Program Details screen**

1. Navigate to the Email Invitations section of the Program Details screen, and click Add.
2. If adding an initial invitation, click Add in that section.
3. If adding a repeat invitation, click Add in that section.

**To add outbound email invitations**

1. If you have a third-party vendor defined, then you can select the Send Emails from the Third Party Vendor.

Third-party vendors must be configured by Customer Care. If none are configured, then this option does not appear on the Email Invitations page.

2. Select the Email From Address from the list.
3. If you intend to send emails using the contact owner's email address, then select the Use Contact Owner's From Email Address check box.
4. Select the email execution date.
5. Enter the Email Invitation Subject Line.
6. Select the character set.

The most commonly used character set is Unicode (UTF-8).

7. Choose whether to use a template created for the Email Invitation or to create the Email content using the editor.
8. If you are using a template created outside Oracle CRM On Demand Marketing, select the Template Name from the list of available templates.

The template loads into the editor.

9. To edit the content of the template, click the Edit Template link to the right of the Template list.

The screen refreshes in edit mode. You can edit using the HTML editor or the Plain Text editor. The HTML editor is the default editing mode and allows content to be edited without requiring knowledge of HTML code. The Plain Text editor allows edits to be made to the template's HTML code.

10. Complete the necessary edits.

In HTML Email you can either select an existing template or create a new template by selecting Create Content. The editor enables you to create your own template along with the options of inserting personalization attributes, hyperlinks, and using standard formatting, such as bold, italic, font size, and so on.

11. Add personalization attributes by selecting the Personalization Profile from the left list, for example, Demographic. Then select the attribute from the right list, for example, First Name.

12. Click Insert.

13. Set a default value to be used for the personalization attribute in the event that there are contacts in your program target list where no value exists for the selected personalization attribute.

For example, if First Name is selected, and you suspect that there are contacts included in your list that do not have values in the First Name field, enter Customer or Professional or the default value of choice to be used when no value exists in the contact record.

Many attributes are available for personalization, including Personalized Pretty URLs, which cause Oracle CRM On Demand Marketing to recognize returning contacts and prepopulate existing profile information in a Web form.

14. Complete the necessary edits for the HTML Email Invitation, then copy and paste the content into the space for the Text Email Invitation.

The tag `${Demographic.FirstName}` is converted into the first name of each contact in the List at run time.

For the Text Email version all links must be listed in full as absolute paths. No formatting is carried over from the HTML content to the Text Email Invitation, so double-check the line spacing, indents, and bullets, and then correct them, as needed.

### Using Email Signatures

You can personalize your outbound email message to appear as if it is being sent by a member of your company, for example the sales representative responsible for the account. To use an email signature, see [Configuring My Setup Options](#).

If you select the ContactOwner Email Signature Attribute, the default value area displays a list with the default signatures. If the contact does not have a contact owner, the default email signature is used. The default personalization attributes enable you to configure the default values for personalization attributes in the outbound program emails. The default value is used if no value is found in the contact's profile field used for personalization.

### Inserting the Forward to a Friend Option

Forward to a Friend is available for inclusion in outbound email invitations. Forward to a Friend must be configured globally for each account by clicking Admin, then clicking Forward to a Friend under Email Management.

### **To insert the Forward to a Friend option for an email invitation**

1. Click Select Profile to display the profile list of personalization attributes, and choose Program.
2. Select the Forward to a Friend attributes in the right hand Attribute list, and click Insert.

The Forward to a Friend tag is inserted at the point where your pointer was positioned immediately before clicking Insert.

### **Adding Repeat Email Invitation to Nonregistrants**

You can send several repeat invitations to remind targeted prospects to register, particularly in the case of a time-sensitive event. Repeat invitations are configured in exactly the same way as initial invitations and the content from an initial invitation can be copied to create the repeat invitation. You can use a slightly different subject line for each repeat invitation.

Consider scheduling a repeat invitation one week after the initial invitation was sent, then schedule an additional repeat for each following week, until the event date.

### **Adding repeat email invitations to a program**

1. In the Email Invitations section of the Program Details screen, click Add.
2. In the Repeat Invitations to Non-Registrants section, click Add.
3. Configure the Repeat Invitation in exactly the same way the initial invitation was created.
4. Enter the content or click the Copy From Initial Invitation link.

Oracle CRM On Demand Marketing populates all fields from the Initial Invitation except the Email Execution Date.

5. Set up the Email Execution date and time for the Repeat Invitation.
6. Click Save when finished.

## **Associating Registrations**

Any program requiring registration must include the association of a Web form configured in the registration section of a program. Web forms can also be used to survey target contacts about the value or relevance of an offer or product. Web forms can be created to capture registrations for events or attribute information for contacts that can then be used in progressive profiling and list segmentation for future campaigns and programs. Campaign owners can also create a Web form for followup, allowing prospects to submit their evaluation.

### **To associate an inbound response registration**

1. Navigate to the Program Details Screen.
2. In the Registration section of the Program Details screen, click Configure.
3. On the Inbound Response screen, add the following options by clicking Configure for each one:
  - Branding and Preregistration Page
  - Registration Form
  - Post Registration Page

- Advanced Registration Options
- Followup

### Configuring the Branding and Preregistration

A branding template, when applied to inbound registration, governs the appearance of the preregistration landing page, the Web form landing page and the postregistration Thank You and returning user Web pages. Preregistration landing pages do the following:

- Provide more information to prospects before directing them to the registration form.
- Announce the end of registrations for an event that has occurred.
- Offer links to multiple assets for downloading. In this case, each asset or offer must have a unique pretty URL if registration is required for each offer.

If a Preregistration landing page is necessary, options exist to use a URL for an existing Web page or create content using the same WYSIWYG editing tool, as in the Email Invitation configuration process.

### To configure branding and preregistration

1. Enter the Registration Pretty URL.

The Pretty URL text must not contain spaces. Use a name for the pretty URL, which reflects the program content and is easy to remember during testing.

2. Select the Program Branding type from among the three choices by selecting the appropriate option button:
  - No branding required.
  - Use a template. Then select a template from the list.
  - Use a URL. Then provide the URL in the window that appears.

Branding specified at this step is associated with the Registration Form, the Thank You Web Page and the Returning User Web Page.

3. To display a branding template, click the Preview link.
4. Determine whether a Preregistration landing page is needed.
5. If you must comply with the European E-Privacy Directive and your company is using selective enablement of cookie consent, and if this program is a program where you want to enable cookie consent, then select the Enable Cookie Consent check box.
6. Select any necessary registration configuration options from More Options.
7. Select the appropriate option button for Override time based Registration.
 

If Yes, this rule overwrites the time-based registration rules and makes the program registration mandatory for all visitors of the program pretty URL.
8. Select the appropriate option button for Allow Multiple Registrations.
 

Allowing multiple registrations is helpful during program testing. However, you can deselect it before the program launch.
9. Select the registration language from the list.

English is the default language. Choosing another language translates the run-time prompts.

10. When all options are configured, click Save.

### **Associating a Web form with a Program**

#### **To associate a Web form with a program**

Complete the following procedure.

1. Follow the wizard to the Inbound Registration-Registration Form step, or click Configure in the Registration Form section of the Inbound Registration configuration screen.
2. Search for the Web form using keywords in the form name or description.
3. Select the Web form by clicking the Add WebForm dynamic navigation button.  
The selected form appears on the right.
4. Click Save.  
The Inbound Registration screen displays with the Web form listed.

### **Configuring a Postregistration Web Page**

Complete the following procedure.

#### **To configure a postregistration Web page**

1. From the Inbound Registration screen, select Configure in the Post Registration Page section.  
The Post-Registration Page screen appears.
2. Choose to configure a URL or content, using the WYSIWYG editor just as you would modify invitation content of an email.  
If you are using a URL, it must be a complete path.
3. Click Save.

## **Configuring Advanced Registration Options**

You can configure advanced registration options, such as a limit on the number of registrants, and start and end dates for a registration period.

#### **To configure advanced registration options**

1. From the Inbound Registration screen, select Configure in the Advanced Registration Options section.
2. To limit the number of registrations to be accepted:
  - a. Click the check box for Limit Number of Registrants, and enter the maximum number of registrations allowed.
  - b. Enter a Sorry page URL, or create a Sorry page by selecting the Content option button.  
A Sorry page tells visitors that registrations for this program or event are closed and redirects them to a page with more information. Create Sorry page content, using the WYSIWYG editor. Personalize the Sorry page by selecting personalization attributes from the list, and then clicking Insert.
3. To configure a Dark Date and URL:



A Dark Date is the day that registrations are no longer accepted. For example, you may allow registrations for only the first 10 days of a month.

- a. Select the check box for Registration Dark Date Configuration.

The program start date and program end date appear.

- b. Enter a registration start date that is not earlier than the program start date.
- c. Enter a registration end date that is not later than the program end date or earlier than the registration start date.
- d. For the Dark Date, select either the URL or Content option buttons.

Contacts who attempt to register after the registration end date and time are redirected to the Dark Date URL. You can also create a Dark Date Web page by clicking Content and entering text and personalization attributes in the standard manner.

4. Click Save.

## Configuring Postregistration Emails

You can configure the following postregistration emails:

- Postregistration Thank You Email
- Notification Email
- Reminder to Registrants

### To configure postregistration Thank You email

1. From the Program Details screen, click Post Registration Emails in the Wizard flow at the top of the screen.

The Post Registration Emails configuration screen appears.

2. Select the check box, Send Post-Registration Thank You Email to the Registrant.

The screen reloads displaying the fields necessary to configure the Thank You email along with the WYSIWYG editor for entering content.

3. Select From Address from the list.
4. Enter the Reply To Email address.
5. Enter the Thank You Email subject line.
6. Select either the Use Template or Create Content option button:
  - a. If you selected Use Template, choose a template from the list.

The template loads into the editor.

- b. If you selected Create Content, the WYSIWYG editor loads.

7. When finished editing, copy and paste the content from the HTML email to the test email.
8. Click Save.

The Post-Registration Emails screen appears.

### To configure a notification email

1. From the Program Details screen click Post Registration Emails in the Wizard flow at the top of the screen.

The Post Registration Emails configuration screen appears.

2. From the Post-Registration Emails screen, click Configure in the Notification Email section.
3. Enter the To email address.
4. Select the From email address from the list.
5. Enter a subject line.
6. (Optional) Select Personalization Attributes.
7. (Optional) Enter a note, and click Save

#### **To configure a reminder email to registrants**

1. From the Program Details screen click Post Registration Emails in the Wizard flow at the top of the screen.

The Post Registration Emails configuration screen appears.

2. From the Program Details screen, click Configure in the Post-Registration Emails section.
3. From the Post-Registration Emails screen, click Configure.
4. Enter the From Email address.
5. Enter the Reply To Email address.
6. Set the timing for the reminder email to be sent.
7. Enter the subject line for the reminder email.
8. Select one of the following to create the content of the reminder email:
  - Select the option for Use Template, and select a template from the list.
  - Select the option for Create Content, and enter the message.
9. Click Copy from Initial Invitation link.

The contents are copied to the editor.

10. Make any necessary edits, and click Save.

The Post-Registration Emails screen appears.

11. To return to the Program Details screen, click Back.

## **Configuring Postregistration Followup**

To configure the postregistration followup, complete the following procedure.

#### **To configure postregistration followup**

1. From the Program Details screen click Configure in the Inbound Registration section.
2. From the Inbound Registration screen, click Configure in the Followup section.
3. Enter the follow up URL.
4. Select one of the Program Branding options:
  - No Branding Required
  - Use a Template

- Use a URL
- 5. If you opt to use a template or URL, specify the template or URL to use.
- 6. Select a Web form from the menu.
- 7. Enter the Thank You Page URL.
- 8. Click Save when complete.  
The Inbound Registration screen appears.
- 9. To return to the Program Details screen, click Back.

## Associating Call Scripts

The Qualification Script section of a program provides the ability to associate a call script with a program. A *call script* is specific to the subject matter of the program. It provides Sales with additional questions and information for prospects during phone calls for qualifying leads. In addition, a call script might include questions and attributes allowing sales representatives to verify the contact information for each prospect. To facilitate the validation of the current information on contacts, set these attributes to prepopulate the call script form. A call script form is available for call center representatives to capture any additional qualifying information for every prospect. Call scripts are configured in the same manner as registration Web forms, with the exception that call scripts are intended for an internal audience and questions can be worded differently.

### To associate a call script form

1. Depending on the options that you chose, one of the following applies:
  - If you checked the Specify Qualification Script check box when the program was initially created, the Program Creation Wizard guides you through the procedures of associating a call script form.
  - If you did not select Specify Qualification Script during the initial program creation and the script must be added later, click the Program Header, and select the Specify Qualification Script check box to add the configuration of this component to the program.
2. Click Save to return to the Program Details screen and proceed to the Qualification Script section of the Program Details screen.

### To associate a call script

1. Do one of the following:
  - Follow the wizard to the Qualification Script step.
  - Click Add in the Qualification Script Section of the Program Details screen.
2. Search for the call script Web form using keywords in the form name or description.
3. Select the script by clicking the Add WebForm dynamic navigation button.  
The selected form appears.
4. Click Save.  
The Program Details screen loads the call script.

## About Program Status

The following table describes the program status values.

Status	Status Description
Planning	Programs are configured when they have a Planning status. Programs are tested in planning status. Outbound invitation emails are not sent in this status.
In Progress	A program has a status of In Progress after the program has been successfully launched.
Re-planning	If a program is modified after being launched, it is assigned Re-Planning status. When you have retested the program, click Apply Changes to relaunch the program and the status updates to In Progress.
Hold	Canceled programs are identified with a status of Hold.

Programs stay in the In Progress status even after their end date is passed. To explicitly turn off registration for programs after a specific date, use a dark date. For more information on dark date, see [Configuring Advanced Registration Options](#).

## Testing a Program

After creating a program and all the related components, you can test the end-to-end flow of the program, including the emails and registration forms. Make sure you have configured the following sections of the program:

- Outbound invitation email for both HTML and text versions. For more information, see [Adding Outbound Email Invitations](#).
- A test list must be associated with the program. For more information, see [Associating Lists with a Program](#).

### To test a program

1. Navigate to the Program Details screen for the program that you want to test, using one of the following options:
  - Click the Campaigns, Programs, and then search for the program name.
  - From within the Campaign Details screen, click the Edit icon (pencil) to access the program.

2. Verify that all components needed are configured correctly, then click Test.

While testing a program, a progress bar for monitoring test-email execution appears. When the test is successfully executed, Oracle CRM On Demand Marketing displays a message stating that the test has been successfully sent. Oracle CRM On Demand Marketing allows testing only when the program is in the Planning or Re-planning status.

When the test starts, Oracle CRM On Demand Marketing sends emails to contacts included in the test list. Test contacts can check their email inboxes for the test message, then verify every aspect of the test for accuracy, correct performance, and flow, including:

- Proofreading the test email message
- Clicking all links in the email message
- Completing the registration Web form (if configured)

- Receiving the Thank You Web page after the form is submitted (if configured)
  - Receiving the Thank You email (if configured)
3. Make changes and retest, as needed.

If registration is part of the program being tested, it is helpful to have a notification email configured. This email allows the program owner to see the test registrations as they are submitted. When the program has been thoroughly tested and is performing perfectly, it is ready to launch.

## Launching Static Programs

When a program that is part of a static (regular) campaign has been thoroughly tested, it is ready to launch. A program can be launched days or weeks before its first outbound email execution date. Programs with inbound registration only must be launched also.

### To launch a program

1. From the Program Details screen, click Launch Program.

The Launch Confirmation window appears requesting confirmation of the launch intent. It requests email addresses to notify when the program launch has completed; that is, it is either a successful launch or failure.

Oracle CRM On Demand Marketing automatically fills in the email address of the campaign or program owner.

2. (Optional) Enter additional email addresses.
3. Confirm by clicking Launch Now or cancel the launch.

### About Program Launch

*Program launch* is an asynchronous process, meaning that the preprocessing of lists and program execution scheduling are performed in background mode. When you launch a program, you can move on to other tasks while the launch processes are executed. As each step in the list and program is performed, progress can be displayed by clicking the linked program status in the program header section. When program status changes to Program launch in Progress, clicking the linked status displays the launch steps, status, and date and time when each step is completed. This launch progress feature enables you to keep track as the program proceeds through the launch processing steps. Launch Progress shows all the steps executed in ascending order, including the start and end times and list counts. Pending steps are displayed with Pending status.

The program remains in Launch in Progress status while lists are being processed and the email execution is being scheduled. During this time, a Stop Launch link appears next to Program Launch in Progress, allowing you to stop the processing, if necessary.

As preprocessing advances, the program status in the program header (Program launch in progress) becomes a hyperlink. You can click the hyperlink to display the launch progress as each step is processed. Launch progress displays the following stages with start and end times. If the program is scheduled to launch immediately or the lists are small, processing is handled quickly.

### About Email Quotas

The number of emails that your organization can send is limited. Your organization purchases a specific amount, called your email quota. Before each job is launched,

Oracle CRM On Demand Marketing checks to make sure that the job will not exceed your email quota. Test emails do not count against your quota. You can use the Available Volume Report to see what your email quota is and how much of it is remaining. For more information, see [Available Usage Volume Report](#). When you approach your email quota, a warning message appears in the left panel letting you know if you are at 70%, 80%, 90% of your email quota or have exceeded your email quota.

### Actions Available While a Launch Is In Progress

The following actions are available while a launch has a status of In Progress:

- During list preprocessing, the Stop Launch link can stop the step that is currently in progress, and the program is placed in Planning or Re-Planning status. You are asked to confirm your request to stop the launch. The specified email address receives a cancel confirmation email.
- If the execution job has not yet been delivered to the email execution vendor, editing the outbound section of the program cancels the scheduled email execution job. Then the program is placed in the Planning or Re-Planning status.

After the program launch has been scheduled, you can view the program history. For more information, see [Displaying Program History](#).

When the email execution job has been successfully scheduled, the program status changes to In Progress. When a program has reached In Progress status, a Deactivate button appears. Clicking the Deactivate button stops the program and stops all components. You cannot edit the program if you use the Deactivate button, but you can copy the program.

The following table illustrates the transitions available during a program launch:

Current Status	Possible Transitions
Planning	Launch In Progress
Launch In Progress	In Progress Planning (when Stop Launch is clicked) Re-planning (when Stop Launch is clicked)
In Progress	Re-planning Deactivated
Re-planning	Launch In Progress (On Apply Changes)

Allow plenty of time to test a program from start to finish. A test period of at least 24 hours to 48 hours is highly recommended. If issues arise during testing, then you have time to address them. Also, allow time between the program launch and email execution date. Also allow time for canceling a launch, if necessary.

### Postlaunch Reporting for Static Programs

Email execution statistics for programs that have outbound email configured might not be available immediately after a launch. If the program execution is scheduled in the future, its statistics are not available until after the program launch executes. Allow at least 4 hours from the time the launch is passed to the email execution vendor to the time that results are made available. This delay represents the time necessary for the email vendor to process the job and report results to Oracle CRM On Demand Marketing.

### Email Execution Report for Static Programs

When email execution statistics have been reported to Oracle CRM On Demand Marketing following program execution, results are available in the Email Execution Report. For more information, see [Displaying the Email Execution Report](#).

## Launching Automated Programs

When a program that is part of an automated (adaptive or workflow) campaign has been thoroughly tested, it is ready to launch. A program can be launched days or weeks before its first outbound email execution date.

Oracle CRM On Demand Marketing automation jobs run on predefined schedules. A predefined schedule makes sure that Oracle CRM On Demand Marketing frequently checks to see if additional contact records have been added to the database, which meet the eligibility criteria for all automated campaigns. It also checks to see if there are outbound email programs ready to be sent. This check is based on the automation rules and timing defined during campaign creation. Because Oracle CRM On Demand Marketing does this preprocessing regularly, it is ready to send automated programs at any time.

### About Email Quotas

The number of emails that your organization can send is limited. Your organization purchases a specific amount, called your email quota. Before each job is launched, Oracle CRM On Demand Marketing checks to make sure that the job will not exceed your email quota. Test emails do not count against your quota. You can use the Available Volume Report to see what your email quota is and how much of it is remaining. For more information, see [Available Usage Volume Report](#). When you approach your email quota, a warning message appears in the left panel letting you know if you are at 70%, 80%, 90% of your email quota or have exceeded your email quota.

Because automated programs launch successive programs without direct user involvement, the launch job might fail if it exceeds your email quota. If you see a warning in the left panel that you have exceeded your email quota, check the job status to see if any automated launches have failed.

### To launch an automated program

1. Click Launch Program from the Program Details screen.

A Launch Confirmation window appears requesting confirmation of the launch.

2. Confirm by clicking Launch Now or cancel the launch.

### Postlaunch Reporting for Automated Programs

Email execution statistics for programs that have outbound email configured might not be available immediately after a launch. If the program execution is scheduled in the future, its statistics are not available until after the program launch executes. Allow at least 4 hours from the time the launch is passed to the email execution vendor to the time that results are made available. This delay represents the time necessary for the email vendor to process the job and report results to Oracle CRM On Demand Marketing.

### Email Execution Report for Automated Programs

When email execution statistics have been reported to Oracle CRM On Demand Marketing following program execution, results are available in the Email Execution

Report. Similar information is also available by running the Email Statistics operational report.

**To display the Email Execution Report**

- From the Program Details screen click the linked words In Progress in the Outbound Email Invitations section of the Program.

## Displaying Program History

The complete program history is logged while a program is being created, edited, and launched. You can track all changes to a program throughout its life-cycle.

**To display program history**

1. Display the Program Details screen.
2. Click View History at the bottom right of the program header section.

## Displaying the Email Execution Report

An Email Execution Report is available shortly after a campaign or program has been executed. When you launch a program in Oracle CRM On Demand Marketing, it validates the program configuration, processes the lists, and schedules the program for delivery to the selected email distribution vendor. When the email execution vendor has processed the email delivery, overview email execution statistics are reported back to Oracle CRM On Demand Marketing. The report is generated usually within 1 to 2 hours after the email delivery occurs.

**To display an explanation of statuses**

- Click the green question mark button in the email execution report section headers.

The email delivery statuses are:

- **Scheduled.** The email delivery has been scheduled for the date you have specified.
- **In-Progress.** The email delivery job is processing.
- **Completed.** The email delivery job has finished processing and emails have been sent successfully.
- **Failed.** The email delivery job has finished processing, but the email delivery has failed.

Additional postlaunch statistics are available within 4 to 8 hours after the email delivery has been executed. This section of the Email Execution report provides more detail and the ability to display or download the contacts who fall into each particular response category, such as unique clicks and unique views. Contact data is not available for email launches older than 60 days.

The following procedure describes how to display the Email Execution Report.

**To display the Email Execution Report**

1. Navigate to the Program Details screen for the program that you are tracking.
2. In the Email Invitations section, click the In Progress link, then select one of the following:
  - Initial Invitation



- Repeat Invitation

## Displaying the Lead Funnel Report

After the campaign and program launch, you can check the Lead Funnel Report to display statistics on the invitations sent, how many were delivered, the clickthrough rate, and the number of registrations. The Lead Funnel Report also takes into account the result of inbound filters and lead scoring rules. It also shows how many registrations were disqualified by these rules. The Lead Funnel Report is available for individual programs from the campaign details screen and also from the Reports tab under operational reports in the Registration category.

### To display the Lead Funnel Report

- From the Campaign Details screen in the Programs List section, click the In Progress link for the program.

The Lead Funnel Report is displayed in a new window. The Lead Funnel Report statistics include: registrations submitted by your internal team. To filter these from the final qualified number, add an inbound filter that filters your own company domain. This report contains useful information on responses, including:

- Responses by company or domain
- Results of filtering
- The number of registrations from previously known contacts
- Repeat registrations for individual contacts
- The number of contacts scored according to your defined lead-scoring rules

## Searching for Programs

Oracle CRM On Demand Marketing provides the following ways to search for programs:

- By keyword
- By program type
- By date range
- By program status

### To search for a program by keyword

1. Select a folder and a view.
2. Enter a keyword or character string in the Program Name field, in the Program Code field, or in the Campaign Name field.
3. Search using multiple keywords separated by a comma (,).
4. Press Enter or click the Filter button.

The search results display only a list of programs whose name contains the keyword or character string.

### To search for a program by program type

1. Select a folder and a view.
2. Search by program type by entering the Program Type, then click the Filter button.

3. Select a program type by selecting the check box and clicking Select.

The search results display only a list of programs whose program type matches your criteria.

#### **To search for a program By date range**

1. Select a folder and a view.
2. Search by Start Date or Last Modified Date either by typing a date in the field or clicking the Calendar icon and choosing a date.
3. Search by Date Range or Recency - Within the Last xx days.
4. Click OK.
5. Click the Filter icon.

The search results display only a list of programs whose start date or last modified date matches the search criteria.

#### **To search for a program by program status**

1. Select a folder and a view.
2. Click the down arrow next to the Status list.
3. Select Planning, In Progress, Completed, Re-Planning, Canceled, or Program Launch In Progress.
4. Click the Filter icon.

The search results display only a list of the programs whose status matches your criteria.

## **Editing Programs**

You can edit programs before they are launched. You can edit some program components or sections after they are launched.

#### **To edit a program**

1. Navigate to the Programs main screen.
2. Select a folder and a view.
3. If necessary, use the search function to find a program.
4. Click Edit.
5. Complete your edits and save.
6. Test the program with the new components.
7. To relaunch the program, click Apply Changes.

You can also access a program that you want to edit from within the parent campaign.

#### **To access a program from within the parent campaign**

1. From the Campaign Details screen, find the list of programs within the campaign.
2. Click the Edit (pencil) icon to the right of the program name.
3. Complete your edits and save.
4. Test the program with the new components.

5. To relaunch the program, click Apply Changes.

After a program is launched, you can still edit the components, such as Edit Email Invitations to Add a Repeat Invitation, or you can configure a reminder email in the Registration section.

#### **To edit components**

1. From the Program Details screen, find the section of the program that you want to edit.
2. Click Add or Configure.
3. Complete your edits and save them.
4. Test the program with the new components.
5. To relaunch the program, click Apply Changes.

## **Deleting Programs**

You can delete programs that are in Planning status at any time. The Delete function is disabled for programs that have a status of In Progress. You cannot delete a program after it has been launched.

#### **To delete a program**

1. From the Programs home page find a program.
2. Select a folder and a view.
3. If necessary, use the search function to find a program.

Dynamic navigation buttons follow your pointer as you pause on the list of programs.

4. When positioned over a program, click Delete.
5. Confirm that you want to delete the program.

You can also delete a program from within the parent campaign

#### **To delete a program from within a campaign**

1. From the Campaign Details screen, go to Programs section.
2. Find the program that you want to delete.
3. Click the Delete button.

## **Copying Programs**

You can copy a program from the Programs Home screen or from the Campaign Details screen for the parent campaign.

#### **To copy a program**

1. Navigate to the Programs Home screen.  
This screen displays a list of the existing programs.
2. Select a folder and a view.
3. If necessary, use the search function to find a program.
4. Select the program that you want to copy, and click Copy.

The Program Header screen displays the newly copied program. Program names and codes must be unique. Oracle CRM On Demand Marketing adds *Copy of* in front of the previous program name and a string of numbers after the previous program name and after the previous program code.

5. Edit the program name and program code to rename the newly copied program.

The copied program contains all the elements of the original program including: Target List, Email Invitations, Web form, and call script.

6. Complete your edits for the new program header.
7. Verify the Configuration Options needed for the new program.
8. Click Save.

The Program Details screen appears.

9. Edit all the program components and save them.
10. Test the program.

For more information, see [Testing a Program](#).

11. Launch the program.

For more information, see [Launching Static Programs](#) or [Launching Automated Programs](#).

You can also access a program to copy from within the parent campaign.

#### **To access a program from within a campaign**

1. From the Campaign Details screen, find the list of programs within the campaign.
2. Click the Copy icon (two sheets of paper) to the right of the program name.
3. Edit all program components, and save them.
4. Test the program.

For more information, see [Testing a Program](#).

5. Launch the program.

For more information, see [Launching Static Programs](#) or [Launching Automated Programs](#).

## **Moving Programs**

You can move a program from one campaign to a different campaign.

#### **To move a program**

1. From the Programs Home screen, find the program that you want to move.
2. Click Edit.

The Program Header screen appears.

3. Click the Lookup icon (magnifying glass) next to the campaign name.

A Campaign Lookup window appears.

4. Select the option for the campaign name that you want to move the program to, and then click Select.

The program moves to the selected campaign.

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## Managing Web Sites

This chapter covers managing and working with Web sites. It includes the following topics:

- [Working with Web Sites](#)
- [About Web Forms](#)
- [About Microsites](#)
- [About Topics](#)
- [Working with Recommendation Rules](#)

### Working with Web Sites

This topic contains the following information:

- [About Web Forms](#)
- [About Web form Rules](#)
- [Web Form Status](#)
- [Creating Web Forms](#)
- [Creating Web Form Headers](#)
- [Selecting Web Form Attributes](#)
- [Defining the Question and Attributes for a Web Form](#)
- [Defining Web Form Options](#)
- [Configuring Web Form Completion Activities](#)
- [Editing Web Forms](#)
- [Deleting Web Forms](#)
- [Copying Web Forms](#)
- [Searching for Web Forms](#)
- [Moving Web Forms](#)
- [Displaying Web Form Properties](#)
- [About Microsites](#)
- [Microsite Fields](#)
- [Creating Microsites](#)

- [Microsite Statuses](#)
- [Searching for Microsites](#)
- [Editing Microsites](#)
- [Deleting Microsites](#)
- [Displaying the Microsite Approval Workflow](#)
- [About Topics](#)
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- [Searching for Recommendation Rules](#)

## About Web Forms

A *Web form* is a survey or registration form used for collecting information from marketing campaign participants or *contacts*. The contact completes the Web form after clicking an email invitation or online banner advertisement. You target contacts for marketing campaigns by using a program defined in Oracle CRM On Demand Marketing, which requires the contact to enter user information. The contact accesses the Web form by clicking the embedded link that directs the contact to the Program Pretty URL.

Oracle CRM On Demand Marketing interacts with the contact through questions and captures the contact's responses, which are retained in the contact record in the contact database. Web forms can be simple. For example, a Web form can be a registration form for an event where only the following demographic contact information is required:

- First name
- Last name
- Email address
- Company name

Web forms can also be complex. For example, it can be designed with rules to prepopulate or skip questions if the contact has previously answered a question.

You can define the rules in Oracle CRM On Demand Marketing to present the contact with certain supplementary questions based on the contact's response to an initial question. For example, if a contact enters higher education in the Industry field, Oracle CRM On Demand Marketing can prompt the contact for extra information about the

higher-education industry sector only, for example, a job title, such as Dean, Professor, Instructor, Student, and so on.

When profile information is captured and added to a contact record, Oracle CRM On Demand Marketing displays more questions or validation messages depending on the information that the contact provided previously.

Web forms can present single or multiple interaction stages. For example, if a single or master Web form is used for all microsite or document downloads, you can set the following Web form interaction stages:

- [Web form Interaction #1](#)
- [Web form Interaction #2](#)
- [Web form Interaction #3](#)

### **Web form Interaction #1**

In this Web form interaction, only the following basic contact information is collected:

- First name
- Last name
- Email address
- Company name
- ZIP code

### **Web form Interaction #2**

In this Web form interaction, additional profile information is collected, and the basic contact information captured in interaction #1 is either skipped or prepopulated.

- First name is prepopulated.
- Last name is prepopulated.
- Email address is skipped if the contact provided an email address within the last XX days.
- Company name is skipped.
- ZIP code is skipped.

Oracle CRM On Demand Marketing prompts the contact for the following information:

- Industry
- Job title
- Purpose of Visit. You can choose from the following: Keeping up with Industry Trends, Evaluating Vendors, Researching Specific Solutions, and so on.

### **Web form Interaction #3**

In this Web form interaction, you can capture additional qualification and interest information to determine the following:

- If the contact is ready to speak with a sales representative
- If the contact can be targeted for a nurture campaign that is based on her interests

## About Web form Rules

Web form rules affect the behavior of the Web form at run time. The rules can be based on the following categories:

- **Profile.** The information saved in a contact's profile gathered from previous interactions.
- **Question.** The responses to the questions gathered from the current interaction, or, the Web form that the user is responding to.

### Using the Advanced Skip Feature

Use the Advanced Skip feature to skip a question based on other questions in the same Web form or the user's profile.

#### To use the Advanced Skip feature

1. Open the Web form that you want to edit.
2. Click Question Options, and click Edit Rules for the question that you want to edit.
3. Scroll down to the Advanced Skip section, and click New Rule.

The Condition Builder screen allows the definition of complex rules based on three components: a LHS (Left Hand Side) Value, an Operator, and a RHS (Right Hand Side) value.

4. Select either a question on the Web form or a contact's profile attribute (LHS), and compare it to a value (RHS) using the specified operator.

For example, if you have the following condition, then the LHS value is *Question: Country*, the Operator value is *Equal To*, and the RHS value is *USA*.

Question: Country Equal To USA

### Building Conditions

The following procedure explains how to build a condition when making rules in Oracle CRM On Demand Marketing.

#### To build a condition

1. Select one of the following types for the LHS value:
  - **Question.** This value displays the list of questions in the Web form that appear before the current question. Oracle CRM On Demand Marketing enables you to select any question that has been asked before the current question.
  - **Profile.** This value displays the list of profiles, such as Demographic, Insight, Oracle CRM On Demand Contact, and Oracle CRM On Demand Lead in a list with the profile's corresponding attributes in a list to the right. Pick an operator for the condition. The RHS is either a list of Answer Option values for the question or the different values for a profile attribute. It is possible to define multiple conditions and join them using the operators: AND or OR, for example:

Country Equal To USA AND Job Title Equal To CEO

2. Select when the question should be skipped.
3. Select either a question on the Web form or a contact's profile attribute (LHS), and compare it to a value (RHS) using the specified operator.



For example, if you have the following condition, then the LHS value is *Question: Country*, the Operator value is *Equal To*, and the RHS value is *USA*:

Question: Country Equal To USA

## Creating Conditional Questions

*Aliasing* is a method of creating questions whose acceptable answers can vary depending upon other conditions. For example, if the specified country is USA, the State field must list the states in the USA, whereas if the country is India, then the user must be allowed to enter the state value manually.

### To create a conditional question

1. Define multiple question variations to use for the same attribute.

You must edit each attribute that requires aliasing and create new questions for it.

2. Open the Web form that you want to edit.
3. Click Question Options.
4. Click Edit Rules for the question that you want to edit.
5. In the Aliasing section, click New Rule.

This step enables you to define a condition and select a question alias to display when the condition is true.

6. Select either a question on the Web form or a contact's profile attribute (LHS), and compare it to a value (RHS) using the specified operator.

For example, if you have the following condition, then the LHS value is *Question: Country*, the Operator value is *Equal To*, and the RHS value is *USA*:

Question: Country Equal To USA

## Web Form Status

Oracle CRM On Demand Marketing creates a newly defined offer with a New offer status. Offers first must have an Accepted status and then an Approved status before it is available for use by programs.

The following table provides an overview of Web form statuses.

Status	Description
New	Indicates the default status for all new Web forms.
Deployed	When the initial setup of a Web form has been completed, the offer must have an Activated status, followed by a Deployed status. Only Web forms with a Deployed status can be associated with programs. Web forms with a Deployed status can be edited.
Hold	A Web form that has been activated can be deactivated, which changes the Web form status to Hold. If a Web form has a Hold status, then it cannot be associated with programs. Activating the Web form changes the status to Deployed status, then it can be used again.

## Process of Creating a Web Form

You can create a Web form by using the following procedures with the Webform Wizard.

**To create a Web form manually, perform the following tasks:**

1. [Creating Web Forms](#)
2. [Creating Web Form Headers](#)
3. [Selecting Web Form Attributes](#)
4. [Defining the Question and Attributes for a Web Form](#)
5. [Configuring Web Form Completion Activities](#)

When you have created your Web form, you can also perform the following tasks:

- [Editing Web Forms](#)
- [Deleting Web Forms](#)
- [Copying Web Forms](#)
- [Searching for Web Forms](#)
- [Moving Web Forms](#)
- [Displaying Web Form Properties](#)

## Creating Web Forms

This task is a step in [Process of Creating a Web Form](#).

**To create a Web form**

- Do one of the following:
  - From the Quick Access Menu on the left, choose Create Webform from the Quick Actions menu.
  - From the Website tab, select Webforms, and then click New Webform.

## Creating Web Form Headers

This task is a step in [Process of Creating a Web Form](#).

For the Web form name, Browser title, and content to display correctly with a branding template, you must insert several tags into your branding template code. Oracle CRM On Demand Marketing supports specific tags for branding templates in addition to the `$$MBOS_CONTENT$$` tag, which instructs a template to insert the Web form at the tag position. There are three new tags:

- **M2L\_HEAD.** `$$M2L_HEAD$$` goes inside the `<head>` tag. The .js and .css files are also located in this tag.
- **M2L\_TITLE.** `$$M2L_TITLE$$` is the browser title and goes inside the `<title>` tag.
- **M2L\_BODY.** `$$M2L_BODY$$` is the new tag to call Web form content.

**To create Web form headers**

1. In the Name field, enter a unique name for the new Web form.
2. In the Description field, enter a corresponding description.
3. In the Browser Title field, enter the window browser title.
4. In the Max No. of Questions field, enter how many Web form questions you require in a single interaction.
5. Select the Embed Email Challenge check box, or else leave it blank.

If the contact is a returning visitor who has registered before, embedding the email challenge allows the contact to enter only an email address. Oracle CRM On Demand Marketing recognizes the contact and populates all the fields that the contact has previously answered on the Web form. The contact is able to update any of the populated information if needed. This feature eliminates redundant questions, reduces Web form abandonment, and improves the user experience. Embedding the email challenge works only when branding is configured. For more information on branding, see [Configuring the Branding and Preregistration](#).

6. Click Next.

## Selecting Web Form Attributes

This task is a step in [Process of Creating a Web Form](#).

Web form fields are *attributes* or questions that you can use in your Web form. The Webform Fields screen displays a list of the existing contact questions. You can use the questions in your Web form, or you can search for and add as many questions as you want.

### To add an attribute to a Web form

1. Search for an attribute by doing one or all of the following:
  - From the list of attributes on the Webform Fields screen, pause the pointer on the attribute that you want to use, and click Add to Form. The Add to Form option appears only if the attribute has a question associated with it.
  - In the Attribute Name field, enter a keyword or character, and press Return.
  - Click the Attribute Category menu to search for attributes by category, for example, Demographic or Insight.

The selected attributes appear in the Selected for this Webform list.

2. Click Save.

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**Note:** There are two attributes that are similar: Province and State/Province. You can use one or the other but not both, as they map to the same field in the database. Using both attributes overwrites one with the other's data.

---

## Deleting Attributes

To delete attributes from a Web form, complete the following procedure.

### To delete a selected attribute from a Web form

- Pause the pointer on the attribute name in the Selected column for this Webform list, and then click Remove.

## Creating Attributes for Web forms

If the existing attributes do not meet your needs, you can create new attributes.

### To create an attribute for a Web form

- Click New Attribute.

For more information on creating a new attribute, see [Creating Attributes](#).

You can add attributes only with the associated questions to the Web form.

## Defining the Question and Attributes for a Web Form

This task is a step in [Process of Creating a Web Form](#).

This procedure enables you to define the behavior, display properties, and rules related to questions and attributes on a Web form. The Question Options screen displays the list of attributes you added to the Web form. This procedure also describes how to reorder the sequence in which the questions are asked on the Web form.

### To define the question options

1. To move one question at a time, click the up and down arrows to the left of each question.
2. To add more questions or attributes to the Web form, click Add Attributes.  
This operation returns you to the list of the available attributes. For more information, see [Selecting Web Form Attributes](#).
3. (Optional) To reposition multiple questions or attributes, or to move a question more than one position up or down, use the following procedure:
  - a. Click the Multi-Sequence button above the list of questions.
  - b. Click the name of an attribute to reposition it, and click the up or down arrow to move it up or down in the list.
  - c. When the order is correct, click Apply.
4. (Optional) To change or select the question or answer set for the attribute on the Web form, do the following:
  - a. Click Change Question Set.  
The List of Questions screen appears.
  - b. From the lists displayed, click Select.  
For example, for the State/Province attribute there might be one question set defined for states in the U.S.A. with the appropriate answer values and another question set defined for Canadian Provinces with the appropriate answer values.
5. (Optional) To change how the question looks on your Web form, do the following:
  - a. Click Edit Display Properties.  
The Edit Display Properties screen appears.
  - b. From the Answer Style menu, select the required format for the Web form answer.  
When you select a format, a preview window appears below the menu.
  - c. In the Drop Down Size field, enter the number of answer options that are visible in the menu.
  - d. From the Question Style menu, select the required format for the Web form question.  
When you select a format, a preview window appears below the menu.
  - e. In the Question and Answer in same line field, select Yes or No.
  - f. In the Follow Previous Question field, select Yes or No.

- g. To prepopulate the field with a default answer in the Request Parameter field, enter the default answer.  
The value of this variable (if present) overrides the default answers specified in the Default Answer field.
  - h. Select the Page Break check box to create a page break under this question.  
If this check box is selected, the user must click Continue, instead of Submit, to move to the next page of the Web form.
  - i. Select the Hide Question check box to hide the question and to allow you to set the default answer.
6. (Optional) To change how the rules work with your Web form, modify the rules, as needed.  
For more information, see [About Modifying Rules](#).
7. (Optional) To edit a caption, do the following:
- a. Click Edit Caption.
  - b. In the Caption field, enter a caption for the Web form question.
  - c. From the Caption Location menu, select where the caption is located.
  - d. From the Caption Style menu, select the required format for the caption.  
When you select a format, a preview appears below the menu.
  - e. Select the Show as Tool Tip check box if you want the caption to appear as a tooltip.  
If you select this option, the Caption Style menu is disabled.
  - f. Click Add Caption.  
The saved caption is listed in the Caption Details section. You can modify the saved caption by clicking the Edit icon (pencil), or delete the saved caption by clicking the Delete button.
8. (Optional) To remove a question from your Web form, click Remove.  
This operation only removes the question from the current Web form. It does not delete the question from Oracle CRM On Demand Marketing.
9. (Optional) To make a question on the Web form mandatory, click the Mandatory check.  
The Web form cannot be submitted without a value in the Mandatory field.
10. (Optional) To prepopulate a question if already answered, select the Prepopulate if Answered check box.  
This option causes a question to be prepopulated with the value from the user's profile. To prepopulate a question only if it was answered within a given amount of time, select the check box for Prepopulate if answered, and provide the time value in either days or months. The questions that are typically prepopulated are demographic attributes, such as contact name, company and address information.
11. (Optional) To skip a question because a user has already answered it in a previous interaction or Web form, select the Skip Question if Answered check box.  
If you select this option, you must provide the time value in either days or months. For certain attributes, a time refresh policy is recommended, for example, a contact's job title might change every 6 months.

## 12. Click Save.

### About Modifying Rules

You can modify the following rules:

- **Prepopulate Question.** This rule prepopulates a question with the value from the user's profile. To prepopulate a question only if the question was answered within a specific period, select the Prepopulate if Answered check box. You must also provide the time value in either days or months. Most prepopulated questions are typically demographic attributes, such as contact name, company, and address information.
- **Skip Question.** You can skip a question if a user has already answered it in a previous interaction or Web form. To skip a question, select the Skip if Answered check box. You must also provide the time value in either days or months. For certain attributes, you can implement a time refresh policy, for example, a contact's job title might change every 6 months.
- **Advanced Skip.** You can use the Advanced Skip section to skip a question that is based on other questions in the same Web form or the user's profile. For more information, see [Using the Advanced Skip Feature](#).
- **Building a Condition.** For more information on building a condition, see [Building Conditions](#).
- **Jumping and Branching.** Jumping and branching enables Oracle CRM On Demand Marketing to branch to a question based on a condition. Branching is useful when the Web form has many questions. When you branch a condition on a question, it causes a page break in the Web form. To define the condition, see [Building Conditions](#).
- **Validations.** Validation rules allow you to define interdependent field validations. For example, you can capture the country and state for a prospect and make completion of the state field mandatory only if the prospect selects USA as the country. For example, you can define a condition that displays an error message if the Country field value is equal to USA and the State field value is blank or left unanswered. To define a condition, see [Building Conditions](#).
- **Aliasing.** The aliasing feature enables you to define a different phrasing for a question, or, to allow a different question to capture the same piece of information through your Web form. For example, you might capture information on a prospect's country and state. For the USA, use the question, *Please Select Your State*, and for Canada you can use the question, *Please Select Your Province*. For more information, see [Creating Conditional Questions](#).
- **External Validations.** Validation rules define interdependent field validations. For example, you can capture the country and state for a prospect and make completion of the state field mandatory only if the prospect selects USA as the country. In this case, you can define a condition that if the Country field value is equal to USA and the State field value is blank or left unanswered, then the condition displays an error message. To define a condition, see [Building Conditions](#).

## Defining Web Form Options

This task is a step in [Process of Creating a Web Form](#).

The Webform Options screen displays a dynamic preview of the Web form. You use this screen to verify that the Web form questions or attributes are displaying and functioning properly according to the defined rules.

### To define the Web form options

1. Click WebForm Display Properties to alter the current format of the Web form.  
For more information, [Defining the Question and Attributes for a Web Form](#)
2. Click Default Branding, and do the following:
  - a. From the Branding Template menu, select a branding template.  
This step associates a branding template with the Web form. The branding you select at the program level overrides the Web form-based default branding.  
For more information, see [Configuring the Branding and Preregistration](#).
  - b. Click Preview to display a preview of the selected branding template.
3. Click Change Theme, and do the following:
  - a. Select one of the themes displayed in the Choose Theme screen.
  - b. Click Apply.
4. Click Rule Summary to display the current rules in operation on the Web form, then click Save.

## Configuring Web Form Completion Activities

The final activity when completing a Web form is creating an optional confirmation or Thank You email to be sent to the contact when the contact submits the Web form. You can also create a notification email to associate with a Web form to notify the campaign owner and other members of the marketing or sales teams that the contact has submitted the Web form. Any Thank You email or notification emails created at the Web form level supersede those emails created at program level.

You can set up a Thank You email associated with a Web form if the Web form is used widely, for example, when it is used in an online resource-center to offer downloads. In this case, the content in the Thank You email must be general. If you create Thank You and notification emails as part of a program, it enables you to apply program branding to the emails, and it also enables you to create specific email content.

### To configure a Thank You email to associate with the Web form

1. From the Web form edit screen, click Completion Activities.
2. Select the Thank You Email check box.
3. In the From Address field, enter the email address from which the Thank You email originates.
4. In the Subject field, enter the subject of your email.
5. In the HTML Email window, enter the content for your Thank You email.
6. Copy and paste the content from the HTML Email window to the Text Email window.

### To configure a notification email associated with the Web form

1. Click Completion Activities.
2. Select the Notification Email check box.

3. In the From Address field, enter the email address from which the notification email originates.
4. In the Subject field, enter the subject of your email.

The body of the notification email contains information from the contact's profile along with the information the contact submitted on the Web form.

## Editing Web Forms

This task is a step in [Process of Creating a Web Form](#).

You can edit a Web form at any time, even if the Web form is active.

### To edit a Web form

1. Click the Websites tab, and click Webforms.
2. Find the Web form that you want to edit.
3. Pause the pointer on the Web form that you want to edit, and click Edit.

The Webform Header page appears. For more information, see [Creating Web Form Headers](#).

## Deleting Web Forms

This task is a step in [Process of Creating a Web Form](#).

You can delete a Web form if it has not been associated with a program that has a status of In Progress.

### To delete a Web form

1. Click the Websites tab, and click Webforms.
2. Find the Web form that you want to delete.
3. Pause the pointer on the Web form, and click Delete.
4. Click OK to confirm that you want to delete the Web form.

## Copying Web Forms

This task is a step in [Process of Creating a Web Form](#).

You can copy a Web form if it has not been associated with a program that has a status of In Progress.

### To copy a Web form

1. Click the Websites tab, and click Webforms.
2. Find the Web form that you want to copy.
3. Pause the pointer on the Web form, and click Copy.
4. Rename the copied Web form with a new, unique name, then click Save.

## Searching for Web Forms

This task is a step in [Process of Creating a Web Form](#).



You can search for Web forms, using the description, status, and last modified date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

**To search for a Web form**

1. Click the Websites tab, and click Webforms.
2. Select a folder or view to narrow your search.
3. On the Main Webforms screen, enter a keyword or character string in the Webform Name field.
4. Click Filter or press Enter.

## Moving Web Forms

This task is a step in [Process of Creating a Web Form](#).

You can use folders to move and organize Web forms.

**To move a Web form to a folder**

1. Click the Websites tab, and click Webforms.
2. Find the Web form that you want to copy.
3. Select the Webform Name check box, and click Move to Folder.  
A window displays the existing folder structure for the existing Web forms.
4. Click the folder where you want to move the Web form, then click Move.

## Displaying Web Form Properties

This task is a step in [Process of Creating a Web Form](#).

This procedure describes how to display specific information on a Web form, such as with which programs the Web form is associated and the last modifications performed on the Web form.

**To display Web form properties**

1. Click the Websites tab, and click Webforms.
2. Find the Web form that you want to display.
3. Click the Web form name.  
In the Webform Header section, the Last Modified section provides information on the last user who modified the Web form.
4. In the Webform Header section, click Programs Using this Webform.  
A window displays a list of programs with which the Web form is associated.

## About Microsites

A *microsite* is a separately promoted part of a larger Web site, which is designed to meet separate objectives and has a separate Web address (URL) as its home page. A microsite provides information about a topic or solution and can offer downloadable white papers, videos, news and trends related to the homepage. Microsites are often temporary Web sites, for example, for a product launch or event promotion, which can be available for only a short time and can be removed from Web servers when the

promotion is finished or the information is no longer relevant. For example, a computer manufacturer has a microsite to inform customers and prospects about a new product. You can create multiple microsites to offer existing offers for download and require registration to continue to build your contact database or continue to maintain profiles of the existing contacts. You can promote your microsites and direct traffic to your microsites in outbound email campaigns. You can also send email announcements when new offers are available. Each microsite is accessed by its own Pretty URL.

### Scenario for Using a Microsite

This topic gives one example of how a microsite might be used. You might use microsites differently, depending on your business model.

A museum's Web site has a link to a microsite, which contains information about a special exhibition. The microsite has multiples levels of content with specific topic pages and related subtopic pages. The museum Web site promotes and links to a microsite that promotes a Japanese art exhibition. The microsite provides information on the Japanese art exhibition and the Edo Period. It also links to the following topics:

- Japanese textiles
- Japanese woodblock prints
- Japanese ceramics
- Japanese sculpture and carvings

Each topic can contain subtopics. For example, under Japanese woodblock prints topic, subtopics describe artists or subject matter, such as the following:

- Hiroshige
- Hokusai
- Landscapes
- Geisha

## Microsite Fields

The following table describes required information when creating a microsite.

Microsite Field Name	Microsite Field Description
Name	Unique name for the microsite.
Description	Describes the purpose, target audience and the global or local initiative to which the microsite is tied. This description is not shown to external customers.
Pretty URL	The directory where the microsite page is created. The outbound communication sent to the contacts to direct traffic to the microsite uses this URL.
Start Date	Date when the microsite is available to the contacts.
End Date	Date when the microsite is no longer available to the contacts.
Dark Date URL	The URL displayed to the contacts when the microsite is deactivated.
Branding	Branding template specific to the microsite or general branding template.
Overwrite Topic Branding	Determines if topics appear with the microsite branding rather than with individual-topic branding.

Microsite Field Name	Microsite Field Description
Time-Based Registration Rule	Allows prospects to register for multiple offers within a microsite while requiring them to completing the registration form only once for the first offer. When the prospect selects subsequent offers within the specified number of days, the registration form is skipped.

## Creating Microsites

This procedure describes how to create a microsite.

### To create a microsite

- Do one of the following:
  - From the Quick Access Menu on the left, select Create Microsite from the Quick Actions menu.
  - From the Website tab, select Microsites, and then click New Microsite.
- Complete the fields in the Microsite Information and Time-Based Registration Rules panes.

If you must comply with the European E-Privacy Directive and your company is using selective enablement of cookie consent, and if the microsite you are creating is one where you want to enable cookie consent, then select the Enable Cookie Consent check box.

The Site Page pane appears. This pane enables you to define site page information, such as overall layout of the page and necessary tagging constructs, including: prospect personalization tags, topic listing tags, offer listing tags, and recommendation tags. For more information, see [Microsite Fields](#).

- Click Next.
- On the Site Page pane, select one of the following:
  - Import HTML File.** For more information, see [Using HTML Files](#).
  - Select a Template.** For more information, see [Selecting Templates](#).
  - Insert tags.** For more information, see [Inserting Tags](#).

The Microsite Topics pane appears. Oracle CRM On Demand Marketing merges the list of topics and displays them on the main page in place of the topic tags. It provides the flexibility of selecting from a list of meta tags for each topic. One topic can be reused and associated with multiple microsites.

- Click Next.
- On the Microsite Topics pane, do the following:
  - Click the topic name to display the topic details.  
The topic appears on the right.
  - Click View Topic Page or View Topic Details.
  - Click Associate Topic.
  - Select and associate additional topics, if necessary.

You can select only from approved topics that are available. You can add required topics by clicking Associate Topics.

The Approval Workflow pane appears. In this pane, you submit the microsite for approval. Any change to the microsite must go through the proper approval workflow before the microsite can be published to the public Web site.

7. Click Next.

On the Approval Workflow pane, the series of stages are Submit, Approve, or Deny.

### Using HTML Files

Verify that the HTML files you upload have absolute references to images, JavaScript files, style sheets, and so on. When an HTML file is associated with a microsite, Oracle CRM On Demand Marketing makes a local copy of the file. Also ensure that the only changes you make using the HTML editor are specific to the microsite. Any change required for multiple microsites must be made to the template.

#### To use HTML files

1. Click Import HTML File.
2. Click Browse to find an HTML file, and then click Upload.

### Selecting Templates

This procedure describes how to select templates on the Site Page pane.

#### To select a template

1. Click Select a Template.
2. Select a template from the list of predefined templates that have been uploaded.
3. Click Select to apply the template to the microsite.

### Inserting Tags

This procedure describes how to insert tags on the Site Page pane.

#### To insert tags

1. Click Insert Tags.
2. From the left menu, select a tag category.  
A list of tags for that category appears in the right menu.
3. From the right menu, select a tag.  
Oracle CRM On Demand Marketing generates a scriptlet, which appears in the Editor window under the Insert Tags tab.
4. Copy and paste the scriptlet into the Editor window.
5. Repeat this procedure as often as necessary.
6. Click Next.

## Microsite Statuses

The following table provides information on the different microsite statuses.

Status	Description
New	Default stage while the microsite is being created. In this stage, the microsite is considered to be in Draft mode.
Pending Approval	The marketing user responsible for the microsite has completed the microsite definition or completed revisions and has submitted the microsite for approval.
Approved	The appropriate manager responsible for the microsite has approved the microsite.
Rejected	If an approver rejects a newly created microsite, the Rejected status is assigned to the microsite.

## Searching for Microsites

This procedure describes how to find a microsite.

### To search for a microsite

1. Click the Websites tab, and click Microsites.
2. On the Main Microsites screen, enter a keyword or character string in the Microsite Name field.
3. Click Filter or press Enter.

You can search for a microsite, using the description, status, and last modified date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

## Editing Microsites

You can edit a microsite at any time as well as approved microsites. Editing an approved microsite resets the microsite status to New. The existing deployed microsite remains active. A copy of the live microsite is available for editing. When the revised microsite has been approved and deployed it replaces the previous version.

### To edit a microsite

1. Click the Websites tab, and click Microsite.
2. Find the microsite that you want to edit.  
  
To narrow your search, use the description, status, and last modified date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.
3. Pause the pointer on the microsite that you want to edit, and click Edit.  
  
This opens the Microsite Definition page. For more information, see [Creating Microsites](#).
4. After editing, submit the microsite.

When is submitted, the microsite must be approved and deployed. For more information on microsite statuses, see [Microsite Statuses](#).

## Deleting Microsites

You can delete a microsite if it has not been deployed. When a microsite had been approved and deployed the Delete button is disabled.

**To delete a microsite**

1. Click the Websites tab, and click Microsites.
2. Find the microsite.

To narrow your search, use the name, status, and date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

3. Pause the pointer on the microsite, and click Delete.
4. Click OK to confirm that you want to delete the microsite.

**Displaying the Microsite Approval Workflow**

All microsites must be approved by someone other than the creator. A microsite is available for deployment on or after the start date of the microsite and only after it has been approved.

**To display the approval workflow**

1. Find the microsite that you want to approve.

The Microsite Header screen opens.

2. Click Approval WorkFlow.
3. Follow your company's submit, approve, and deploy procedures.

**About Topics**

Topics are subject areas that can be of interest to the contacts who visit a microsite. A microsite can have one or more associated topics. Topics provide more detailed information on various areas of the subject related to a microsite.

**Scenario for Using a Topic**

This scenario gives one example of how topics might be used. You might use topics differently, depending on your business model.

A company creates a microsite for large enterprise business. The microsite has topics on different solutions for large enterprises. Each topic can have subtopics. Both a microsite and a topic can be multilayered with different information designed for different levels of decision makers within an industry. The microsite is promoting enterprise business solutions. The following topics are included in the microsite:

- Finance
- Operations
- Customer relationship management

Subtopics belonging to the example topics listed previously provide more specific details and information, for example, high-performance servers. A subtopic about server products might include the latest trends in server-computing technology.

Each topic might have multiple associated marketing programs that can be used to upsell or cross-sell other products offered by the company. For example, the topic detailing Enterprise Server products might offer a program on storage technology in the event that an enterprise customer might be evaluating storage solutions as well as server solutions.

## Topic Fields in a Microsite

The following table provides information on the required information when creating a new topic.

Name	Field Description
Name	Unique name for the topic.
Description	Brief description of the topic explaining the content of the topic. This description is shown to external customers.
Pretty URL	Directory where the topic page is created. The outbound communication sent to contacts to direct traffic to the microsite also uses this URL.
Start Date	The date when, after approval, contacts can display the topic.
End Date	Date when the topic is no longer available to Web site visitors.
Dark Date URL	Date when the topic is no longer available to Web site visitors.
Branding URL	The branding template used for the specific topic.
Time-Based Registration Rules	The time-based registration rule allows prospects to register for multiple offers within a microsite while only completing a registration form once. The prospect would complete the registration form for the first offer. Then when the prospect selects subsequent offers within the specified number of days, the registration form is skipped.
Image URL	Links to a relevant image that can be used with the topic.
Enable Cookie Consent	If you must comply with the European E-Privacy Directive and your company is using selective enablement of cookie consent, and if the topic is one where you want to enable cookie consent, then select the Enable Cookie Consent check box.

## Creating Topics

This procedure describes how to create a topic.

### To create a topic

- Do one of the following:
  - From the Quick Access Menu on the left, choose Create Topic from the Quick Actions menu.
  - From the Websites tab, click Topics, and then click New Topic.
- Complete the fields in the Topic Definition pane.  
For more information, see [Topic Fields in a Microsite](#).
- Click Next.
- On the Topic Page pane, define your topic by performing one of the following:
  - Import HTML File.** For more information, see [Using HTML Files](#).
  - Select a Template.** For more information, see [Selecting Templates](#).
  - Insert tags.** For more information, see [Inserting Tags](#).
- Click Next.

The Topic Programs pane is displayed where you assign programs to the topic. From the perspective of the resource center, a program and offer are analogous

because one program can have only one offer. Oracle CRM On Demand Marketing provides descriptive information from the program definition or from the offer definition.

6. On the Topic Programs pane, do the following:
  - a. To associate a program, click Associate Program.
  - b. Select the check box for the required program.
  - c. Click Associate to Topic.
  - d. Click Back when you have made all modifications.

The Approval Workflow pane opens. The topic must be approved. The approver must be someone other than the creator so that the topic content is thoroughly reviewed. An approval process is important for any content available on the company Web site. When a topic is approved and the microsite to which the topic is associated is approved and deployed, it is live for contacts visiting the microsite.

On the Approval Workflow pane, the series of stages are Submit, Approve, or Deny. For more information, see [Displaying the Microsite Approval Workflow](#). One topic can have multiple subtopics. All subtopics are shown as folders within the main topic folder.

## Topic Status

The following table provides information on the topic statuses in Oracle CRM On Demand Marketing.

Status	Description
New	The topic is in the draft stage and is considered a work in progress.
Pending Approval	The marketing user responsible for the topic has completed the topic or completed revisions and has submitted the topic for approval. In this stage, the topic cannot be edited.
Approved/Rejected	The topic has been approved or rejected.
Deployed	When a topic is approved it can then be deployed. In this status, the topic is available on the public Web site.

## Searching for Topics

This procedure describes how to find a topic in Oracle CRM On Demand Marketing.

### To search for a topic

1. Click the Websites tab, and click Topics.
2. On the Main Topics screen, enter a keyword or character string in the Topic Name field.
3. Click Filter or press Enter.

To search for a topic, use the status and published date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.



## Editing Topics

You can edit a topic at any time. However, a topic must be approved after it is revised. When the topic is approved it is then deployed.

### To edit a topic

1. Click the Websites tab, and click Topics.
2. Find the topic that you want to edit.

To narrow your search, use the topic name, status, and date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

3. Pause the pointer on the topic that you want to edit, and click Edit.

This opens the Topic Definition page. For more information, see [Creating Topics](#).

4. After editing the topic, click Save.

## Deleting Topics

You can delete a topic only if it has a New status. You cannot delete approved and deployed topics because the Delete button is disabled.

### To delete a topic

1. Click the Websites tab, and click Topics.
2. Find the topic that you want to delete.

To narrow your search, use the topic name, status, and date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

3. Pause the pointer on the topic, and click Delete.
4. Click OK to confirm that you want to delete the topic.

## Displaying the Topic Approval Workflow

All topics must be approved by a manager or someone in the organization other than the creator of the topic to ensure that the information is thoroughly reviewed. The approval workflow must be integrated with the company business process for Web content. A topic is available for deployment on or after the start date and only after it is approved.

### To display the approval workflow

1. Find the topic that you want to approve.

The Topic Definition pane opens.

2. Do one of the following:

- To approve the topic, click Approval WorkFlow.

The approved topic is available for deployment on or after the start date.

- To reject the topic, click Reject.

On the Approval Workflow pane, the series of stages are: Submit, Approve, or Deny. For more information, see [Displaying the Microsite Approval Workflow](#).

## Working with Recommendation Rules

Recommendation rules trigger recommendations and offers to contacts when they visit a microsite. You can embed recommendation rules in a microsite or topic page. You can use recommendation rules to provide new content and offers to a particular visitor each time the contact visits. The following are examples of how recommendation rules can be used:

- You can recommend an offer based on the topic area that the prospect has expressed interest in previously.
- You can recommend an offer based on the subject matter of offers that the prospect has previously downloaded.
- You can recommend an offer based on the type of offers that the prospect has downloaded previously.
- You can recommend offers in the sequence of perceived value.
- You can recommend offers based on the prospect's previous Web site activity.

## Creating Recommendation Rules

The following procedure describes how to create recommendation rules.

### To create a recommendation rule

1. Click the Websites tab, and click Recommendation Rules.  
The Recommendation Rule main screen opens.
2. Click New Recommendation Rule.  
The Recommendation Rule Definition screen opens.
3. Enter the following information for the new recommendation rule:
  - **Name.** The name of recommendation rule.
  - **Code.** A code for the recommendation rule.
  - **Description.** A description for the recommendation rule. The user does not see this description.
  - **Maximum Offers to Recommend.** The maximum number of offers that can be recommended when the recommendation rule is triggered.
  - **Arbitration Rule.** The rule used to specify which offer Oracle CRM On Demand Marketing recommends to the user. Only offers associated with programs that have the Eligible for Resource Center flag enabled are available for recommendation. Offers can be presented with the following arbitration rules options:
    - **Most Benefit.** Oracle CRM On Demand Marketing recommends the offer associated with the program with the highest business value.
    - **Profile Based Most Benefit.** When the Web site visitor is a known contact, Oracle CRM On Demand Marketing compares the known contact's profile with the program production list conditions and finds a matching Program with the highest business value. Oracle CRM On Demand Marketing recommends the offer associated with that program.
    - **Random.** Oracle CRM On Demand Marketing identifies any random program and recommends its associated offer.

The next section requires you to set a scope for the recommendation rule. This section limits the programs to be considered for offer recommendations.

4. To limit the programs to be considered for offer recommendation, set the scope based on:
  - Program Types
  - Microsites
  - Topic Areas

**Tip:** Select more than one item by holding down the Ctrl key down when you select items from the menus.
5. Click Save.

## Editing Recommendation Rules

You can edit a recommendation rule when changes are necessary, even if a rule has been approved.

### To edit a rule

1. Click the Websites tab, and click Recommendation Rules.  
A list of the existing rules appears.
2. Find the name of the rule that you want to edit.
3. Pause the pointer on the rule that you want to edit, and click Edit.
4. Click Save.

## Deleting Recommendation Rules

You can delete a recommendation rule only if it has a New status. Approved rules cannot be deleted because the Delete button is disabled.

### To delete a recommendation rule

1. Click the Websites tab, and click Recommendation Rules.
2. Find the recommendation rule that you want to delete.  
To narrow your search, use the name, status, and date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.
3. Pause the pointer on the recommendation rule, and click Delete.
4. Click OK to confirm that you want to delete the recommendation rule.

## Searching for Recommendation Rules

This procedure describes how to find a recommendation rule in Oracle CRM On Demand Marketing.

### To search for a recommendation rule

1. Click the Websites tab, and click Recommendation Rules.
2. On the Main Topics screen, enter a keyword or character string in the Rule Name field.

**3.** Click Filter or press Enter.

To search for a rule, use the status and published date. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

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## Managing Offers and Templates

This chapter covers working with offers and templates. It includes the following topics:

- [Working with Offers](#)
- [Working with Templates](#)
- [Working with the Hosting Library](#)

### Working with Offers

*Offers* are incentives extended to target contacts to encourage them to respond to a marketing program or activity. An offer can be one of the following:

- A white paper or case study available for download
- A Webinar or seminar on a topic that is relevant to the contact
- A subscription to a newsletter or other publication
- A set of incentives or gifts used to attract attendance at events, such as a company booth at a trade show or a company-sponsored seminar

You must ensure that offers remain relevant, time appropriate, and hold value for the target audience so that the offer encourages prospects to respond and provide information about themselves in exchange.

This topic contains the following information:

- [About Offer Fields](#)
- [About Offer Statuses](#)
- [Creating Offers](#)
- [Searching for Offers](#)
- [Editing Offers](#)
- [Deleting Offers](#)
- [Displaying Programs Using an Offer](#)
- [Displaying Offer Last Modified by Date and User](#)
- [Working with Templates](#)
- [Creating Templates](#)
- [Searching for Templates](#)
- [Editing Templates](#)

- [Deleting Templates](#)

## About Offer Fields

Business-to-business offer types, such as white papers, case studies, even events, can be created in the form of a single-click download. Offer attribute tags, such as Offer Name, Offer Description and so on, might not display properly on a Thank You program or open a Returning User page if the offer fulfillment type is not configured correctly. The following table describes the offer fields.

Field	Description
Offer Name	Unique name for the offer.
Offer Code	Unique code for the offer. By default, the name of the offer is copied into the Offer Code field with spaces replaced with underscores (_).
Offer Type	A mandatory field. The offer types are created during the setup. For more information, see <a href="#">Configuring Offer Types</a> .
Large Graphic URL	If you are offering a document or publication, provide a URL link to show the document name (and optional cover) on the Web page. To use a file from the hosting library, click the library icon.
Small Graphic URL	In the Email Invitation (sent to the contact to download the offer), on the Registration Form, or in a catalog, provide a URL for a small thumbnail picture of the offer that can be displayed on a microsite Web page. To use a file from the hosting library, click the library icon.
Offer Content	If the offer is a white paper or another document offered in electronic form for downloading, then the offer content can either be referenced to its hosted location on the Web, or it can be uploaded to Oracle CRM On Demand Marketing. To use a file from the hosting library, see <a href="#">To use a file from the hosting library</a> .
Short Description	The description of the offer. It can have a maximum of 2000 characters. The short description can be brief promotional text to generate interest.
Long Description	This is the description of the offer. It can have a maximum of 4000 characters. It can provide a more in-depth description, including what the prospect can expect to learn. It can be used to entice the target audience to register for and download an offer.

The following procedure describes how to access the hosting library.

### To use a file from the hosting library

- To use a file from the hosting library, click the library icon.

## About Offer Statuses

All newly defined offers have a status of New. To have a status of Approved, all offers must be approved and available for use by programs. The following table describes the offer statuses.

Status	Description
New	All new offers have a status of New.
Approved	When the initial setup of an offer has been completed, the offer must be accepted so that the status changes to Approved. Only offers with a status of Approved can be associated with programs and can be edited.

## Creating Offers

You cannot associate an offer with a program until it has been accepted. When an offer is accepted, the offer header information, including the offer type, cannot be changed. For more information on offer fields, see [About Offer Fields](#).

### To create an offer

1. Do one of the following:
  - Click Assets, Offers, and then New Offer.
  - From the Quick Access menu, select Create Offer.
 The New Offer screen appears.
2. Complete all the required fields.  
For more information on offer fields, see [About Offer Fields](#).
3. Do one of the following:
  - Enter a URL to indicate where the offer can be found online or provide a thumbnail or larger picture of the offer.
  - Upload a file to make the offer accessible within Oracle CRM On Demand Marketing.
4. Enter a brief description of the offer in the Short Description field.  
You use the description in outbound email invitations for the new offer, on Web forms, or Web pages promoting the offer.
5. Enter a more comprehensive description in the Long Description field.  
It must describe the offer content and entice contacts to register and download the promotional content.
6. Click Save, and then click Accept.

## Searching for Offers

When navigating through pages of offers, you can navigate page by page, or select a particular page to display by entering the page number. By default, Oracle CRM On Demand Marketing displays 10 records on a page. You can increase the number of records on a page by choosing a larger number from the Display menu. You can also set a default pagination size value for the number of rows displayed on a list screen by editing your user profile. For more information on user profiles, see [Configuring My Setup Options](#).

### To search for an offer

1. Click the Assets tab, and click Offers.
2. From the View menu, select the required view.  
You can search by the offer name, offer code, offer type, status, or date the offer was last modified.
3. On the Main Offers screen, enter a keyword, an offer name, offer code, or character string in the Offer Name field.
4. Click Filter or press Enter.
5. (Optional) To search by offer type, click the down arrow, select the offer type, and click Filter.

6. (Optional) To search by offer status, click the down arrow, select the offer status, and click Filter.
7. (Optional) To search by the last modified date, do the following:
  - a. Enter a date, or click the Calendar icon.  
A date selection window appears.
  - b. Enter a date range, or enter a value in the Search Within Last Days field.
  - c. Click OK

**Tip:** You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

## Editing Offers

If you cannot find a particular offer, perform a search. For more information, see [Searching for Offers](#).

Before you edit an offer you can check if an offer is being used in a program. Any edits you make to an offer are automatically updated in the program. If you are not the program owner, check with the owner to ensure the edits you want to make are appropriate. For more information on what programs use offers, see [Displaying Programs Using an Offer](#).

### To edit an offer

1. From the Offers main screen, pause the pointer on the list of offers.
2. Find the offer that you want to edit.
3. Pause the pointer on the offer that you want to edit, and click Edit.  
The Offer Details screen appears in edit mode. You can edit an offer even if it has a status of Approved.
4. Make your edits, and click Save.  
If an offer is already associated with a program, the edits you make to the offer are updated in the program configuration.

## Deleting Offers

You can delete offers from the Offers screen under the Assets tab, which displays all existing offers. If you cannot find a particular offer, perform a search. You cannot delete an offer that is associated with a program. Approved offers cannot be deleted. The Delete button is disabled. For more information about searching, see [Searching for Offers](#). For more information on which programs use offers, see [Displaying Programs Using an Offer](#).

### To delete an offer

1. From the Offers main screen, pause the pointer on the list of offers.
2. Find the offer that you want to delete.
3. Verify that the offer is not associated with a program.  
For more information on which programs use offers, see [Displaying Programs Using an Offer](#).



4. Do one of the following:
  - a. If the offer is not associated with a program, pause the pointer on the offer, and click Delete.
  - b. If the offer is associated with a program, delete the offer from the programs, and then delete the offer.
5. Click OK.

## Displaying Programs Using an Offer

You can check which programs have an offer associated with them. Your target audience might have received an email with an offer already. You can check where the offer is being used before you edit it. Any change made to an offer is reflected wherever it is used.

### To check which offer uses a program

1. Click Assets, and then click Offers.
2. Click the offer name.  
The Offer details screen appears.
3. Click Programs using this offer.  
A list of programs with which the offer is associated appears.

## Displaying Offer Last Modified by Date and User

You can keep track of the offer history by displaying the last time an offer was modified and which user made the modifications, using Oracle CRM On Demand Marketing.

### Displaying the offer last modified by date and user

1. Click Assets.  
The Offers screen appears.
2. Find the offer that you want to display.
3. Click the offer name.  
The following history appears:
  - Created Date
  - Created By
  - Last Modified Date
  - Last Modified By

## Working with Templates

Marketing departments use templates to apply corporate or campaign branding to objects created in Oracle CRM On Demand Marketing. Templates increase the recognition, recall, and response from the target audience by ensuring branding consistency and by conveying that a message is sent from a trustworthy source. The following types of templates can be used within Oracle CRM On Demand Marketing:

- Branding templates

- Email templates
- Microsite templates

To use consistent branding throughout a campaign, you must use both email templates and branding templates. You can use an email template to set the style and branding for outbound email invitations including initial invitations and repeat invitations. The same email template can be used for the postregistration Thank You Email or a more general template can be chosen for postregistration email.

A branding template, when applied to inbound registration, governs the appearance of the preregistration landing page, the Web form landing page, the postregistration Thank You email, and returning user Web pages.

Microsite templates provide structure, consistency, and branding for multiple microsites or within a single microsite.

All Oracle CRM On Demand Marketing users might not be able to create templates. However, all users can use them when the templates are defined. Only a system administrator has permission to create new templates in topics, microsites, or offers.

## Creating Templates

Consider the following items when creating a template:

- **Entity.** Select one of the marketing entities required to associate the template with a microsite or topic.
- **Template Tags.** Oracle CRM On Demand Marketing supports specific tags for branding templates in addition to the `$$MBOS_CONTENT$$` tag, which instructs a template to insert the Web form at the tag position.

The three new tags are:

- **M2L\_HEAD.** `$$M2L_HEAD$$` goes inside `<head>` tag. This is also where .js and .css files are located.
- **M2L\_TITLE.** `$$M2L_TITLE$$` is the browser title and goes inside the `<title>` tag.
- **M2L\_BODY.** `$$M2L_BODY$$` is the new tag to call Web form content.

### To create a template

1. Click Assets, and then click one of the following:
  - Email Templates
  - Branding Templates
  - Microsite Templates
2. From the View menu, do one of the following:
  - Select a view for email templates:
    - All Templates
    - My Templates
    - HTML Email Templates
    - TEXT Email Templates
  - Select a view for branding and microsite templates:
    - All Templates

- My Templates

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**Note:** You create a template for email, branding and microsite templates, using the same procedure. However, microsite templates must be approved and accepted before you apply them.

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3. Click New Branding Template.

The New Branding Template definition screen appears.

4. Enter the following information:

- **Template name.** Required field. Each template must have a unique name that describes the use of the template according to corporate standards.
- **Description.** Enter a complete description for the product line or solution that the template promotes. You must also enter any information required by users to customize, edit, or deploy the template. You must specify whether the template or campaign is cobranded with a business or channel partner. Also indicate the resulting, required approval cycles.

5. Click Next.

The New Template builder screen appears.

6. Do one of the following:

- **Import an HTML File.** You can upload an HTML file into the WYSIWYG editor for fine-tuning and previewing. For more information, see [Using HTML Files](#).
- **Insert a Tag.** You can choose the option tags that allow the insertion of profile attribute smart tags into the template. For more information, see [Inserting Tags](#).

7. Click Save.

8. If you are creating a microsite templates, thoroughly test, approve, and accept the template before deployment.

## Searching for Templates

When navigating through pages of templates, you can navigate page by page, or select a particular page to display by entering the page number. By default, Oracle CRM On Demand Marketing displays 10 records on a page. You can increase the number of records on a page by choosing a larger number from the Display menu. You can also set a default pagination size value for the number of rows displayed on a list screen by editing your user profile. For more information on user profiles, see [Configuring My Setup Options](#).

### To search for a template

1. Click Assets, and then click one of the following:

- Email Templates
- Branding Templates
- Microsite Templates

2. From the View menu, select the required view for the template that you want to find.

3. Enter search criteria for one of the following fields:
  - **Template Name.** Enter keywords or a character string.
  - **Template File.** Enter keywords or a character string.
  - **File Size.** Enter a value in kilobytes.
  - **Last Modified Date.** Do one of the following:
    - Enter a date, or click the Calendar icon. A date selection window appears.
    - Enter a date range, or enter a value in the Search Within Last Days field.
4. Click Filter or press Enter.
5. Click OK.

If you cannot find the template, ensure that you have selected the correct template type and correct view. You can also click the sort columns once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

## Editing Templates

You can edit templates from the templates selection under the Assets tab, which displays all existing email, branding, and microsite templates. If you cannot find a particular template, perform a search. For more information on finding templates, see [Searching for Templates](#).

### To edit a template

1. Click Assets, and then click one of the following:
  - Email Templates
  - Branding Templates
  - Microsite Templates
2. From the View menu, select the required view for the template you want to edit.
3. Pause the pointer on the template that you want to edit, and click Edit.  
The Template Definition (header) screen appears in Edit mode.
4. Edit the template as necessary, and click Save.
5. Click Next to edit the template code.
6. Edit the template code as necessary, and click Save.

## Deleting Templates

You can delete templates from the Templates screen under the Assets tab, which displays all existing email, branding, and microsite templates. If you cannot find a particular template, perform a search. For more information on finding templates, see [Searching for Templates](#).

### To delete a template

1. Click Assets, and then click one of the following:
  - Email Templates
  - Branding Templates
  - Microsite Templates

2. From the View menu, select the required view for the template that you want to delete.
3. Pause the pointer on the template, and click Delete.
4. Confirm you want to delete the template and click OK.

## Working with the Hosting Library

The hosting library is where you store image and text files for use in your email campaigns and microsites. The hosting library supports the following formats:

- Adobe Portable Document Format (.pdf)
- GIF (.gif)
- JPEG (.jpg and .jpeg)
- Microsoft Excel (.xls and .xlsx)
- Microsoft Word (.doc and .docx)
- Microsoft Powerpoint (.ppt and .pptx)
- Portable Network Graphics (.png)

The images and files in your hosting library can be used in both emails and microsites. If you have many files, you can search for specific files.

### Searching and Filtering Files

You can search for files that meet specific criteria. You can also use the filter to help you locate files.

#### To search and filter files

Do one of the following:

1. Enter criteria into one or more of the following search fields and click Filter:
  - File Name
  - File Type
  - File Size (in kb)
  - Last Modified Date

You can search for files that meet specific criteria by entering the criteria into one or more of the following search fields and clicking Filter. For example to find all GIF files, enter GIF in the File Type field, and click Filter.

To search for files with a date range or files that have been modified in the last few days, click the calendar icon to the right of the Last Modified Date field to display more date-oriented search fields.

2. To remove the filter, clear all text from all the search fields, and click Filter.

### Organizing Files and Folders

You can organize your files into folders. While you are displaying the hosting library screen, the left pane includes a folders section. The main folder is the Home folder. You can add your own folders within the Home folder. Folders can contain other folders.

#### To organize files into folders

Do one of the following:

- To create a folder, click New
- To rename an existing folder, select it, and then click Rename.
- To delete a folder, select it, and then click Delete.

When you have create folders, you can move files into those folders.

#### **To move a file into a folder**

1. Select the file's check box.
2. Click Move to Folder.
3. In the folder list, choose an existing folder.
4. Click Move.

The hosting library has some options for displaying files and file names.

#### **Changing the Display Options in the Hosting Library**

Do one of the following:

- Change from Thumbnail view (icons) to List view (text). To make this change, use the View menu to choose a view.
- Sort or reorder the list. While in List view, click a column heading to change the sort order.
- Change the quantity of items being displayed. At the bottom of the display, use the Display menu to choose 10, 25, 50, 75, or 100 items.
- If the quantity of items to be displayed is more than can fit on a page, you can use the Go To Page control to select a different page.

You can display a preview of any file, which is faster than opening the file.

#### **To preview a file**

- Pause the pointer over a file until the hover menu appears, and then click Preview.

#### **Related Topics**

- [Adding a New File to the Hosting Library](#)
- [Using the File Edit Page](#)

## **Adding a New File to the Hosting Library**

You can add files in the following formats to the hosting library:

- Adobe Portable Document Format (.pdf)
- GIF (.gif)
- JPEG (.jpg and .jpeg)
- Microsoft Excel (.xls and .xlsx)
- Microsoft Word (.doc and .docx)
- Microsoft Powerpoint (.ppt and .pptx)
- Portable Network Graphics (.png)

#### **To add new files to the hosting library**

1. Click the Assets tab, then click Hosting Library.

2. Click New File.
3. Select a Source Type; either Local (a file on your computer) or External (a file on a Web site), and do one of the following:
  - For a local file, click Browse, navigate to a file on your computer, and click Open.
  - For an external file, enter the URL of the file.
4. (Optional) Enter a description of the file.
5. (Optional) Enter an Alt Text description.

Alt Text is used to describe images for screen readers. If you are adding an image file, add an Alt Text description for it.

6. (Optional) Enter a border size, from 1 to 9 (in pixels).
7. Click Save.

The file might take a while to load, depending on its file size. When the file has completed loading, the Asset File Details page appears. For more information, see [Using the Asset File Details Page](#). The external files that you add to the hosting library have a thumbnail image that displays in the library. However, the image file is still stored externally. It is not hosted by Oracle CRM On Demand Marketing. If you want to have Oracle CRM On Demand Marketing host an externally hosted image, download the image to your local drive first, then upload it to the hosting library.

8. To return to the hosting library, click Back.

## Using the Asset File Details Page

The Asset File Details page displays information about a selected file in the hosting library, such as its name, size, and last modified date.

### To use the Asset File Details page

1. Click one of the following buttons:
  - Delete.
  - Edit. For more information, see [Using the File Edit Page](#).
  - Preview. Displays the file for viewing only.
  - Back. Returns to the hosting library.

## Using the File Edit Page

Use the File Edit page to replace the file with a different file, and to edit file information.

### To edit file information

1. Edit the following fields.
  - Description
  - Alt Text
  - Border Size
2. (Optional) Click Replace Image.

3. Click Save.



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## Working with Contacts and Lists

This chapter covers managing contacts. It includes the following topics:

- [About Contacts](#)
- [Standard Attributes for Contacts](#)
- [Creating a Contact](#)
- [Searching for a Contact](#)
- [Editing a Contact](#)
- [Deleting Contacts](#)
- [Displaying Contact Activity History](#)
- [About Target Lists](#)
- [Creating Lists](#)
- [About Contact Attributes](#)
- [About Importing Contacts](#)
- [Searching for Accounts](#)

### About Contacts

A *contact* is an individual who has been identified as a potential prospect, and the record is stored in the Oracle CRM On Demand Marketing contact database or in an external contact database. This data is used for nurturing and converting prospects through marketing campaigns. A contact might have previously expressed an interest in a company's products, solutions, or services or might have been acquired from a third-party list vendor. The contact might have been acquired by targeting attributes, such as industry, job title, or company name. Contacts have the potential to become opportunities for the company.

Contacts can be any of the following:

- Existing customers
- New contacts who found the company Web site while surfing the Web
- Prospects who responded to company communication in the past
- People who were contacted by Sales but have not yet purchased
- Individual records acquired from external list sources
- Individuals referred by other contacts

You can create contact records one at a time or upload lists of contacts to the database.

If Oracle CRM On Demand Marketing is used with Oracle CRM On Demand, a built-in automatic two-way synchronization process updates contact information and adds new records. Rules governing automatic updates can be defined by an administrator of Oracle CRM On Demand Marketing. For more information, see [About Configuring Object Synchronization](#).

**To display and manage contacts**

- Click the Contacts tab, and select a view from the View list.

The views available for contacts include:

- All Contacts
- Recently Modified Contacts

## Standard Attributes for Contacts

The following table shows the standard attributes for a contact. You can create additional attributes within the Insight Attribute category to accommodate business needs. For more information on attributes, see [About Contact Attributes](#).

Field Name	Field Description
Owner Id	While creating a contact, this field indicates the Oracle CRM On Demand Marketing user who is logged in and creating the contact. It is a reference to a sales representative who owns the specific contact. For leads and contacts synchronized from Oracle CRM On Demand, the Owner Id comes from Oracle CRM On Demand.
Salutation	Prefix (for example, Mr./Ms.)
First Name	Free-form text-entry field.
Middle Name	Free-form text-entry field.
Last Name	Free-form text-entry field.
Second Last Name	Free-form text-entry field.
Suffix	For example, Jr., II, PhD, and so on.
Email	Free-form text-entry field.
Job Title	Can be either a free-form text-entry field or a picklist of predetermined values.
Company Name	Free-form text-entry field.
Address 1	Free-form text-entry field.
Address 2	Free-form text-entry field.
City	Free-form text-entry field.
State	Usually a list of values from which to select.
Country	Usually a list of values from which to select.
ZIP Code	Free-form text-entry field.
Office Phone	Free-form text-entry field. You can use Web forms to validate entries.
Office Phone Extension	Free-form text-entry field. Avoid including a prefix, such as <i>X</i> or <i>Ext.</i> You can use Web forms to validate entries.
Home Phone	Free-form text-entry field. You can use Web forms to validate entries.

Field Name	Field Description
Home Phone Extension	Free-form text-entry field. Avoid including a prefix, such as <i>X</i> or <i>Ext.</i> You can use Web forms to validate entries.
Mobile Phone	Free-form text-entry field. You can use Web forms to validate entries.
Fax Number	Free-form text-entry field. You can use Web forms to validate entries.
Fax Extension	Free-form text-entry field. Avoid including a prefix, such as <i>X</i> or <i>Ext.</i> You can use Web forms to validate entries.
Email Valid	If a contact record has a valid email address, set the Email Valid field to Yes. If an email address displays an error message as undeliverable, that information is reported from the email vendor to Oracle CRM On Demand Marketing and the Email Valid field is automatically set to No.
Email Permitted	If a contact unsubscribes to a program through a third-party email distribution vendor's Unsubscribe link, that information is reported back to Oracle CRM On Demand Marketing and the Email Permitted field is set to No. Unsubscribed contacts are automatically added to the Oracle CRM On Demand Marketing global opt out table and any record with that unique email address is excluded from future emails. For more information, see <a href="#">About Email Opt Outs</a> .
Work Phone Valid	If a contact record has a valid business phone number, set this field to Yes, either manually or through a contact import. If the business phone number is incorrect, set this field to No. When a new correct business phone number is acquired, enter it in the contact record, and reset this field to Yes.
Work Phone Permitted	If the contact has given permission to be contacted by phone, set this field to Yes. If the contact has denied permission, set this field to No.
Home Phone Valid	If a contact record has a valid home phone number, set this field to Yes, either manually or through contact import. If the home phone number is incorrect, set this field to No. When a new correct home phone number is acquired, enter it in the contact record, and reset this field to Yes.
Home Phone Permitted	If the contact has given permission to be contacted by home phone, set this field to Yes. If the contact has denied permission, set this field to No.
Cell Phone Valid	If a contact record has a valid cell phone number, set this field to Yes, either manually or through contact import. If the cell phone number is incorrect, set this field to No. When a new correct cell phone number is acquired, enter it in the contact record and reset this field to Yes.
Cell Phone Permitted	If the contact has given permission to be contacted by cell phone, set this field to Yes. If the contact has denied permission, set this field to No.
Mail Valid	If a contact record has a valid postal address, set this field to Yes. If the contact's postal address is invalid, set this field to No.
Mail Permitted	If the contact has given permission to be contacted by post, set this field to Yes. If the contact has denied permission, set this field to No.
Fax Number Valid	If a contact record has a valid fax number, set this field to Yes, either manually or through contact import. If the fax number is incorrect, set this field to No. When a new correct fax number is acquired, enter it in the contact record and reset this field to Yes.
Fax Number Permitted	If the contact has given permission to be contacted by fax, set this field to Yes. If the contact has denied permission, set this field to No.
Contact Id	Contact ID for Oracle CRM On Demand Marketing.
Contact Type	Contact Type, for example, lead, contact, or guest.
External Id 1	External application Id 1.
External Id 2	External application Id 2.

Field Name	Field Description
Create Program Registration	Select this check box to manually create a registration for a contact.
Campaign Name	Indicate the campaign used to register this contact.
Program Name	Indicate the program used to register this contact.

## Creating a Contact

This procedure describes how to create a contact manually. For information on how to upload contacts into Oracle CRM On Demand Marketing through a list import, see [About Importing Contacts](#).

### To create a contact manually

1. Do one of the following:
  - From the Quick Access menu on the left, select Create Contact.
  - Click the Contacts tab, and then click New Contact.
2. Complete the fields for the contact.

For more information, see [Standard Attributes for Contacts](#).

## Searching for a Contact

There might be many pages of contact records. You can click each page or select a particular page that you want to display by entering the page number. By default, Oracle CRM On Demand Marketing displays 10 records on a page. Increase the number of records on a page by choosing a larger number from the Display XX rows at a time menu. You can also set a default Pagination Size value for the number of rows displayed on a list screen by editing your user profile. For more information on editing your profile, see [Configuring My Setup Options](#).

### To search for a contact

1. Click the Contacts tab.
2. Select a view to narrow or expand your search.
3. Do one of the following:
  - On the main Contacts screen, enter a keyword or character string in the Contact First Name, Last Name, Email Address, or Company Name field.
  - On the main Contacts screen, click the Calendar icon, enter search criteria either as a date range or Within the Last XX days, and then click OK.
4. Press Enter or click Filter.

**Tip:** Click the column header once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

## Editing a Contact

This procedure describes how to edit a contact.

**To edit a contact**

1. From the Contacts main screen, pause the pointer on the contact that you want to edit, and click Edit.
2. In the Contact Details screen, make the edits, and click Save.
3. (Optional) To edit the insight or Oracle CRM On Demand attribute category, click the Contact Name instead of Edit.

The contact record appears.

4. Click Edit or Configure in the Oracle CRM On Demand section of the record, and make changes.

**Editing the Opt In/Out Status of a Contact**

If a contact who previously had opted-out now requests to be included in future emails, you must edit the contact record manually to change the Opt In/Opt Out status.

If the initial opt out request was captured through a third-party email distribution vendor's Unsubscribe link, the Email Permitted field would have been set to No. If a manual edit to the contact record changes the Email Permitted field to Yes, Oracle CRM On Demand Marketing automatically sends a request job to the email distribution vendor so that the contact's status is changed for the distribution vendor as well.

Manual changes to a contact's Opt In status are reflected immediately within Oracle CRM On Demand Marketing, but the Opt In request job to the email distribution vendor runs only once every hour. Therefore, there is a brief time period before the status is updated. You can display opt-out requests through the Activities tab and Opt Outs menu. An Export to CSV utility is also available from this screen.

**Assigning Registration to a Contact Manually**

You can manually assign registration details to individual contact records. However, manually assigned registrations do not pass through the response funnel for checking against defined rules, or for lead scoring.

**To assign registration to a contact manually**

1. From the Contacts main screen, pause the pointer on the contact that you want to edit, and click Edit.
2. Scroll down to the end of the header/demographic section of the contact record, and complete the fields.

## Deleting Contacts

You can delete single or multiple contacts from the Contacts main screen under the Contacts tab. If a contact has been published to Oracle CRM On Demand or was imported from Oracle CRM On Demand, you must delete the contact in Oracle CRM On Demand. That deletion synchronizes with Oracle CRM On Demand Marketing. However, you can delete a contact in Oracle CRM On Demand Marketing first, and then delete it in Oracle CRM On Demand. Contact records flagged with Global Email opt out are not deleted.

**To delete a single contact in Oracle CRM On Demand Marketing**

1. From the Contacts main screen, do one of the following:

- Pause the pointer on the contact, and click Delete.
- Click Delete next to the New Contact button.

A window appears.

2. Confirm your request to delete the contact by clicking OK, otherwise click Cancel, and then click Save.

**To delete multiple contacts in Oracle CRM On Demand Marketing**

1. From the Contacts main screen, select the check boxes to the left of the contacts.
2. Click Delete.
3. Confirm your request to delete the contacts by clicking OK, otherwise click Cancel.

## Displaying Contact Activity History

Oracle CRM On Demand Marketing tracks every interaction with each contact in your contact database. This history is displayed in the Campaign Activity History and Website Activity History sections of the main Contacts screen.

The Campaign Activity History section shows if a contact has done the following:

- Been targeted for a campaign or program
- Opened an invitation email
- Clicked through from an email
- Registered for an offer
- Been presented with an offer (from a microsite)
- Downloaded an offer
- Attended events

Campaign Activity History can be expanded to show detail for each campaign. For example, if respondents to a campaign are sent to a telemarketing or inside sales call center for prequalification before they are delivered to Sales, expanding the campaign details displays the telemarketing status and queue to which the prospect was assigned.

The Website Activity History section shows the following information for the contact:

- Average site visit duration (in minutes)
- Number of page views
- Number of site visits
- Total time spent (in minutes)

**Tip:** You can use a contact's activity history to see what communication has transpired between the company and the contact through marketing campaigns and programs. You can also use activity history in list segmentation. Contact Activity History and Website Activity History are attribute profiles that are available wherever the Oracle CRM On Demand Marketing condition builder is used to define rules, such as designing Web forms, scoring rules, and queue assignment rules.

**To display a contact's activity history**

1. From the Contacts main screen, click the contact's name.
2. At the bottom of the Contact Details screen, expand the Campaign Activity section or the Website Activity section.

## About Target Lists

A *list* (also known as a target list) is a set of contacts that you target for marketing programs. Lists are compiled by establishing target criteria that are based on contact attributes. Inclusion lists are target lists for adaptive and dynamic workflow campaigns. Depending on the type of campaign, a list might come from different sources, such as a rented or purchased list from a third-party vendor, a list imported from event attendees, a house list downloaded from the contacts already available in the contact database, or a combination of all these sources.

## List Types

The following table describes the types of lists available in Oracle CRM On Demand Marketing.

List Type	Description
Production List	The production list includes the complete list of contacts that receive the outbound email invitation when a program launches.
Seed List	The seed list is a set of employees or internal contacts who receive the outbound email invitation at the same time that production list contacts receive it. Seed lists typically include marketing team members, managers, and sales representatives who want to receive the same information that prospects receive.
Test List	The test list is a set of contacts who receive outbound email invitations during the test program launch of email campaigns. Several team members (including the campaign owner) can test the end-to-end flow of the program before launching the program to prospects.
Inclusion List	The inclusion list is a target list for automated (adaptive and dynamic workflow) campaigns. Inclusion lists can be made up of multiple target lists. Automated campaigns can have inclusion lists for the entire campaign and more specific production lists at the program level.
Exclusion List	Exclusion lists are optional and can contain criteria to identify any contacts to be excluded from the production list. They might include contacts who have opted out or who have known invalid email addresses.
External list	The external list is a set of contacts acquired from an outside list vendor. The list count is stored in Oracle CRM On Demand Marketing for the purpose of calculating response rates.

## List Modes

The following table describes the list modes available in Oracle CRM On Demand Marketing.

List Mode	Description
Static List for a Regular or Static Campaign and Program	<p>Target lists for static campaigns and programs are automatically set to static list mode. Campaign owners can choose the list mode for both inclusion and exclusion lists associated with adaptive and workflow automated campaigns. If the list mode is Static, Oracle CRM On Demand Marketing takes a snapshot of the contacts who meet the list filter and condition criteria at the time of the program launch, then this is the list of contacts who receive the outbound email message.</p> <p>If the list is created well before the intended program launch, the list owner must manually refresh the list count before launch to make sure the total count meets expectations. New contacts entered into the contact database either through a registration form, manual contact creation, or contact import might qualify to be included in the list between the time the list was created and the time that the program launches.</p>
Static List for an Automated Campaign	<p>For both types of automated campaigns (adaptive and workflow), the campaign owner can include existing contacts in the database, or only contacts who meet the inclusion list criteria after the campaign launches. Both inclusion lists and exclusion lists for automated campaigns can be either Static or Dynamic. A static list is used to include existing contacts only. A dynamic list is used to include only future contacts. Both types of lists can be associated with a single automated campaign.</p> <p>To associate a static list with an automated campaign, create the list in the usual manner, and make sure that the list mode is set to Static before the campaign launches. For more information, see <a href="#">Associating Lists with Workflow Campaigns</a>.</p>
Dynamic List for an Automated Campaign	<p>For both types of automated campaigns (adaptive and workflow), the campaign owner can include the existing contacts in the database or only contacts who meet the inclusion list criteria after the campaign launches. Both inclusion lists and exclusion lists for automated campaigns can be either Static or Dynamic. A dynamic list is used to include only contacts who meet the list filter and condition criteria after the automated campaign launches.</p> <p>To associate a dynamic list with an automated program, create the list in the usual manner and ensure that the list mode is set to Dynamic before the campaign launches. Dynamic lists and static lists can both be associated with a single automated campaign.</p>
Static or Dynamic Exclusion Lists for Automated Campaigns	<p>Either a static or dynamic exclusion list or both can be associated with an automated campaign (adaptive or workflow). A static exclusion list filters only those existing contacts who would otherwise be eligible for the campaign. The filter is based on a known characteristic.</p> <p>For example, if you have a static inclusion list associated but want to exclude all contacts from a certain account (ABC Company), create a static exclusion list to capture and filter all existing contacts from ABC Company. However, to also exclude all contacts who become eligible from ABC Company in the future, a dynamic exclusion list that filters contacts from that account excludes both existing and future contacts.</p>

## About Profiles and Profile Attributes

Oracle CRM On Demand Marketing provides a list of standard profile attribute fields. These fields store the information about a contact and the information collected from a contact's responses to marketing programs. The predefined standard attributes of Oracle CRM On Demand Marketing belong to the demographic attribute category. For information about the contact demographic profile attributes, see [Standard Attributes for Contacts](#).

Oracle CRM On Demand attributes are also synchronized and made available in Oracle CRM On Demand Marketing under the following two categories:



- Oracle CRM On Demand Contact
- Oracle CRM On Demand Lead

Oracle CRM On Demand Marketing users can create additional attributes in the insight category of attributes. Insight attributes typically capture information about a contact's interests or purchase plans regarding specific products, solutions, and services.

Oracle CRM On Demand Marketing captures many attribute values and valuable contact activity information automatically from contact responses to marketing programs.

The following profiles are available:

- Account
- Contact Activities
- Contact Microsite Activities
- Contact Owner
- CRM On Demand Contact
- CRM On Demand Lead
- Demographic
- Insight
- Prospect Insights
- Website Activities

The following table shows Contact Activities attributes.

Field Name	Field Description
Attended for Offers (Count)	The count of offers
Click Through Count	The number of contacts who clicked a pretty URL in an email
Obtained Offers count	The number of offers that the contact downloaded or obtained
Offers Presented (Count)	The count of offers presented
Opened Invitation Emails (Count)	Indicates the total number of emails opened and displayed by the contact
Registered for Offers (Count)	Total number of offers that the contact registered for
Targeted for Offers (Count)	Total number of offers that the contact was targeted for

The following table shows Contact Microsite Activities attributes.

Field Name	Field Description
Obtained Offers (Count)	Total number of offers that the contact obtained from the microsite either by downloading or physical fulfillment. For electronic offers, it is equal to the number of unique download clicks for offers.
Registered for Offers (Count)	Total number of offers that the contact registered for
Total Number of Visits	Total number of times the contact browsed the microsite

Field Name	Field Description
Viewed Recommended Offers (Count)	Total number of offers that were shown to the contact when the contact visited the microsite. Depending on the contact profile, an offer might or might not be shown to the contact on the microsite or topic page. For information about campaign automation, see <a href="#">Working with Campaign Automation</a> .

The following table shows the Prospect Insights attributes.

Field Name	Field Description
Prospect Scores	Score that the prospect generated through funnel and qualification rules.
Prospect Status	The prospect status as it is being routed through the funnel. The valid statuses are: New, Filtered, Scored, Open, Qualified, Disqualified, Published, Rejected, Deleted, Assigned, and Sent.
Telemarketing Status	Status assigned by call center agents: Open Prospects, Call Attempted Prospects, Contacted Prospects, Qualified Prospects, Disqualified Prospects.

The following table shows Account Profile attributes. Accounts are imported from Oracle CRM On Demand.

Field Name	Field Description
Account Name	Name of the account. In most small companies, this is the company name. In large companies, it might be a particular division or site.
Account Type	Type of the account.
Account Owner	The sales account manager who manages the account.
Annual Revenue	Annual revenue generated by the account.
City	City where the company site is located.
Country	Country where the company site is located.
Industry	The industry that the company is associated with.
Number of Employees	Number of employees in the company.
Phone Number	Main phone number of the site.
Postal Code	Postal code of the city where the company site is located.
Rating	The rating for the account.
SIC Code	Standard Industry Classification code.
State/Province	State or province where the company is located.
Ticker Symbol	The symbol under which the company's stock trades on the stock exchange.

The following table shows Web site activities attributes.

Field Name	Field Description
Average Site Visit Duration (minutes)	The average time that the contact spent on the site.
Number of Page Views	The number of pages that the contact displayed.

Field Name	Field Description
Number of Site Visits	Number of sites that the contact visited.
Total Time Spent (in minutes)	Total time that the contact spent on the Web site.

The following table shows Contact Owner attributes.

Field Name	Field Description
Address 1	Address line 1 of the business location for the contact.
Address 2	Address line 2 of the business location for the contact.
Chat URL	Chat URL of the contact.
City	City where the contact is located.
Company	Company the contact works for.
Country	Country where the contact business address is located.
Department	Department of the company that the contact works in.
Division	Division of the company the contact works in.
Email	Email address of the contact.
Email Signature	Email signature of the contact.
Fax	Fax number of the contact.
First Name	First name of the contact.
Image URL	Image URL of the contact.
Job Title	Role the contact plays in his job.
Last Name	Last name of the contact.
Mobile Phone	Cell phone number of the contact.
Postal Code	Postal code of the contact company address.
State	State where the contact business address is located.
Website URL	Web site of the contact.
Work Phone	Work phone number of the contact.

## Operators

You use operators to build conditions that compare attribute values to a static value or another attribute.

The following table describes the operators available in Oracle CRM On Demand Marketing.

Operator	Description
Equal To	The profile attribute value must be the same as the value provided in the condition.
Not Equal To	The profile attribute value must be different from the value provided in the condition.
Exists	The profile attribute has a value. The value for the attribute might be valid or invalid.
Not Exist	The profile attribute does not contain a value (the value is NULL or blank).

Operator	Description
Is Less Than	The profile attribute value must be less than the value provided in the condition.
Is Less than or Equal To	The profile attribute value must be less than or equal to the value provided in the condition.
Is Greater Than	The profile attribute value must be more than the value provided in the condition.
Is Greater Than or Equal To	The profile attribute value must be more than or equal to the value provided in the condition.
In List	The profile attribute value must be available in the list of values provided in the condition. The different values in the list must be separated by a comma.
Not In List	The profile attribute value must not be available in the list of values provided in the condition. The different values in the list must be separated by a comma.
Contains	The profile attribute value contains the text or characters provided in the condition.
Does Not Contain	The profile attribute value does not contain the text or characters provided in the condition.
Starts With	The profile attribute value must start with the text or characters provided in the condition.
Ends With	The profile attribute value must end with the text or characters provided in the condition.
AND	The filter condition includes contact records in the list only when both conditions related to this operator are true.
OR	The filter condition includes contact records in the list when records match either or both conditions. <b>Note:</b> OR conditions must be listed first in the sequence of conditions.

## Guidelines for Using Operators

This topic provides guidelines for using operators. Consider the following:

- **Equal To/Not Equal To.** These operators perform precise, exact case-sensitive matching. Therefore, *Denver* is not the same as *denver*. You can use Contains and Does Not Contain to target variable values that are entered as a comma-separated character strings.
- **Exists.** This operator returns all records where a value is present for the chosen attribute. This does not mean that the value present is valid or formatted correctly. The Exists operator can help determine how many contact records in your database have a value for a particular attribute, such as Industry.

**Tip:** A best practice is to use this operator to make sure that a value for Email exists for each contact in your target list for outbound email programs.

- **Not Exists.** This operator returns all records where no value is present for a particular attribute. This operator is not synonymous with a negative value, such as No, False, or zero (0). For example, if you enter a condition, such as Email Permitted is Not Equal To No, this condition excludes any contact records that are blank.

- **In List/Not In List.** These are powerful operators for selecting multiple values from a list of valid entries for an attribute. For example, if you are building a target list to include contact records for five countries in Europe only (Germany, Italy, France, United Kingdom, and Spain), you might want to use the In List operator for the Country attribute, and select the five target countries while pressing the Ctrl Key. This method is much more efficient than building a separate condition for each country. If you are creating a list to download contact records for all countries in Europe except Norway, Finland, and Sweden, use the Not In List operator to select these countries from the list while pressing the Ctrl key.
- **Contains/Does Not Contain.** You can use these operators to build conditions with inexact or incomplete matching. You can enter a character string for your value or multiple values separated by commas. To define a list condition to find all contact records for a certain target account, it is more efficient and accurate to search by email domain rather than company name, which might be entered in a variety of ways.

You can also use the following auto-generated conditions in Oracle CRM On Demand Marketing as operators:

- **Within past XX days.** Enter the number of days within which the profile attribute value was last modified.
- **Restricted by.** A list of values for a particular restriction.

## Creating Lists

When creating exclusion lists, Oracle CRM On Demand Marketing displays the option, Apply to all New Programs. Select the Apply to all New Programs check box to apply the exclusion list criteria to new program production lists. It is not applied to program production lists for automated campaigns.

Only accepted lists can be associated with the programs. When a list is associated to a program or to an automated campaign, it cannot be deleted.

### To create a list

1. Do one of the following:
  - From the Quick Access menu on the left, select Create List.
  - From the Contacts tab, click the Target Lists subfunction, and then click New List.
2. In the New Target List Header screen, enter the header information to describe the new target list.
3. Choose the List Type from the list. For more information on list types, see [List Types](#).
4. Do one of the following:
  - Click Save to save the list header information and complete the list configuration at another time. The main List screen displays the new list first in the list. Do one of the following:
    - To edit the list header, click Edit.
    - To complete the list creation, click the linked List Name, then click Add in the List Conditions section.
  - Click Next.

The List Creation Wizard guides you through the next step in list creation.

5. In the Conditions screen, apply filters to the list by choosing values in the Profile, Profile Attributes, and Operator lists. Profile attributes vary according to the profile that you select.

For more information, see [About Profiles and Profile Attributes](#).

6. In the Value field, enter or select a valid value.
7. (Optional) To define complex conditions, click the Advanced Grouping Option link and enter the conditions. For example, you can group conditions, such as (1 and 2) or (3 and 4) to evaluate the conditions from both lists and display the contacts that satisfy either of the conditions. Each condition is numbered.
8. (Optional) To add more filters, click Add More.

The filters are added in the sequence in which they are listed. For example, if there are 1000 contacts in Oracle CRM On Demand Marketing, the first filter returns only 500. The second filter checks only those 500 contacts for new conditions. When the filters are completed, Oracle CRM On Demand Marketing provides a list count of how many contacts meet the criteria.

## Searching for Lists

There can be many pages of lists. You can click each page or select a particular page to display by entering the page number. By default, Oracle CRM On Demand Marketing displays 10 records on a page. Increase the number of records on a page by choosing a larger number from the Display XX rows at a time menu. You can also set a default Pagination Size value for the number of rows displayed on a list screen by editing your user profile.

### To search for a list

1. Click the Contacts tab, and click Target Lists.
2. Select a folder or view to narrow your search.
3. Enter search criteria in the List Name, List Type, Count, Count Updated Date, or Status field.
4. Click Filter or press Enter.

**Tip:** Click the column header once to display the list in alphabetical, ascending order. Click the column header twice for descending order.

## Editing Lists

You can edit lists from Target Lists main screen under the Contacts tab, which displays all existing lists.

### To edit a list

1. From the Lists main screen, pause the pointer on the list that you want to edit, and click Edit.
2. In the List Header screen, edit the fields, and click Save.
3. (Optional) To edit the list conditions, click the list name in the Lists main screen.
4. In the List Conditions section, click the Edit (pencil) icon, and make the necessary changes.

## Deleting Lists

You can delete lists from Target Lists main screen under the Contacts tab, which displays the existing lists. You can delete a list when the list status is New. When the list has been accepted, or if it is being used by any program, you cannot delete it. The Delete button is disabled.

### To delete a list

1. From the Lists main screen, pause the pointer on the list, and click delete.
2. Confirm the request to delete the list.

## Copying Lists

You can copy lists from Target Lists main screen under the Contacts tab, which displays all existing lists.

### To copy a list

1. From the Lists main screen, pause the pointer on the list that you want to copy, and click Copy.

Because all list names must be unique, Oracle CRM On Demand Marketing inserts the words "Copy of" in front of the copied List Name and a series of numbers after the List Name.

2. (Optional) To edit the new list, click Edit.
3. If you edit the list name or list code, then for consistency make sure that they are the same. List names can contain spaces, but list codes cannot. You must replace all spaces underscores (\_) in the List Code.
4. If necessary, edit the list conditions of the copied list.

## Refreshing List Counts

This procedure describes how to refresh a list count.

### To refresh the count of contacts associated with a list

1. From the Lists main screen, pause the pointer on the list, and click Edit.
2. In the List Header, click Refresh.

## Displaying the Programs That Use a List

This procedure describes how to display the programs that use a list.

### To display the programs that use a list

1. From the Lists main screen, pause the pointer on the list, and click Edit.
2. In the List Header, click List References.

## Displaying, Deleting, and Exporting Contacts in a List

This procedure describes how to display the contacts in a list.

### To display the contacts in a list

1. From the Lists main screen, click a list name.

2. Click View Contacts.

The following procedure describes how to export individual contacts from a list.

**To export a list**

1. From the Lists main screen, pause the pointer on the list, and click Edit.
2. Click Export.
3. Select the check boxes for all the attributes to export in each category.
4. Do one of the following:
  - If there is no preferred column order, or if you want to order the data after exporting, click Export.
  - To order the columns in the exported spreadsheet before you export the file, click Sequence and Export.
5. Select an attribute, and click the up or down arrow to reposition it in the list.
6. When the attributes are in order, click Export.

Oracle CRM On Demand Marketing exports target lists in comma-separated value (CSV) format. To edit the file, open it with Excel. You can also open and then save the file in Excel rather than in CSV format.

## About Contact Attributes

An *attribute* is a piece of information collected from a prospect to build a contact profile. A profile of a specific contact consists of data for one or more attributes. Examples of contact attributes include:

- Size of company
- Budget
- Product interest
- Registration date

## About Attribute Categories

The following table describes the attribute categories available in Oracle CRM On Demand Marketing.

Attribute Category	Description
Demographic attributes	These are standard attributes that describe a contact, such as name, address, company name, job title, and phone numbers. Demographic attributes are predefined in Oracle CRM On Demand Marketing.
Insight attributes	These attributes provide more detailed information describing a contact, including areas of interest, budget, purchase period, and so on. These attributes are configured in the Attribute module under the Contacts tab.
Oracle CRM On Demand Lead	Lead attributes in Oracle CRM On Demand are made available in Oracle CRM On Demand Marketing under this category.
Oracle CRM On Demand Contact	Contact attributes in Oracle CRM On Demand are made available in Oracle CRM On Demand Marketing under this category.



## Creating Attributes

This procedure describes how to create an attribute. You cannot create demographic attributes in Oracle CRM On Demand Marketing.

### To create an attribute

1. Do one of the following:
  - From the Quick Access menu on the left, select Create Attribute.
  - Click the Contacts tab, and then click New Attribute.
2. Complete the fields to describe the new attribute.
3. (Optional) To define answers and answer codes that are identical, select Enable Answer Codes.

If answers and answer codes are not identical, do not select this check box. For more information about answer codes, see [Creating Questions and Defining Answers](#).

## Creating Questions and Defining Answers

When you create attributes, you can define the types of questions and answers that you want the contact to provide.

### To create questions

1. From the Quick Access menu on the left, select Create Attribute.
2. Complete the fields to describe the new attribute, then click Save.
3. In the New Question screen, complete the fields for the new question. If you select Single Choice or Multiple Choice for the Question Type, you can enter the answers manually or select from the existing answers.

The following table describes the fields on the New Question screen.

Field Name	Field Description
Question Text	This is the text of the question that users see.
Question Identifier	This is a unique identifier for the question for use in rule definitions. It is useful because you can have multiple questions with the same text and different answer options.
Question Type	A question can accept the answers of the following types: Text, Boolean, Single Choice, or Multiple Choice. For more information on question types, see <a href="#">Question Types</a> .
Data Type	This field is applicable only if the question type is Text. It defines the type of data to be captured for this question. Validations are performed during data capture according to the type. For email data type, the format is checked to make sure a valid email address is provided.
Data Length	This field is applicable only if the answer type is Text. It defines the maximum length for the data to be captured for this question.

### Question Types

The following question types are available:

- **Single Choice.** One item can be selected from an answer list.

- **Multiple Choice.** More than one item can be selected from an answer list.
- **Boolean.** Boolean questions always have either a True or False value. They cannot be blank. If a contact does not answer a Boolean question on a Web form, the result is the field is set to False. If you select Boolean, Oracle CRM On Demand Marketing asks for the answer that is associated with True and False values. You can use existing answers or create new ones.
- **Text.** Specifies the type of data the user can submit. If you select Text, you must choose one of the following data types:
  - **Decimal.** This data type must be a fractional number in tenths.
  - **Email.** This data type must be of a valid email format, such as user@domain.com.
  - **Integer.** This data type must be a whole number.
  - **Phone.** This data type must be in one of the following formats:  
 France: 1234567890, 12 12 12 12 12, 12-12-12-12-12, +33 (0) 123456789  
 Germany: (1234) 1234-1234, (1234)/1234-1234, 1234 1234 1234,  
 1234 / 1234 1234, 1234 / 1234-1234, +49 12 12345678, 123 12345678  
 United Kingdom: (123)1234567, 1234567890, (123)123456, 123456789,  
 +44 (0) 1234 123456, 12345 123456  
 United States of America: (123) 123-1234, 123-123-1234, 1234567890
  - **Postal Code.** This data type must be in U.S. format and one of the following: xxxxx or xxxxx-xxxx.
  - **String.** This can be any alphanumeric text, including special characters.

In all cases, data length is the number of characters that the input field accepts. Insight profile attributes can have a maximum of 2000 characters. Demographic profile attributes can have a maximum of 255 characters.

### Enabling Answer Codes

Answer codes are internal codes that Oracle CRM On Demand Marketing uses to uniquely identify answers, while allowing multiple departments to ask the same question in different ways.

When you define a question and pick a list of answers, you can map each answer to an answer code. For example, for the Marital Status attribute, your company can collect information using differently phrased questions, as shown in the following table.

Question	Answers	Answer Codes	Mapping
Are you married?	Yes/No	Married/Single	Yes indicates Married No indicates Single
What is your marital status?	Married/Single	Married/Single	Married indicates Married Single indicates Single

### To enable answer codes

1. From the Quick Access menu on the left, select Create Attribute.
2. Select the check box, Enable Answer Codes, then click Save.
3. Click New Answer Codes, enter the values, then click Save.

4. Click New Answers.
5. If you want answers and answer codes to be identical, click Copy Answers from Answer Codes and select the answer codes that you want to copy as answers. If you do not want answers and answer codes to be identical, enter values for the new answers.

If you do not select the Enable Answer Codes check box, you can manually enter answers or select from existing answers. Oracle CRM On Demand Marketing automatically creates answer codes that are identical to the answers.

## Searching for Attributes

This procedure describes how to search for an attribute.

### To search for an attribute

1. Click the Contacts tab, then click Contact Attributes.
2. Enter search criteria in the Attribute Name, Description, Attribute Category, or Last Modified Date field.
3. Click Filter, or press Enter.

## Editing Attributes

This procedure describes how to edit an attribute.

### To edit an attribute

1. From the Contact Attributes main screen, pause the pointer on the attribute that you want to edit, and click Edit.
2. In the Attribute Header screen, make the edits, and click Save.
3. In the Attribute Details screen, edit answers, answer codes, clicking the Edit (pencil) icon and make the necessary changes.

Changes to an attribute take effect immediately on any Web forms that use the attribute.

## Deleting Attributes

If the attribute is in use, you cannot delete it until you remove it from the items where it is being used. If the attribute is used by an active Web form, you cannot delete it. If an attribute is used by an inactive Web form, you can remove the attribute from the Web form and then delete the attribute.

### To delete an attribute

1. From the Contact Attributes main screen, pause the pointer on the attribute, and click Delete.
2. Confirm the request to delete the attribute.

## About Importing Contacts

Oracle CRM On Demand Marketing can import contacts from Excel and CSV (comma-separated value) files. You can either upload import files from a local drive or transfer the import files from an FTP server. Oracle CRM On Demand Marketing supports the XLS and XLSX Excel file formats. The contact information to be imported

can be in any language, but multibyte data, such as Japanese or Chinese requires that the file be encoded in UTF-8 format.

You can use folders to organize contact import configurations. For example, you might want to organize imports by geographic region or by market segment, or consolidate all contact imports related to events in an events folder.

Configuring an import is a multistep process and Oracle CRM On Demand Marketing provides a wizard to guide you through the steps.

Oracle CRM On Demand Marketing applies global deduplication rules during contact imports and also lets you create custom deduplication rules for each specific import. This prevents the creation of duplicate records for contacts that already exist in the Oracle CRM On Demand Marketing database.

You can import registrations/attendance for multiple programs from a single import file.

### **Process of Importing Contacts**

Before importing contacts, you must create an import file. The first row in the import file (the header row) contains a comma separated list of field names that are picked up for mapping. You can import contacts by using the following procedures with the Import Contacts wizard.

To import contacts, perform the following tasks:

1. [Choosing Import Options](#)
2. [Selecting an Import File](#)
3. [Mapping Fields in a Contact Import](#)
4. [Defining Deduplication Rules](#)
5. [Defining Merging Rules](#)
6. [Scheduling Import Jobs](#)
7. [Configuring Import Details](#)
8. [Checking the Status of an Import Job](#)

### **Choosing Import Options**

This procedure describes how to choose import options.

#### **To choose import options**

1. Click the Contacts tab.
2. Click the folder where you want to store the import configuration.
3. Click the Import Contacts subfunction.
4. Click New Import.
5. (Optional) In the Import Options screen, you can select both of the registration and attendance options in the same import:
  - **Upload Registration.** This option marks the contact as registered for a specified program. If a previous registration already exists for the contact, then no action is taken. If no matching contact exists then a new contact is created and marked as registered. Operational reports are available to track the scoring and queue assignment for the imported registrations.

- **Upload Attendance.** This option marks the contact as having attended a specified program. If a previous attendance already exists for the contact, no action is taken. If no matching contact exists, a new contact is created and marked as attended.

Oracle CRM On Demand Marketing displays and validates the maximum number of records that can be imported in a file. The maximum number varies, depending on the import options you select. When importing only contacts (without the registration or attendance date), the maximum number is 20,000. For imports that include the registration or attendance date, the maximum number of contacts is 1000.

### Selecting an Import File

This procedure describes how to select an import file.

#### To select an import file

1. Click Browse or provide the FTP details to upload the import file. For FTP and SFTP, the following information is required:

Field	Description
FTP Server	The FTP server name, for example, ftp.acme.com.
Username	The FTP user name.
Password	The FTP password.
Remote Directory	The directory on FTP server where the file is located.
File Matching Pattern	For recurring FTP import jobs, you can specify the file matching pattern. Oracle CRM On Demand Marketing looks for files that use the pattern and imports them. The options are: <ul style="list-style-type: none"> <li>■ Starts With</li> <li>■ Ends With</li> <li>■ Contains</li> <li>■ Exact</li> </ul>

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**Caution:** When downloading lists for a contact import from an FTP or SFTP server location, Oracle CRM On Demand Marketing renames the file on the FTP or SFTP server after the import has been processed. Therefore, use a file matching pattern other than Exact. If Oracle CRM On Demand Marketing looks for a file name that matches the import file for subsequent import jobs, the file is not found, and the import fails. Either change the file name for the next import to be run each time to match the file name specified in the import configuration, or use one of the partial file name matching options, such as Starts With, Ends With, or Contains.

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1. (Optional) If you are importing registrations and attendance, you must specify the source for the program name and the registration or attendance dates or both. There are two options:
  - You can manually select the program name and registration date and attendance dates. Only a single program can be selected.

- You can specify that the option program name and registration or attendance information is available in the columns of the import file.

The Validation screen appears.

2. Compare the number of records in the import file to the maximum number of records you can import. Review any file parsing errors that might be reported on the Validation screen. If there are errors, decide whether to cancel the import and address the errors, or continue the process with the errors.
3. Do one of the following:
  - If you specified that the program name and registration or attendance information is available in the columns of the import file, you must select the column names in the file that correspond to the program name and registration or attendance dates.

For the date columns, choose one of the following date formats:

- MM/DD/YYYY
- DD/MM/YYYY
- YYYY-MM-DD

For date/time columns, choose one of the following formats:

- YYYY-MM-DDThh:mm:ss+hh:mm
- YYYY-MM-DDThh:mm:ss-hh:mm

- If you did not specify that the program name and registration or attendance information is available in the columns of the import file, click Next.

### Mapping Fields in a Contact Import

This procedure describes how to map fields in a contact import.

To map fields in a contact import

- In the Field Mapping screen, do one of the following:
  - Select the Source Field Name and Source Format attributes from the lists.
  - Click Auto Prepopulate Mapping to map the attributes according to the source field name.

Column headers in the import file must match the attribute names for Auto-Prepopulate to map them. For example, if the attribute name is Company, and the source field name is Company Name, Oracle CRM On Demand Marketing cannot prepopulate. You must manually map the field name in the import file to the corresponding attribute.

The Transformation field section can be mapped manually, depending on the data integrity rules.

If you indicated that the program name and registration or attendance dates are columns in the import file, you cannot map these columns to any target profile or use them for custom deduplication rules.

In the Field Mapping screen, there are six data types available, as described in the following table:

Data Type	Description
String	You can map First Name as String, because it can contain alphanumeric characters. You can also decide to choose First Character Uppercase to ensure data consistency and usability for personalization. For State, if you use two-character state abbreviations, you can decide to select String and then All Uppercase.
Number	You can map Phone Number as number.
Email	Email Address can be mapped as email.
Date	Date of Birth can be mapped as date. NOTE: Source Format Selection is mandatory if the source data type is Date.
Boolean	The values are: True/False, 0/1, or Yes/No.
Date/Time	For example: <ul style="list-style-type: none"> <li>■ MM/DD/YYYY HH24:MI:SS</li> <li>■ MM/DD/YYYY HH:MI:SS AM</li> <li>■ DD/MM/YYYY HH24:MI:SS</li> <li>■ DD/MM/YYYY HH:MI:SS AM</li> </ul>

If an Answer Code Mapping screen appears during field mapping, the imported file might have some columns that are mapped to Oracle CRM On Demand Marketing attributes that have answer codes. You must manually map entries from the import file to the correct answer codes. For example, if the CSV file has a country value of *India*, and the Oracle CRM On Demand Marketing country attribute has an answer code for India as *Ind*, then enter the source value as it appears in the CSV file (India), and map it to the country answer code in the Target Value (Ind).

The Answer Code Mapping screen requires that you select a resolution option: Flag Error, Create Answer Code, and Assign Default. For data integrity, select Flag Error. The Import Job Status detects any nonmatching answers and provides an opportunity to correct and reimport those contacts.

### Defining Deduplication Rules

There are two kinds of deduplication rules allowed in the Deduping Rules step of the contact import process.

- **Global deduplication rules.** These rules are defined at a high level and apply to every contact import.
- **Custom deduplication rules.** These conditions are defined in addition to the Global Deduping Rules and apply only to the current import. You can create a custom deduplication rule that is based on any attribute in the import file.

The following procedure describes how to define a custom deduplication rule.

#### To define a custom deduplication rule

1. Select the Define Custom Dedupe Rule option.
2. Select an attribute by clicking its check box.
3. (Optional) Select the matching type (Exact, Starts With, Contains, Fuzzy Match).
4. Click Add to complete the custom deduplication rule.
5. After you have configured all the rules, click Next.

### Defining Merging Rules

Merging rules define how values in the import file are handled if a duplicate record is found in the contact database. The most commonly used option is Update if Blank. The determination must be made whether the Import File can contain more current information than the existing record. If the information in the Import File was provided by the contact, it is probably more current.

The following procedure describes how to define the merging rules for a contact import.

#### To define merging rules for a contact import

- In the Merging Rules screen, select the Source Field Name and the matching type.  
Select from the following options:

Option	Description
Update if Blank	While updating the matched contact (using deduplication rules), Oracle CRM On Demand Marketing enters the attribute value from the import file only if it is currently blank.
Do not Update	While updating the matched contact (using deduplication rules), Oracle CRM On Demand Marketing does not change the attribute value in the existing contact record.
Overwrite	While updating the matched contact (using deduplication rules), Oracle CRM On Demand Marketing overwrites the attribute value in the existing contact record with the attribute value in the import file.
Append	While updating the matched contact (using deduplication rules), Oracle CRM On Demand Marketing appends the attribute value from the import file to the attribute value in the existing contact record. When choosing Append, note the limitations of the character count for attribute values.

### Scheduling Import Jobs

The following procedure describes how to schedule an import job.

#### To schedule an import job

- In the Scheduling screen, do one of the following:
  - Click the Calendar icon to select a date.
  - To schedule the import job to process immediately after it is saved, click Now.
  - For FTP-based import configurations, you can set the import to run once or automatically according to a schedule that you define.

### Configuring Import Details

The following procedure describes how to configure import details.

#### To configure import details

1. In the Import Config Details screen, complete the following fields:
  - **Configuration Name.** Enter the name for the configuration.
  - **On Success Email.** If the import is successful, an email is sent to the specified email address.
  - **On Error Email.** If the import job fails, an email is sent to the specified email address.



2. In the Field Mapping section, review the details of the mapped fields, the merging rules, and the deduplication rules.
3. Click Save.

**Checking the Status of an Import Job**

The following procedure describes how to verify the status of an import job import.

**To verify the status of the import job**

1. From the Quick Access menu, choose Actions.
2. Click Check Job Status.
3. (Optional) When an import has finished successfully, return to the main Import Contacts list screen, and click Success.

A status report for the import job appears.

If there is a record count for a category in the report (for example, Number of Contacts Created), you can click View to see the corresponding contacts. This detail is available for 30 days after the day of the contact import. After 30 days, only summary metrics are available to verify the status of the import.

**Importing Multibyte Data**

You can import multibyte data, such as contacts in Asian languages by either using Excel files (XLS, XLSX formats) or using CSV files encoded in UTF-8 format. If the CSV file is not encoded in UTF-8 format, it results in contacts showing nonlegible characters.

**Searching for Contact Import Configurations**

Your marketing team can create a standard naming convention for contact import configurations. You might want to include the list source, a list code, a reference, or the name of a program for which the list is to be used. For example, you might include: your name, the import date, or some combination of these. Standardizing a naming convention makes it easier to find the contact import configuration.

**To search for a contact import configuration**

1. Click the Contacts tab, then click the Import Contacts subfunction.
2. Select the folder and view (All Lists or My Lists).
3. Search using the configuration name, type, schedule, or status.

**Editing Import Configurations**

You can edit contact import configurations from the Import Contacts main screen under the Contacts tab, which displays a list of the existing configurations for contact import. The edit function is available until the import job is complete.

**To edit an import configuration**

1. Click the Contacts tab, and then click the Import Contacts subfunction.  
The main list screen showing all contact import configurations appears.
2. Pause the pointer on the configuration that you want to edit, and click Edit.  
A wizard guides you through each step in the import process.

## Deleting Import Configurations

You can delete an import configuration record at any time. The delete function deletes only the record of the import configuration job. It does not stop the import from occurring. Until the time that the import job is scheduled to execute, you can edit the configuration to change the scheduled execution or change other details.

You can also delete the configuration to cancel the execution of the import job entirely. Oracle CRM On Demand Marketing prompts you to confirm the request to delete the configuration.

## Copying Import Configurations

If you receive lists for importing configurations into Oracle CRM On Demand Marketing from the same list source regularly and the lists are always formatted the same way, then you can save time by copying a list import configuration.

### To copy a list import configuration

1. Click the Contacts tab, and then click the Import Contacts subfunction.  
The main list screen showing all contact import configurations appears.
2. Pause the pointer on the configuration that you want to copy, and click Copy.  
The wizard guides you through each step in the import. It retains previously entered information.
3. Select a new import file.
4. If the data in the import file fits the previous configuration, you do not have to re-enter options in the rest of the import steps.
5. You must enter a new schedule for the import.
6. You must rename the import configuration.

## Moving Import Configurations

Folders are available to help organize contact import configuration jobs. The following procedure describes how to move an import configuration to a folder.

### To move an import configuration to a folder

1. Click the Contacts tab, then click the Import Contacts subfunction.
2. Select the contact import configuration that you want to move.
3. Click Move to Folder.  
The existing folder structure for import configurations appears.
4. Click the folder to which you want to move the configuration, and then click Move.

## Searching for Accounts

The following procedure shows you how to search for accounts.

### To search for accounts

1. Enter search criteria in the Account Name, Account Owner, Annual Revenue, or Account Type field.

2. Click Filter, or press Enter.



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## Managing Activities, Queues, and the Call Center

This chapter covers managing activities and related information. It includes the following topics:

- [About Contact Activities](#)
- [Displaying Queue Activity](#)
- [About the Call Center](#)
- [Displaying Call Center Reports](#)
- [About Email Opt Outs](#)

### About Contact Activities

The Activities tab in Oracle CRM On Demand Marketing contains the following subfunctions:

- **Contact Activities.** These activities relate to contact registrations and Web site visitors.
- **Queues.** Leads and contacts in the Oracle CRM On Demand Marketing workflow are grouped into queues for processing.
- **Call center.** This is the Oracle CRM On Demand Marketing module responsible for telemarketing, which enables telemarketing staff to contact leads and prospects through cold calls, followup calls and campaigns.
- **Email Optouts.** This module in Oracle CRM On Demand Marketing enables telemarketing staff to remove contacts from future communications.

The Contact Activities pane provides information on contact registrations and Web site visitors. It can display the following information:

- All known Web site visitors
- All registrations
- Recent known Web site visitors
- Recent registrations (Recent is defined as within the last 14 days.)

This topic contains the following information:

- [Displaying Queue Activity](#)
- [About the Call Center](#)

- [Displaying Call Center Reports](#)
- [About Email Opt Outs](#)

## About Registrations

A *registration* is a captured response originating from an outbound marketing activity that is executed from within Oracle CRM On Demand Marketing or from a marketing activity conducted outside of Oracle CRM On Demand Marketing, which directs respondents to Oracle CRM On Demand Marketing.

When a contact clicks a link in an outbound email invitation or a link in an online banner advertisement, the contact is directed to a Web form to enter registration data. Registration data for specific programs can also be assigned to contacts through a list import.

You can also assign details manually to contact records one at a time from the contacts module. To manually assign registration to a contact, click the dynamic Edit button and scroll down to the end of the header or demographic section of the contact record.

In cases where some registrations are captured outside of Oracle CRM On Demand Marketing (for example, if you are using Web forms hosted elsewhere), you can configure the Oracle CRM On Demand Marketing Web services API to automatically create a matching registration within Oracle CRM On Demand Marketing in real-time. You can assign registration data but not attendance data. You must set the date of registration to a date in the future.

When each registration is captured, it passes through all the stages of the response funnel, including lead scoring rules. Oracle CRM On Demand Marketing then verifies that the registration meets the defined criteria for one of several score levels.

### Score Levels for Registrations

The following list is an example of some of the score values available:

- **Hot.** Prospects with this status must immediately be referred to Sales for followup.
- **Warm.** Prospects with this status can be followed up by Sales Department or can be retained for further nurturing by the Marketing Department.
- **Cold.** Prospects who have not indicated a strong interest and need additional nurturing to be elevated to a higher score.

Oracle CRM On Demand Marketing also assigns the following status value to registrations:

- **New.** Oracle CRM On Demand Marketing creates a new prospect based on a new response by a previously unknown contact.
- **Deleted.** A prospect's responses matched bad or junk data as maintained by Oracle CRM On Demand Marketing. Consequently, the prospect remains in the rejection state of the response funnel.
- **Rejected.** Oracle CRM On Demand Marketing rejected the contact because of standard restrictions, for example, the contact works for a competitor.
- **Filtered.** The prospect progressed passed the rejection and suppression rules and is ready to be rated.
- **Assigned.** The prospect has been assigned to one or more queues.
- **Sent.** The prospect has been sent to a queue distribution (email or email as CSV).

- **Published.** The lead is published to Oracle CRM On Demand, the status changes to Published.
- **Open.** The prospect is waiting for a followup call in a call center queue.
- **Closed-Not a Lead.** An agent disqualified the prospect in the telemarketing queue.
- **Qualified.** An agent qualified the prospect in the telemarketing queue.

Oracle CRM On Demand Marketing scores contacts. The scores are based on your company's defined business rules. Oracle CRM On Demand Marketing either qualifies contacts for distribution to a call center or sales representative. Contacts not yet qualified for followup are retained for further nurturing and continuous progressive profiling until the score changes and the contact qualifies. This technique ensures that only the qualified contacts are referred to Sales for followup.

## Displaying Registration Details

When you select All Registrations from the View menu, you can display details for a listed registration.

### To display the details for a listed registration

1. Click the registration date in the list view.  
The Registration Details screen opens. All information captured by the registration Web form appears.
2. (Optional) Click Contact Details to edit the record.
3. (Optional) Click the program name with which a registration is associated to display the program details.

## Searching Registration Details

When you select All Registrations from the View menu, you can search for a registration.

### To search for a registration

1. Click the Activities tab, and then click Contact Activities.
2. Select Recent Registrations or All Registrations from the View menu.
3. Enter text or a keyword in the Registration Date, Program Name, First Name, Last Name or Email Address fields.
4. Click Filter.

## Displaying Web Site Activity

The Website Visitors pane provides read-only information on Web site activity.

Click the View menu to display the following information:

- All Web site visitors
- Known Web site visitors
- Unknown Web site visitors

Web site visits by individuals connecting to the Internet using an Internet Service Vendor (ISV) can have their domains or IP addresses modified by the ISV. Oracle CRM On Demand Marketing Business Intelligence Reporting enables you to filter Web site

visits with ISV domains. An attribute in Oracle CRM On Demand Marketing flags a Web site visit when it comes from an ISV domain.

**To display Web site visitors details**

1. Select All Known Website Visitors, Recent Known Website Visitors, or All Website Visitors from the View menu.

The corresponding screen opens.

2. Click the Visit Date, Contact Name, or Email Address to see details of the visit to your microsite.
3. (Optional) Click Contact Details to display supplementary information.

**To search for a Web site visitor**

1. Select All Known Website Visitors, Recent Known Website Visitors, or All Website Visitors from the View menu.

The corresponding screen opens.

2. Enter text or a keyword in the Date, First Name, Last Name, Email Address, or Total Page Views fields.
3. Click Filter.

## Displaying Queue Activity

The Queues pane provides information on the following:

- All Queue Assignments
- Recent Queue Assignments (within the last 14 days)

You can display queue activity for queues or you can search for a specific queue by performing search by queue name.

Leads or prospects are assigned to queues and marked with one of the following statuses:

- **Assigned.** This prospect is assigned to a queue, but it is not yet published to Oracle CRM On Demand or sent to a distribution list
- **Pending.** This status is the same status as the Assigned status.
- **Published.** This prospect is published to Oracle CRM On Demand.
- **Sent.** This prospect is sent to the distribution list defined for the queue.
- **Failed.** This prospect cannot be assigned to a queue because the required information is missing from the queue assignment rules.

You can display and search for the following information about each lead or prospect assigned to a queue:

- First name
- Last name
- Email address
- Company name
- Queue name
- Status



- Delivery date

## About the Call Center

Many companies employ telemarketing or internal sales team as part of their Marketing or Sales organizations. Telemarketing staff are responsible the following activities:

- Qualifying initial leads before leads are distributed to the Sales Department for followup.
- Responding to general-inquiry forms on the company's Web site.
- Performing cold calls, call blitzes or other types of outbound contact to customers and prospective customers in conjunction with marketing campaigns.

The call center or telemarketing functionality in Oracle CRM On Demand Marketing is a module that can be made available to telemarketing and inside sales staff, without needing to make other Oracle CRM On Demand Marketing modules available beyond the scope of their responsibilities. This also enables you to provide access to third-party providers who are performing telemarketing activities for your company.

You can perform telemarketing activities, such as cold calling, followup, and response qualification, with Oracle CRM On Demand Marketing, allowing you to capture all data in one consolidated contact record.

## About Telemarketing

The Call Center pane displays information on all prospects currently assigned to the call center for further contact and qualification. Oracle CRM On Demand Marketing provides an integrated workflow for an in-house or third-party prequalification team to determine if prospects are ready to be referred to the Sales Department for followup and conversion.

Telemarketing, inside sales, or call center representatives can log in to Oracle CRM On Demand Marketing and review the leads assigned specifically to them for prequalification. Agents can select a lead to work on and launch call activity screens to record their conversations and results.

When you record telemarketing activities in Oracle CRM On Demand Marketing, you also gather additional information and add them to the contact record in the Oracle CRM On Demand Marketing database. You can display prospect status and other attributes assigned by telemarketing agents for use in campaign development and list segmentation.

Agents can also perform the following activities in Oracle CRM On Demand Marketing:

- Select which assigned leads to work with
- Log any call attempts and log if the attempt was successful
- Capture additional information on the prospect by completing a call script Web form
- Note comments for further followup
- Schedule future followup activities
- Change the prospect's status
- Qualify or disqualify the prospect

- Record the disqualification reasons that can be used in future list segmentation
- Move the prospect to another queue if the prospect was assigned incorrectly. An agent requires specific, user-role permissions to perform this action.
- Move a prospect to another queue, for example, a queue that delivers leads to Sales, or a queue that delivers leads to Oracle CRM On Demand.

Telemarketing management can use Oracle CRM On Demand Marketing to track and report on agent workload, progress and performance. Marketing campaign owners gain better visibility to the quality of leads generated by their activities and resulting lead disposition. Marketing managers can also develop campaigns to continue nurturing leads that cannot yet be referred to Sales. Telemarketing agents can capture relevant information to inform leads periodically who are interested but not yet ready to purchase.

### Guidelines for Marketing Campaign Owners

This topic provides guidelines for marketing campaign owners. When developing campaigns, marketing managers must consider if telemarketing has a role in following up and qualifying responses. If so, the following campaign and program components must be configured:

- **Include telemarketing management and agents' insights into the campaign strategy.** Also make the subject matter, offer, scheduling and other materials available for followup.
- **Determine whether targeted contacts who respond to the campaign will be further nurtured by the Marketing Department.** Determine whether telemarketing will contact them.
- **Develop and associate a call script Web form with the campaign.** This call script Web form must include qualifying questions specific to the program, as well as demographic contact information for the telemarketing agent to verify during the conversation. For more information, see [Associating Call Scripts](#).
- **Design queues and queue assignment rules.** This option enables you to direct responses from the campaign to appropriate call center personnel.
- **Design future nurture and followup-campaign activities.** This option enables you to stay in touch with responding contacts who are not yet ready to purchase, or are disqualified for any of the custom-defined disqualification reasons.

## About Call Center Views

Views allow telemarketing agents, managers and marketing campaign owners to review call center activity quickly. You can review each prospect from only one view. The exception to this is a prospect with a Call Attempted or Contacted status. This prospect might also be visible in the Pending Follow-up View if a specific time has been set for followup by the agent who initially contacted the prospect. Telemarketing agents can display all queues and prospects assigned to those queues for which they are responsible. For more information on how a prospect moves or advances through the Views, see [About the Telemarketing Prospect Statuses](#).

### View Definitions

The information you can display and search in Oracle CRM On Demand Marketing depends on the view you have selected. The following views are available in the Call Center pane in Oracle CRM On Demand Marketing:

- **Open Prospects.** The default view for new prospects assigned to a call center only. (No calls have been attempted and no action has been taken).
- **Call Attempted Prospects.** An agent attempted to reach a prospect but was unable to speak to the prospect. If a followup date was set, then the prospect appears in the Pending Follow-up View.
- **Contacted Prospects.** The agent successfully reached and spoke to the prospect. However, the agent neither qualified nor disqualified the prospect as a result. If a followup date was set, the prospect appears in the Pending Follow-up View.
- **Qualified Prospects.** An agent determined that the prospect qualified based on the defined scoring rules, and the prospect is referred to the Sales Department.
- **Disqualified Prospects.** An agent determined that the prospect is not qualified for referral to Sales at this time and has disqualified the prospect.
- **Pending Follow-up.** Any prospect in either the Contacted or Call Attempted status for which a followup date has been set.

## Configuring Your Call Center

The following procedure describes how to set up the call center functionality in Oracle CRM On Demand Marketing.

### To configure the call center

1. Set up user profiles and appropriate roles for telemarketing agents.  
For more information on setting up roles and user profiles, see [Configuring My Setup Options](#).
2. Assign login credentials to each agent.  
Call center permissions can be added to existing roles, or if users can access only the call center functionality, you can define a new role.
3. Develop an initial strategy for the types of responses directed to telemarketing for followup and prequalification.  
For example, is telemarketing responsible for contacting all leads captured at trade shows?
4. Define or refine the definitions of prospect status and communicate them clearly to the team. For example, when is a prospect qualified? Do you know the meaning of the disqualification reasons?
5. Set up the telemarketing queues according to the criteria most applicable to your situation, for example, territory, product line, subject matter, and so on.  
You might want to set up a queue for each telemarketing agent so that leads are not delivered to a pool from which agents then select. Also, you might want to have telemarketing agents assigned to specific sales territories, for which you can build a queue for each territory and assign leads by geographic location. For more information on setting up queues, see [Configuring Queues](#).
6. Define the queue assignment rule conditions for each telemarketing queue.  
For more information on setting up queues, see [Configuring Queues](#).
7. If you decide to import contacts to assign to telemarketing agents for cold-calling or followup, develop a list of the required attributes so that imported contacts are assigned to the correct queues.

8. Create generic and campaign-specific call scripts.
9. Inform telemarketing agents when to begin expecting leads.

### Guidelines for Managing Leads

This topic provides guidelines for managing leads. Consider the following:

- **Assign leads to only one queue.** Ensure that you do not send responses simultaneously to telemarketing and sales, which might result in multiple representatives from your company contacting prospects. However, there might be legitimate cases where you want to send prospects both to a call center queue and also to Oracle CRM On Demand.
- **Assign more than one agent to a telemarketing queue.** This action prevents the delay of leads if one agent is out of the office.
- **Define a generic call script for leads not associated with a subject-specific campaign and who are referred to telemarketing.** For example, you might want to build a generic call script if your telemarketing agents are responsible for following up with inquiries submitted on the corporate Web site. This can help when defining telemarketing queue assignment rules and conditions.
- **Create your campaign call scripts as you configure your campaign.** If you wait until registrations come in, it can cause telemarketing to delay following up leads promptly.
- **Configure a contact-import test to ensure responses flow to the correct queues.**
- **Brief telemarketing personnel fully on the subject matter before a campaign is launched.** Ensure that followup expectations are clear.

### About the Telemarketing Workflow

Agents in Oracle CRM On Demand Marketing can perform the following activities:

- Select assigned leads to work on.
- Log call attempts and whether the attempt was successful.
- Capture additional information gathered about the prospect by completing a call script Web form.
- Note relevant comments for followup activities.
- Schedule future, followup activities.
- Change the prospect status.
- Qualify or disqualify the prospect.
- Record the disqualification reasons that can be used in future list segmentation.
- Move the prospect to another queue if the prospect was initially assigned incorrectly. The agent must have permission assigned in her user role.
- Transfer the prospect record by moving it to a queue that delivers leads to Sales or a queue that delivers leads to Oracle CRM On Demand.

### Searching in Call Center

Agents use the search feature in call center to find a queue or to look for a prospect using the following criteria:

- Search by Queue Name

- Program name to which a prospect responded
- Company name
- First Name
- Last Name
- Job Title
- Response Date

#### **To search for queues and prospects**

1. Click Activities, then click Call Center.
2. Enter a character string or keyword in one of the search fields.
3. Press Enter.
4. (Optional) To search by response date or last contacted date, do the following:
  - a. Click the Calendar icon.
  - b. To select a date range, click the Calendar icon to specify dates for the From and To fields, or, enter a number of days in the Within Last Days field.
  - c. Click OK.

#### **To display the telemarketing agent workflow**

1. From the Open or Pending Followup screen, select the required prospect.  
The Prospect screen appears.
2. Choose an option to proceed:
  - Call Prospect
  - Qualify, Disqualify
  - Change Queue

## **Calling Prospects**

Oracle CRM On Demand Marketing allows telemarketers to record attempts to contact prospects and the results of calls. If call attempts result in successful conversations, telemarketers can record new information gathered using a call script Web form. Any new information entered or information verified is updated within the prospect record in the Oracle CRM On Demand Marketing contact database immediately. When the call is successful, telemarketers can qualify or disqualify the prospect, change the prospect's lead score, and move the prospect to another queue for distribution to the Sales Department. Prospects can also be marked for future followup or assigned a lead score that automatically makes the prospect eligible, or ineligible, for future nurturing by the Marketing Department.

#### **To call a prospect**

1. Click Call Prospect.  
The Calling Prospect window appears.
2. Select a telephone number that you want to call.  
You can validate this number by selecting a value from Is Number Valid and Is Call Permitted menus.

3. During the call, you can do the following:
  - If required, you can select from the Call Status options, enter notes and set a followup date.
  - To capture data during the call, click Launch Call Script.  
The call script, which is an active Web form, appears in the Calling window. The Calling window can be enlarged or maximized.
  - Capture or verify prepopulated information, using the call script.
4. Click Submit.  
The call script closes saving any information entered.
5. Complete the call status selection.
6. Add notes from the conversation, and schedule a followup date, if needed.  
The following list describes how a prospect status changes in the Calling screen:
  - **Call Back.** It moves the prospect to Call Attempted status.
  - **Call Successful.** It moves the prospect to Contacted status.
  - **No Answer/Busy.** It moves the prospect to Call Attempted status.
  - **Wrong Number.** It moves the prospect to Call Attempted status.
  - **Left a Message.** It moves the prospect to Call Attempted status.  
If you set a followup date with any of the statuses listed previously, this setting also adds the prospect to the Pending Follow-up view.
7. Click Save in the Calling window.  
The Contact window displays the telemarketing status, which is the log of the completed activities.
8. To change where each prospect is assigned for delivery or further nurturing, click Qualify, Disqualify, or Change the Queue.
9. (Optional) If you have scheduled a followup call and want to save your activity and move to another prospect, click Back.

## Qualifying Prospects

When communicating with a prospect you might gather information that enables you to qualify the prospect for delivery to the Sales Department. This change is based on the Lead Scoring rules your team has in place. You can qualify and upgrade the prospect's lead score, and assign the prospect to a different queue.

### To qualify a prospect

1. Select the prospect to work on from the Call Center main list screen.
2. Click Qualify.
3. Upgrade the Prospect Lead Score.
4. Click Queue Lookup to assign the prospect to a delivery queue.
5. Search for and select the appropriate queue from the list of available nontelemarketing queues.
6. Click Add.

7. Add explanatory notes for the Sales Department, and click Confirm.

Oracle CRM On Demand Marketing updates the Telemarketing Activity History section of the prospect screen with the results of your call and score and queue changes.

The prospect moves from the telemarketing queue to the newly assigned queue for delivery to the Sales Department. The prospect is now visible under the Qualified Prospects view in the Call Center pane.

**Tip:** Click the Edit icon (pencil) to edit the followup date and notes sections of the telemarketing activity history.

## Disqualifying Prospects

When communicating with a prospect you might gather information that enables you to disqualify the prospect for delivery to Sales. The disqualification is based on the Lead Scoring rules your team has in place. For example, the prospect might not be interested in the type of solutions your company provides or might not be the correct contact to pursue as he or she might not have purchasing authority or influence. You can disqualify the prospect by selecting any of the custom disqualification reasons established by your team, downgrade the prospect lead score, and add notes, which further explain why the prospect was disqualified.

### To disqualify a prospect

1. Select the prospect to work on from the Call Center main list screen.
2. Click Disqualify.
3. Select a reason for disqualifying the prospect.

You must define disqualification reasons for each Oracle CRM On Demand Marketing customer. Disqualification reasons are unique to each customer.

The following are examples of disqualification reasons:

- Not Interested
- No Budget
- Unable to Reach Prospect
- In Selection Process with Competitive Solutions
- Incorrect data
- Wrong Contact - No Purchase Authority

Disqualification reasons must be customized to your team's specific business practices. Your administrator is responsible for defining the disqualification reasons. For more information, see [Configuring Telemarketing Disqualification Reasons](#).

4. If appropriate, downgrade the prospect lead score.

This step prevents the contact being used for nurture campaigns.

5. Enter comments, if required, and click Confirm.

On the Prospect screen, the Telemarketing Activity History section is updated with the results of your call score, queue changes, and notes. The prospect is removed from the telemarketing queue. The prospect is visible under the Disqualified view in the Call Center pane.

6. Click the Edit icon (pencil) to edit the followup date and notes sections of telemarketing activity history.

## Changing Queues

If a prospect has been incorrectly assigned to a queue, you can reassign the prospect to the appropriate telemarketing agent. Oracle CRM On Demand Marketing allows telemarketing agents to move one prospect at a time to a different queue. However, the agent's role must have the appropriate permissions to do so.

### To change a queue for a single prospect

1. Click Change Queue.  
All available queues are displayed.
2. (Optional) Search by queue name.
3. Select the queues where you want to reassign the prospect.
4. Click Select, then Confirm.

### To change a queue for multiple prospects

1. Select the check boxes beside the prospect names that you want to move.
2. Click Move to Queue.  
A list of available queues appears.
3. Select the required queue, and then click Confirm.

Moving multiple prospects to a different queue is available only from the Open, Call Attempted, Contacted and Pending Follow-up view list screens in the Call Center pane.

If you move prospects from one call center queue to another, prospects retain the same status and are displayed in the corresponding view with the new, associated, queue name. If you move prospects from a call center queue to another, noncall center, queue the prospect is visible under the new queue in the Queues pane in Activities.

## Reviewing Previous Telemarketing Interactions

The Telemarketing Status and Telemarketing Activity History sections of the Prospect Details screen displays the complete history of attempted and successful interactions with a prospect.

You can work on telemarketing queue prospect records until they are either qualified or disqualified. Either of these statuses indicates that the prospect is closed and is either earmarked for the Sales Department or that no further activity is required. Prospects listed in Open, Call Attempted and Pending Follow-up views retain the options for Call Prospect, Qualify, Disqualify, or Change Queue.

When a prospect is qualified or disqualified, the telemarketing activity for that prospect can be partially edited even after it has been captured. For example, you can add any supplementary points to your note.

### To review previous telemarketing interactions

- Click a prospect name in any of the Call Center views and scroll down to display the history.



## Activity Types

When an agent submits a call script form, or saves or confirms a Calling, Qualify or Disqualify window, Oracle CRM On Demand Marketing sets an activity type.

The values for the activity type for telemarketing activity history are slightly different from the values for a status or view.

The activity type values are:

- **Called.** The agent saves information in the Calling window.
- **Call Script Responded.** The agent submits the call script Web form.
- **Qualified.** The agent confirms the qualification activity.
- **Disqualified.** The agent confirms the disqualification activity.
- **Change Queue.** The agent confirms the request to change queue.

You can review the details of each historical interaction by clicking the date and time link. A window displays detailed notes and other changes in that interaction.

### To edit telemarketing activity for a contact

1. Open the call center prospect record that you want to edit.
2. Go to the Telemarketing Activity History section.
3. Click the Edit icon (pencil) to edit the required logged activity.
4. In the window that opens, edit or add notes, and then edit the followup date.

## Displaying Telemarketing Prospect Details

Call center agents want to know all the details about previous prospect interactions so that they can prepare for and engage in an informed, relevant conversation with a prospect. Each prospect that is added to a call center queue and delivered to the call center for followup and qualification brings with it all the detail accumulated in the contact record for that prospect in the Oracle CRM On Demand Marketing Contact database.

By reviewing each section on the Prospect Details screen, call center agents can access the following information:

- Telemarketing activity that has taken place to date for the most recent response by the prospect.
- All known attributes for the demographic and insight information in Oracle CRM On Demand.
- The most recent campaign and program to which the prospect has responded, as well as all prior campaign activity.
- Any Web site activity in which the prospect has engaged.

Agents can also review each campaign activity in detail by clicking the arrow to the left of each activity row. If a prospect passes through the call center more than once because of multiple responses, her status can be determined by opening each recent campaign activity.

If an agent wants to learn if a prospect is already in the telemarketing workflow before contacting the prospect regarding a recent response to a marketing campaign, you can review the Prospect Details screen. You can also open the campaign activity history to see if there are multiple responses to multiple campaigns within a short time.

The status shown for the prospect in each campaign alerts a call center agent if attempts have been made to contact the prospect, or if an agent is currently in conversation with a prospect, or has qualified or disqualified the prospect.

## About the Telemarketing Prospect Statuses

In telemarketing a prospect can have one of the following statuses:

- **Open.** This is the default status when a prospect is assigned to a telemarketing queue. When an attempt is made to contact the prospect, the prospect is moved to another view. Prospects must move out of the Open view quickly.
- **Call Attempted.** An agent has attempted to reach a prospect but is unsuccessful. For example, it might be because of a wrong number or no answer. If a followup date or time is arranged, then a prospect can appear in both the Call Attempted and the Pending Follow-Up views.
- **Contacted.** A contact attempt has been successful and a conversation has taken place. However, the agent has neither qualified nor disqualified the prospect at this time. A prospect can appear in the Contacted view and the Pending Follow-up view simultaneously.
- **Disqualified.** An agent has enough information, either without having a conversation or as the result of a conversation, to disqualify the prospect. The prospect is not sent to the Sales Department and does not appear in any other Call Center view. The prospect can be kept or recontacted for future marketing campaigns.
- **Qualified.** An agent has enough information, either without having a conversation or as the result of a conversation, to qualify the prospect as a lead and determine that the prospect can be sent to the Sales Department. The qualified prospect does not appear in any other Call Center view.

### How a Prospect Changes Status

A prospect can move forward on any of the following paths but can never move backward. A prospect can remain in one status if no further action is taken. A prospect who is disqualified can respond to another offer, enter the call center process again and be qualified.

The following list demonstrates the sequence of status changes:

- Open, Call Attempted, Contacted, Qualified
- Open, Call Attempted, Contacted, Disqualified
- Open, Contacted, Qualified
- Open, Contacted, Disqualified
- Open, Call Attempted, Qualified
- Open, Call Attempted, Disqualified
- Open, Qualified
- Open, Disqualified

### Telemarketing Status for List Segmentation

A *prospect status* is a prospect insights category attribute, which is available for use in target list segmentation. Depending on your defined disqualification reasons, you

might want to contact some disqualified prospects at a future date and reestablish contact with them.

The Marketing and Telemarketing Departments work together to define a list of disqualification reasons customized to their business practices. These disqualification reasons can determine future marketing activities or call campaigns and are set up by administrators. For more information on disqualification, see [Disqualifying Prospects](#).

## Displaying Call Center Reports

Several standard operational reports are available to review and monitor call center and telemarketing activity.

### To display available reports

1. Click the Reports tab.
2. Click Call Center Reports.
3. Select from the following available call center reports:
  - **Call Report for a Telemarketing Agent by Program.** This report allows agents and managers to review a single agent's activities for one or more programs. The report displays program name (or names), activity type, activity date, followup date and prospect data, such as first name, last name, company, job title, and telephone numbers.
  - **Summary by Telemarketing Status and Reason.** You can filter by telemarketing agent, queue or by program name within a defined period. This report enables you to verify the status of all call center prospects assigned, their current status, and confirm if the prospect is disqualified, and learn the disqualification reason. This report gives telemarketing staff, management, and the Marketing Department an overview of up-to-the-minute call center activity.
  - **Call Report for a Program by Telemarketing Agent.** This report allows marketing campaign owners, as well as call center staff, to review the results of calling efforts for responses to a particular program. The report displays telemarketing agent names, activity type, activity date, followup date (if available) and prospect data, such as first name, last name, company, job title, and telephone numbers.
  - **Open Telemarketing Prospects by Age.** This report enables you to check the call center agents' progress following-up assigned prospects by age. You can also check the amount of time prospects remain in the call queue before they are closed because of qualification or disqualification. This report includes any call center prospects who have not yet been qualified or disqualified. You can filter this report by program name or agent and display each prospect's date assigned to the queue, age in days as well as contact information.
  - **Closed Telemarketing Leads.** This report allows call center management or staff to review the results of calling efforts that have resulted in closed leads, including those qualified or disqualified. This report displays program names, telemarketing agent names, current status, close reason (if disqualified), new queue assignment, activity type, activity date, followup date (if available). It also displays prospect data, such as first name, last name, company, job title, and telephone numbers.

## About Email Opt Outs

There are two attributes recommended by Oracle CRM On Demand Marketing to capture email opt-out information:

- Email Permitted
- Global Email Opt Out

### Email Permitted

If a contact unsubscribes to a program through a third-party email distribution vendor's Unsubscribe link, that information is reported back to Oracle CRM On Demand Marketing and the Is Email Permitted field is set to No.

Contacts who opt out from email communications are automatically added to the Oracle CRM On Demand Marketing global opt out table. Also, any record with that unique email address no longer receives future emails.

You can change the Is Email Permitted field to No by manually editing a contact record or by performing a contact import. To change a contact record who opted out but wants to revert to an opt in status, you must make this change through a manual edit to the contact record.

A contact who decides to unsubscribe through an email distribution vendor; that is, the Is Email Permitted field is set to No, but then the Is Email Permitted field is manually changed to Yes (or 1), the update is automatically forwarded to the email distribution vendor so the contact is resubscribed. The Is Email Permitted field must be reserved only for contacts who want to be listed by third-party email distribution vendors. This request update job runs once every hour.

### Global Email Opt Out

You can set up an attribute within Oracle CRM On Demand Marketing for Global Email Opt Out to capture Unsubscribes from an Opt Out or Subscriptions Web form hosted on your Web site. Always include an Opt Out or Subscribe/Unsubscribe one-click link in all outbound email messages. Always provide a single-click Opt Out option in all your email correspondence. This is a requirement of the CAN SPAM Act of 2003.

### Contact Opt Out

A contact can opt out of receiving email in the following ways:

- Contacts can request to unsubscribe from email communication. This request is captured by an email distribution vendor and is automatically flagged in the Oracle CRM On Demand Marketing contact record in the Is Email Permitted field.
- Contact submits a Web form indicating an opt-out request.
- Opt-out requests received by Oracle CRM On Demand can be synchronized and updated in Oracle CRM On Demand Marketing.
- Opt-out requests received in another manner, for example, in an email, can be processed by:
  - Editing the contact record (by an administrator) to flag the contact as opt out.
  - Importing opt-out requests, and setting the Opt out flag in multiple contact records.

Whenever an opt out request is received and flagged in a contact record, the email address is added to a master opt out table within Oracle CRM On Demand Marketing.

This data ensures that any existing contact records or any new records created, which include that unique email address, are automatically flagged as opt-out candidates.

You can display contacts who have requested to opt out of email communications, so you can monitor opt-out requests as they are submitted. You can also export a CSV list of opt-out requests on this screen.

When a contact record has requested to opt out of receiving email communication, there are two ways in which the contact can decide to opt in:

- The contact submits a Web form requesting to be included in email communications in the future.
- An administrator manually edits a contact record in response to an explicit request from the contact to be opted in for future email communications.

Contact records with an Opt Out flag cannot be changed to Opt In through a list import by Oracle CRM On Demand to ensure that the most current permission request is active and cannot be mistakenly overwritten.



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# Using Reports

This chapter covers the reports available in Oracle CRM On Demand Marketing. It includes the following topics:

- [Operational Reports](#)
- [About the Report Tab](#)
- [Operational Report Types](#)

## Operational Reports

The following reports are types of operational reports in Oracle CRM On Demand Marketing:

- [Email Performance Reports](#)
- [Email Detail Reports](#)
- [Registration Reports](#)
- [Queue Reports](#)
- [Configuration Reports](#)
- [Campaign Automation Reports](#)
- [Campaign ROI Reports](#)
- [Call Center Reports](#)
- [Operational Usage Reports](#)
- [Contact Import Reports](#)
- [Website Activity Reports](#)

### Generating a Report

This topic describes how to generate a report.

#### To generate a report

1. Click the Reports tab, and then click the required report.
2. Select search criteria, for example, program or campaign name, program or campaign code, and so on.
3. Click Run Report to generate the report.

The generated report appears. You can sort the report results in ascending alphabetical order by clicking the column header once, click the column header

twice for descending alphabetical order. The report is normally displayed in HTML. However, you can display the report in other formats, such as PDF, CSV, and Excel.

### Email Performance Reports

The following reports are available:

- **Email Statistics.** This report provides a breakdown of the key email metrics tracked for programs configured with outbound communication. It also allows the Marketing Department to display the metrics by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.
- **Email Bounceback.** This report provides detailed reasons why delivered emails display error messages. The breakdown numbers can be displayed by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.
- **Email Unsubscribe.** This report lists all contacts who have unsubscribed from all email communications. The breakdown numbers can be displayed by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.
- **Email Clickthrough.** This report lists all marketing contacts who clicked one or more links within email campaigns. The report also shows clickthrough counts by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.
- **Email Summary By Domain.** This report displays the email summary by email domain.

### Email Detail Reports

The following reports are available:

- **Email Bounceback by Contact.** This report lists all marketing contacts whose email addresses displayed error messages and failed when targeted for different email programs. The report also lists reason codes that explain the delivery failure.
- **Email Unsubscribe by Contact.** This report lists all marketing contacts who unsubscribed from future email communications. The report also shows unsubscribe information by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.
- **Email Clickthrough by Contact.** This report lists all marketing contacts who clicked one or more links within an email message. The report also shows the clickthrough information by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### Registration Reports

The following reports are available:

- **Summary of Program Registration.** This report displays the program registration summary.
- **Registration Profile by Attribute.** This report lists all responses by attribute and question presented to the prospect on the landing page. For example, this report informs you how many respondents are from United States of America and how



many are from Canada. The report also enables you to measure how many registrations are from new contacts and how many registrations are from repeat visitors.

- **Registration Statistics by Score.** This report lists all responses by program and grouped by scoring tiers. For example, this report informs you how many respondents from a certain program are scored as A leads and how many are scored as B leads.
- **Attendee Roster.** The report lists all contacts who registered for a program. This report can be used to manually track attendance, add attendance status, and import the data back into Oracle CRM On Demand Marketing.
- **Lead Funnel.** This reports displays statistical information for a specific program.
- **Program Registrant Profile.** This report displays all question and answers given in the registration process, including standard-demographic fields. The values for the First Name, Last Name, Email, and Company fields come from the contact's record, all other fields in the report come from registration data.

### Queue Reports

The following reports are available:

- **Queue Assignment Summary.** This report lists all responses assigned to a specific queue and grouped by scoring tiers. For example, this report informs you how many respondents assigned to a specific queue are scored as A leads and how many are scored as B leads.
- **Queue Assignment by Campaign.** This report lists all responses assigned to a specific queue and grouped by campaign.
- **Queue Assignment by Program.** This report lists all responses assigned to a specific queue and grouped by program.
- **Queue Assignment by Status.** This report lists all responses assigned to a specific queue and grouped by status. For example, this report informs you how many respondents assigned to a specific queue are published to Oracle CRM On Demand or, are sent as a CSV attachment by email.
- **Queue Assignment Detail.** This report is an aggregation of the three following reports:
  - Queue Assignment by Campaign Report
  - Queue Assignment by Program Report
  - Queue Assignment by Status Report

### Configuration Reports

The following report is available:

- **Program Configuration.** This report displays configuration details for all programs.

### Campaign Automation Reports

The following reports are available:

- **Campaign Automation Details.** This report displays the latest activity details for nurturing a contact.
- **Campaign Automation Activity Details.** This report displays all activities for nurturing a contact.

- **Campaign Automation Email Statistics.** This report displays the email statistics for automated campaigns.
- **Campaign Automation Email Bounceback.** This report provides detailed reasons why delivered emails display error messages. The breakdown numbers can be displayed by invitation types, such as Initial Invitation, Repeat Invitations, and Reminder Invitations for Programs, such as Webinars, events, and trade shows.
- **Campaign Automation Email Unsubscribe.** This report provides the number of contacts who have unsubscribed from all email communications. The breakdown numbers can be displayed by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.
- **Campaign Automation Email Clickthrough.** This report lists all marketing contacts who clicked one or more links within email campaigns. The report also shows clickthrough counts by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### Campaign ROI Reports

The following reports are available:

- **Campaign Summary.** This report displays operational metrics for campaign attributes, such as cost, target quantity, response rate, lead-conversion rate, and so on.
- **Program Summary.** This report displays operational metrics for programs, such as cost, target quantity, response rate, lead-conversion rate, and so on.

### Call Center Reports

The following reports are available:

- **Call Report for a Telemarketing Agent by Program.** This report allows agents and managers to review a single agent's activities for one or more programs. The report displays program names, activity type, activity date, followup date, and prospect data, such as first name, last name, company, job title, and telephone number.
- **Summary by Telemarketing Status and Reason.** This report enables you to filter by telemarketing agent, by queue or by program name within a defined period to check the status of all call center prospects assigned. For example, you can check their current status, and if disqualified, learn the disqualification reason. This report allows telemarketing staff, management and marketing staff to display an overview of the up-to-the-minute call center activity.
- **Call Report for a Program by Telemarketing Agent.** This report allows marketing campaign owners as well as call center staff to review the results of the calling efforts for responses to a particular program. The report displays telemarketing agent names, activity type, activity date, followup date (if available), and prospect data, such as first name, last name, company, job title, and telephone numbers.
- **Open Telemarketing Prospects by Age.** This report enables you to check the progress call center agents are making in following-up with assigned prospects by age, or the amount of time prospects remain in the call queue. It includes any call center prospects who have not yet been qualified or disqualified. You can filter by program name or agent and display each prospect's date assigned to the queue, the age in days, as well as contact information.

- **Closed Telemarketing Leads.** This report allows call center management or staff to review the results of calling efforts which have resulted in closed leads, including those qualified or disqualified. The report displays program names, telemarketing agent names, current status, close reason (if disqualified), new queue assignment, activity type, activity date, followup date (if available) and prospect data, such as first name, last name, company, job title, and telephone numbers.

### **Operational Usage Reports**

The following reports are available:

- **Summary of Registrations by Program.** This report displays the list of registered contacts for every program.
- **Summary of Emails by Program.** This report displays total emails for every program.
- **Usage Summary.** This report displays the usage summary for Oracle CRM On Demand Marketing.
- **Available Usage Volume.** This report displays the quantity of emails, contacts, and users your organization has subscribed, and how many of each are remaining.

### **Contact Import Reports**

The following reports are available:

- **Scoring and Lead Assignment Details for Imported Registrations.** This report displays the scoring and queue assignment Details for all imported registrations in Oracle CRM On Demand Marketing.
- **Queue Assignment Summary by Contact Imports.** This report displays the queue assignment summary classified for imported contacts in Oracle CRM On Demand Marketing.

### **Website Activity Reports**

The following reports are available:

- **Summary of Website Activities.** This report displays the Web site visits that occurred during the specified period. It is not a real-time report. The data captured in the previous hour might not be displayed in this report.
- **Website Activity Details.** This report displays the number of Web page views that occurred during the specified period. It is not a real-time report. The data captured in the previous hour might not be displayed in this report.

## **About the Report Tab**

The Reports tab contains the Oracle CRM On Demand Marketing Operational Reports. These reports are organized into the following categories:

- [Email Performance Reports](#)
- [Email Detail Reports](#)
- [Registration Reports](#)
- [Queue Reports](#)
- [Configuration Reports](#)
- [Campaign Automation Reports](#)

- [Campaign ROI Reports](#)
- [Call Center Reports](#)
- [Operational Usage Reports](#)
- [Contact Import Reports](#)
- [Website Activity Reports](#)

## Operational Report Types

The following reports are types of operational reports in Oracle CRM On Demand Marketing:

- [Email Performance Reports](#)
- [Email Detail Reports](#)
- [Registration Reports](#)
- [Queue Reports](#)
- [Configuration Reports](#)
- [Campaign Automation Reports](#)
- [Campaign ROI Reports](#)
- [Call Center Reports](#)
- [Operational Usage Reports](#)
- [Contact Import Reports](#)
- [Website Activity Reports](#)

### Email Statistics Report

This report provides a detailed description of the key email metrics tracked for programs with outbound communication configured. It also allows the Marketing Department to display the metrics by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### Email Bounceback Report

This report provides detailed reasons why delivered emails display error messages. The breakdown numbers can be displayed by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### Email Unsubscribe Report

This report provides a detailed description of all contacts who have unsubscribed from all email communications. The breakdown numbers can be displayed by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### Email Clickthrough Report

This report provides a detailed description of all marketing contacts who clicked one or more links within email campaigns. The report also shows the clickthrough counts

by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### **Email Summary by Domain Report**

This report provides a summary of the email description by email domain.

### **Email Bounce by Contact Report**

This report lists the marketing contacts whose email addresses displayed error messages or failed to deliver, when targeted for different email programs. The report also lists distinct reason codes that caused the failure.

### **Email Unsubscribe by Contact Report**

This report lists all marketing contacts who unsubscribed from future email communications. The report also shows unsubscribe information by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### **Email Clickthrough by Contact Report**

This report lists marketing contacts who clicked one or more links within an email message. The report also shows the clickthrough information by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

### **Program Registration Report**

This report displays the program registration summary.

### **Program Registrations and Attendance Report**

This report displays the summary of visitors, registrations, attendance and downloads by a program for a given period.

### **Registration Profile by Attribute Report**

This report gives an overview of the responses by attribute and questions presented to the prospect on the landing page. For example, this report informs you how many respondents are from the United States of America and how many are from Canada. The report also enables you to measure how many registrations are from new contacts and how many registrations are from repeat visitors.

### **Registration Statistics by Score Report**

This report gives an overview of the all responses by program and grouped by scoring tiers. For example, this report informs you how many respondents from a certain program are scored as A leads and how many are scored as B leads.

### **Attendee Roster Report**

The report lists contacts who registered for a program. This report can be used to manually track attendance, add attendance status, and import back into Oracle CRM On Demand Marketing.

## Lead Funnel Report

The lead funnel report displays statistical information about program response in a graphical format. It consists of the following sections:

- **Lead Funnel.** A bar chart that shows counts across different stages of funnel; that is, invitations, clickthroughs, registrations, filtering, and qualification.
- **Responses - Prospect Company Distribution.** Shows response count by companies.
- **Filtering Metrics.** Shows a breakdown of responses by different criteria.
- **Data Correction Metrics.** Show the number of records that failed data-quality checks.
- **Qualification - Lead Scoring Statistics.** Shows counts by scores.

## Program Registrant Profile Report

This report displays questions and answers given in the registration process, including standard demographic fields. The values for the First Name, Last Name, Email, and Company fields come from the contact's record, all other fields in the report come from registration data.

## Queue Assign Summary Report

This report gives an overview of the responses assigned to a specific queue and grouped by scoring tiers. For example, this report informs you how many respondents assigned to a specific queue are scored as A leads and how many are scored as B leads.

## Queue Assignment by Campaign Report

This report gives an overview of the responses assigned to a specific queue and grouped by campaign.

## Queue Assignment by Program Report

This report gives an overview of the responses assigned to a specific queue and grouped by program.

## Queue Assignment by Status Report

This report gives an overview of the responses assigned to a specific queue and grouped by status. For example, this report informs you how many respondents assigned to a specific queue are published to Oracle CRM On Demand, or, are sent as a CSV attachment by email.

## Queue Assignment Detail Report

This report is an aggregation of the following three reports:

- Queue Assignment by Campaign Report
- Queue Assignment by Program Report
- Queue Assignment by Status Report

## **Program Configuration Report**

This report displays the configuration details for programs in Oracle CRM On Demand Marketing.

## **Campaign Automation Summary Report**

This report provides an overview of the contacts who qualified for an automated campaign and their progression within the automated flow. The contact states that are tracked include: entry count, exit count, switch count, and so on.

## **Campaign Switch Summary Report**

This report is a summary of the switched contacts with old and new campaign names.

## **Automation Statistics by Program Report**

This report is a summary of contacts targeted, registered, and scored by program.

## **Invitations by Program Report**

This report lists the number of contacts targeted during the launch of the automation process that has been executed.

## **Traversed Path by Campaign Report**

This report lists the different paths that contacts crossed within the automated campaign. The Marketing Department can measure nurture paths, identify the most effective ones, and refine the programs that do not provide an adequate yield.

## **Campaign Automation Details Report**

This report displays the latest activity details for nurturing a contact.

## **Campaign Automation Activity Details Report**

This report displays all activities for nurturing a contact.

## **Campaign Automation Email Statistics Report**

This report displays the email statistics for automated campaigns.

## **Campaign Automation Email Bounceback Report**

This report provides the detailed reasons why delivered emails display error messages or fail to deliver. The breakdown numbers can be viewed by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

## **Campaign Automation Email Unsubscribe Report**

This report provides the number of contacts who have unsubscribed from all email communications. The breakdown numbers can be displayed by invitation types, such as initial invitation, repeat invitation, and reminder invitations for programs, such as Webinars, events, and trade shows.

## Campaign Automation Email Clickthrough Report

This report gives the number of marketing contacts who clicked one or more links within email campaigns. The report also shows clickthrough counts by invitation types, such as initial invitation, repeat invitations, and reminder invitations for programs, such as Webinars, events, and trade shows.

## Campaign Summary Report

This report displays the operational metrics for campaign attributes including cost, target quantity, response rate, and lead-conversion rate. The following table provides information on the columns and their meanings.

Column Name	Description
Estimated Budget	This is the sum of the budget values of all line items.
Actual Cost	This is the sum of the actual cost values of all line items.
Target Quantity	The count of the targeted contacts. This is aggregated at the campaign level.
Visitors	The click-through (visited) count for the campaign. This is aggregated at the campaign level.
Registered	The registered count. This is aggregated at the campaign level.
Attended	The attended count. This is aggregated at the campaign level.
Downloaded	The offer downloaded count. This is aggregated at the campaign level.
Total Rejected	The count of registrations that were filtered due to rejection rules. This is aggregated at the campaign level.
Total Cleansed	The count of registrations that were filtered due to suppression rules. This is aggregated at the campaign level.
Total Score A	The count of prospects with a Score Grade of A. This is aggregated at the campaign level.
Total Score B	The count of prospects with a Score Grade of B. This is aggregated at the campaign level.
Total Score C	The count of prospects with a Score Grade of C. This is aggregated at the campaign level.
Total Score D	The count of prospects with a Score Grade of D. This is aggregated at the campaign level.
Total Score E	The count of prospects with a Score Grade of E. This is aggregated at the campaign level.

## Program Summary Report

This report displays operational metrics for programs including cost, target quantity, response rate, and lead-conversion rate. The following table provides information on the columns and their meanings.

Column Name	Description
Estimated Budget	This is the sum of the budget values of all line items.
Actual Cost	This is the sum of the actual cost values of all line items.
Final Drop Quantity	This is the program production list count. This is aggregated at the program level.



Column Name	Description
Target Quantity	The count of the targeted contacts. This is aggregated at the program level.
Visitors	The click-through (visited) count for the campaign. This is aggregated at the program level.
Registered	The registered count. This is aggregated at the program level.
Attended	The attended count. This is aggregated at the program level.
Downloaded	The offer downloaded count. This is aggregated at the program level.
Total Rejected	The count of registrations that were filtered due to rejection rules. This is aggregated at the program level.
Total Cleansed	The count of registrations that were filtered due to suppression rules. This is aggregated at the program level.
Total Score A	The count of prospects with a Score Grade of A. This is aggregated at the program level.
Total Score B	The count of prospects with a Score Grade of B. This is aggregated at the program level.
Total Score C	The count of prospects with a Score Grade of C. This is aggregated at the program level.
Total Score D	The count of prospects with a Score Grade of D. This is aggregated at the program level.

## Telemarketing Agent by Program Report

This report allows agents and managers to review a single agent's activities for one of more programs. The report displays program names, activity type, activity date, followup date, and prospect data, such as first name, last name, company, job title, and telephone numbers.

## Summary by Status and Reason Report

This report enables you to filter by telemarketing agent, by queue, or by program name within a defined period to check the status of call center prospects assigned, their current status, and if disqualified, learn the disqualification reason. This report allows telemarketing staff, management and the Marketing Department to display an overview of the current call center activity.

## Program by Agent Report

This report allows marketing campaign owners, as well as call center staff, to review the results of calling efforts for responses to a particular program. The report displays telemarketing agent names, activity type, activity date, followup date (if available), and prospect data, such as first name, last name, company, job title, and telephone numbers.

## Open Prospects by Age Report

This report enables you to check how call center agents are progressing in following-up with assigned prospects according to the prospects' age. It also enables you to check how long prospects remain in the call queue before they are closed because of qualification or disqualification. This report includes any call center prospects who are neither qualified nor disqualified. You can filter by program name

or agent and display each prospect's date assigned to the queue, age in days as well as contact information.

## **Closed Telemarketing Leads Report**

This report allows call center management or staff to review the results of calling efforts that have resulted in closed leads, including those that are qualified or disqualified. The report displays program names, telemarketing agent names, current status, close reason (if disqualified), new queue assignment, activity type, activity date, followup date (if available), and prospect data, such as first name, last name, company, job title, and telephone numbers.

## **Summary of Registrations by Program Report**

This report displays the list of registered contacts for every program.

## **Summary of Emails by Program Report**

This report displays total emails for every program.

## **Usage Summary Report**

This report displays a usage summary for Oracle CRM On Demand Marketing.

## **Available Usage Volume Report**

This report displays the quantity of emails, contacts, and users your organization has subscribed, and how many of each are remaining. Test emails are not included in the report.

## **Scoring and Queue Assignment Details for the Imported Registrations Report**

This reports provides information on the scoring and queue assignment details for imported registrations.

## **Queue Assignment Summary by Contact Imports Report**

This report provides information on the queue assignment. It is filtered by contact imports.

## **Summary of Website Activities Report**

This report displays the Web site visits that occurred during the specified period. It is not a real-time report. The data captured in the previous hour might not be displayed in this report.

## **Website Activity Details Report**

This report displays the number of Web page views that occurred during the specified period. It is not a real-time report. The data captured in the previous hour might not be displayed in this report.

## **Generating Operational Reports**

This procedure explains how to generate any of the Oracle CRM On Demand Marketing standard real-time operational reports.

**To generate an operational report**

1. Click the Reports tab.
2. Find the report, and click the report name that you want to generate.
3. To define the search criteria, do one or all of the following:
  - Enter keywords in the text entry boxes for the campaign or program name, and press Enter.
  - Click the magnifying glass icon to open the lookup tables for campaigns and programs.
  - Select a date range or program type.

Depending on the report that you want to generate, the available search criteria varies.

4. Click Run Report to generate the report.

The report results are displayed. To sort report results, click any column header for ascending alphabetical order, and twice for descending alphabetically order.

**Exporting Results**

You can export a report into files of CSV, Excel, or PDF formats.

**To export report results**

1. Generate the required report.
2. Click one of the following buttons:
  - Export PDF
  - Export Excel
  - Export CSV
3. Do one of the following:
  - Open the PDF, Excel or CSV file.
  - Save the PDF, Excel or CSV file to your computer.

Report headers with filter criteria listed are included in the export file. In CSV and Excel file formats, the header information is located at the bottom of the file. In PDF format, the header information is located at the top of the file.



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# Configuring and Administering Oracle CRM On Demand Marketing

This chapter describes how to configure and administer Oracle CRM On Demand Marketing. It includes the following topics:

- [Using the Admin Page](#)
- [Configuring Campaign Management Options](#)
- [Configuring Registration Management Options](#)
- [Configuring Lead Management Options](#)
- [About Contact Management](#)
- [Configuring Web Site Tracking Management Options](#)
- [About Job Reports](#)
- [Configuring Security Management Options](#)
- [Configuring Email Management Options](#)
- [Configuring Field Management Options](#)
- [Configuring CRM Integration Management Options](#)
- [About Synchronizing and Publishing Data](#)
- [Using Custom Objects](#)
- [Configuring My Setup Options](#)

## Using the Admin Page

You can configure and customize Oracle CRM On Demand Marketing from the Admin page.

### Accessing the Admin Page

Use the following procedure to access the Admin page.

#### To access the Admin page

- Click the Admin link in the upper-right corner of the screen.

The following Admin functions are available:

- **Campaign Management.** For more information, see [Configuring Campaign Management Options](#).

- **Registration Management.** For more information, see [Configuring Registration Management Options](#).
- **Lead Management.** For more information, see [Configuring Lead Management Options](#).
- **Contact Management.** For more information, see [About Contact Management](#).
- **Web Site Management.** For more information, see [Configuring Web Site Tracking Management Options](#).
- **Job Reports.** For more information, see [About Job Reports](#).
- **Security Management.** For more information, see [Configuring Security Management Options](#).
- **Email Management.** For more information, see [Configuring Email Management Options](#).
- **Custom Fields.** For more information, see [Configuring Field Management Options](#).
- **CRM Integration Management.** For more information, see [Configuring CRM Integration Management Options](#).

## Configuring Campaign Management Options

Configure the following campaign components:

- **Program Types.** For more information, see [Configuring Program Types](#).
- **Offer Types.** For more information, see [Configuring Offer Types](#).
- **Telemarketing Disqualification Reasons.** For more information, see [Configuring Telemarketing Disqualification Reasons](#).

## Configuring Program Types

You can add new program types, remove program types, and edit existing program types. Use the program types page to do the following:

- Define custom program types.
- Associate program types.
- Analyze how many programs of a specific type were executed and how many leads were generated.

### Editing Program Types

To edit a program type, use the following procedure.

#### To edit a program type

1. Click Admin in the upper-right corner of the screen.
2. In the Campaign Management section, click Program Types.
3. Search for the program type, if necessary.
4. Click the Edit (pencil) icon corresponding to the program type.
5. Make your edits, and then click Save.

## Deleting Program Types

To delete a program type, use the following procedure.

### To delete a program type

1. Click Admin in the upper-right corner of the screen.
2. In the Campaign Management section, click Program Types.
3. Search for the program type, if necessary.
4. Click the Delete icon (X) corresponding to the program type.

The Program Type is deleted. A deletion confirmation is not requested.

## Creating Program Types

To create a program type, use the following procedure.

### To create a program type

1. Click Admin in the upper-right corner of the screen.
2. In the Campaign Management section, click Program Types.
3. Click New Custom Program Type.
4. Enter a Program Type name and description, and then click Save.

## Configuring Offer Types

You can add new offer types, remove offer types, and edit existing offer types. Use the offer types page to:

- Define custom offer types.
- Associate offer types when a new offer is created.
- Analyze how many programs included offers of a specific type and how many leads were generated.

## Editing Offer Types

To edit an offer type, use the following procedure.

### To edit a offer type

1. Search for the offer type, if necessary.
2. Click the Edit (pencil) icon corresponding to the offer type.
3. Make your edits, and then click Save.

## Deleting Offer Types

To delete an offer type, use the following procedure.

### To delete an offer type

1. Search for the offer type, if necessary.
2. Click the Delete button corresponding to the offer type.

The offer type is deleted. A deletion confirmation is not requested.

## Creating Offer Types

To create an offer type, use the following procedure.

### To create an offer type

1. Click New Offer Type.
2. Enter an offer type name and description.  
The Offer Type Code is entered automatically.
3. Click Save.

## Offer Fulfillment Types

The following table provides detailed information on the offer fulfillment type options.

Offer Fulfillment Type	Description
Single click Download	<p>Oracle CRM On Demand Marketing automatically tracks offer downloads. This information is then available for segmenting future target lists. Most business-to-business electronic offer types (white papers, case studies, even events) can be created as single-click, offer fulfillment types that can be downloaded. Offer attribute tags, such as Offer Name, Offer Description, and others might not display properly on the program Thank You and Returning User pages if the offer fulfillment type is not configured correctly.</p> <p>Select Single Click Download for downloadable electronic documents (PDF, doc, and so on) and trial versions of software. Oracle CRM On Demand Marketing tracks these offer downloads.</p>
Subscription	This type tracks newsletters. Select Subscription for offers that prospects and customers subscribe to, such as newsletters or news releases.
Registration only	This type tracks offers, such as Webinars or events. Registration only is the most common fulfillment type. Use Registration only in cases where you do not want Oracle CRM On Demand Marketing to handle offer provisioning. For example, offers sent by direct mail or documents hosted on external sites.
Pass Through	This type tracks offers where registration and fulfillment are completed outside Oracle CRM On Demand Marketing. Select Pass Through when you do not want Oracle CRM On Demand Marketing to take any action related to offer fulfillment.

## Configuring Registration Management Options

Configure the following registration management components:

- **Global Registration Rules.** For more information, see [Configuring Global Registration Rules](#).
- **Phone and Postal Validations.** For more information, see [Configuring Phone and Postal Validations](#).
- **Inbound Registration Filter.** For more information, see [Configuring the Inbound Registration Filter](#).
- **Deduping Rules.** For more information, see [Configuring Deduplication Rules](#).
- **Attribute Configuration.** For more information, see [Configuring Attributes](#).
- **Personalized Id Configuration.** For more information, see [Configuring Personalized ID](#).



- **Cookie Consent Configuration.** For more information, see [Configuring Cookie Consent](#).

## Configuring Global Registration Rules

*Global registration rules* provide functionality to enforce or skip program registration based on a contact's previous activity. Global registration rules apply to all programs and all contacts. The Time-Based Registration Rule configured for a campaign takes precedence over the Global Rule. The Is Registration Mandatory flag, which can be set during the configuration of a program's inbound registration flow, takes precedence over the campaign-level Time-based Registration Rule and the Global Registration Rule.

For example, the Global Time based Registration Rule is set to 4 days. A contact has registered for a program within the past 4 days. When the contact registers for another program within the 4-day period he is taken to the Thank You page, skipping the registration process for the second program. You can enable or disable time-based global registration rules.

### To enable global registration rules

1. Click Admin in the upper-right corner of the screen.
2. In the Registration Management section, click Global Registration Rules.  
The Global Registration Rules screen appears.
3. Click the check box to Enable Global Time-Based Registration Rule and fill in the period you want to define for the rule, and then click Save.

The flag, Is Registration Mandatory, at the program level has a higher priority than the Global Time Based Registration Rule. For programs that have the Is Registration Mandatory flag enabled, the time-based registration rules are overruled and contacts are always asked to register.

### Campaign Time-Based Registration Rule

When you configure the campaign time-based registration rule for a particular campaign, and if a contact registers once for any program in the campaign, then the registration is skipped for the remaining programs under the same campaign. For example, a contact responds to a program in a particular campaign. The time based registration rule is set to 4 days in that campaign. If the same contact registers for another program from the same campaign within the 4-day period, the contact's registration is automatically updated, and he is taken to the program's Thank You page. The contact's Activity History captures registrations for both programs.

### Microsite Time-Based Registration Rule

When you configure the Time-based registration Rule for a particular microsite, if a contact is already registered for an offer in the microsite, registration is skipped for the remaining offers in the microsite. For example, a contact registers for and downloads an offer from a particular microsite. The microsite time-based registration rule is set to 4 days. If the same contact registers for another offer from the same microsite within 4 days, the contact does not register again, instead the contact is presented with the offer.

### Topic Time-Based Registration Rule

When you configure the Time-based Registration Rule for a particular topic, if a contact has already registered for a program in the same topic, registration is skipped for the remaining programs in the topic. For example, a contact is registered for a

program in a topic and the time-based registration rule is enabled and set to 4-days. When the same contact clicks a link to register for another offer in the same topic, the registration page is skipped.

## Configuring Phone and Postal Validations

Oracle CRM On Demand Marketing provides prebuilt validations for phone and postal code data types captured during the Web form registration process. You can activate validation for these data types when you define question types in the Web form question options screen. The following phone validations are predefined:

- **France.** 1234567890, 12 12 12 12 12, 12-12-12-12-12, +33 (0) 123456789
- **Germany.** (1234) 1234-1234, (1234)/1234-1234, 1234 1234 1234, 1234 / 1234 1234, 1234 / 1234-1234, +49 12 12345678, 123 12345678
- **United Kingdom.** (123)1234567, 1234567890, (123)123456, 123456789, +44 (0) 1234 123456, 12345 123456
- **United States of America.** (123) 123-1234, 123-123-1234, 1234567890

### To enable phone and postal validation

- From the country option list, select the country answer code.

You can turn on these validations for a country by mapping the standard country name to the country answer code configured for your account. You can also disable the validations for a country by unmapping the respective country answer code.

The Phone Format Available and Postal Formats Available columns indicate whether the respective validations are currently supported for a particular country. With the phone and postal code validation, you can choose the phone and postal codes used in specific countries for registration. When the validations are enabled, they can be applied to Web form questions during the Web form design in the Question Options screen.

### To apply external validations to Web form question

1. Navigate to the Rules screen.
  - a. If you are viewing the Question Options step during Web form design, click Edit Rules for the phone or postal code question.
  - b. If you are viewing the Rules screen, scroll down to External Validations, and click New Rule.
2. Select the appropriate option from the External Validator list, and click Save.

## Configuring the Inbound Registration Filter

When a survey or Web form is completed by a contact with a particular email address or company name that is defined in the Inbound Registration filter, the contact is redirected to another page when the Submit button is clicked. The contact is not allowed to register for that particular program.

Create a spreadsheet (comma separated values) or text file listing all the email domain or company name values that you want the filter to capture. To enable testing of the filter, include a fictitious company name or email domain in your file. Then, when the filter is configured, attempt to complete a registration form using fictitious information.

**To configure an inbound registration filter**

1. Click Admin in the upper-right corner of the screen.
2. From the Registration Management section, click Inbound Registration Filter.
3. Click the check boxes for the options to Enable the Filter and to apply to either Email Domain, Company Name, or both.
4. Enter the Filter Redirect URL.

You can create a Web page that explains that the user is not allowed to register.

5. Search for the registration filter file on your local drive.
6. Upload a file by opening the file.

Only CSV and TXT files are supported and must conform to the following requirements:

- Each registration filter import file can contain either an email domain or company name.
  - The import file must be a single column
  - A column header is not necessary
7. When finished, click Save.

**Configuring Deduplication Rules**

Deduplication rules are configured to detect duplicate records during data import and contact creation. Some examples are: manual contact record creation, Web form submissions, or during contact imports. First, create the rules and then arrange them in order of preferred sequence. Oracle CRM On Demand Marketing matches the new contact entry against any contact already in the database by matching each rule in the sequential order defined. Whenever a match is identified for any rule, Oracle CRM On Demand Marketing marks the record as a duplicate record. Rather than creating a new record, the existing record is updated with the latest information according to the merge rules defined in the import configuration or by default if the field is blank.

**How Data Deduplication Works**

This topic describes how data deduplication works:

- Oracle CRM On Demand Marketing is designed to enforce a search before create paradigm.
- Before creating a new record, Oracle CRM On Demand Marketing checks for an existing record based on the rules defined. If a matching record is found, Oracle CRM On Demand Marketing updates the existing record. If no records match, it creates a new record.
- You can define deduplication rules for each entity and also define the order of precedence for the rules.
- Indicate whether uppercase and lowercase character-sensitivity is required in the deduplication rule by selecting the Ignore Case check box if case is not required, or leaving it blank if case is required.

**To configure deduplication rules**

1. Click Admin in the upper-right corner of the screen.
2. In the Registration Management section, click Deduping Rules.

3. Click Add.
4. Select the check boxes next to the attributes upon which to base the new rule, and click the arrow to add them to the right hand column.
5. Indicate whether the rule matches case or ignores case, and click Save.
6. Arrange the rules in order, by clicking Sequence.
7. Select the rule that you want to reposition, then click the up arrow or down arrow.
8. To apply dedupe rules to Web form submission click the related check box.

Oracle CRM On Demand Marketing displays all attribute fields that can be used to create a new rule. For existing rules, no editing is provided. They can be deleted by clicking the Delete icon in the Existing Rules section.

## Configuring Attributes

Configuring attributes sets a default mode for all new attributes.

Attributes can have both a list of answers and a list of answer codes. The answer codes are stored in the database and are language-independent. If you enable the use of answer codes, then the list of answers does not have to be the same as the list of answer codes. You can use one answer code to correspond to multiple answers.

For example, in a list of job titles your list of answers can include IT Manager, Marketing Manager, and Operations Manager. In your answer codes, all three of those answers can map to the single answer code of Manager.

Oracle CRM On Demand Marketing has two options:

- **Enable Answer Codes.** Enables you to manage a set of answer codes separately from answers. You can create values for answers and answer codes, which are different.
- **Do Not Enable Answer Codes.** Answer codes are always duplicates of answer values.

To standardize answer values for questions asked in Web forms, you must have separate answer code management. This requirement also applies if you want to have the flexibility to list answer options in foreign languages.

You can decide to enable managed answer codes when each attribute is created rather than as a global setting. However, if you find that you create attributes where you require answer values and answer codes that are different, you can enable this option (Enable Answer Codes) globally.

### To create managed answer codes

1. Click Admin in the upper-right corner of the screen.
2. In the Registration Management section, click Attribute Configuration.
3. Click the check box to Enable Answer Codes, and then click Save.

You can overwrite the managed answer code option at any time while creating attributes.

## Configuring Personalized ID

This feature enables contacts to register for marketing programs and microsites by using a personalized ID (PID), which contains their first and last name rather than appending the contact ID and email address as parameters to the program pretty URL.

Providing configurable personalized IDs allows marketers to create personalized pretty URLs that are friendlier when displayed by contacts. The following is an example of a personalized URL:

`http://company.com/go/acme/program?ContactId=12378748&email=john@doe.com`

The following is an example of a personalized URL with a PID:

`http://company.com/go/acme/program/john.doe`

When creating personalized IDs you must know the data restrictions that apply to your database. Defining a PID format using first and last name is effective only if the majority of records in your contact database include these values.

### To configure personalized IDs

1. Click Admin in the upper-right corner of the screen.
2. In the Registration Management section, click Personalized ID Configuration.
3. Enable Personalized ID by selecting the check box.
4. Select the Personalized ID Format from the available choices in the list, and click Add. You can choose two or more of the following values:

- First Name
- Middle Name
- Last Name
- Email - Username
- Email - Domain
- Contact Id
- Sequence Number (In the event that a contact may receive multiple personalized URLs.)
- Delimiters are: period (.), comma (,) underscore (\_) "-" and hyphen (-).

5. Define a PID format by arranging two or more of the previous components into a sequence.

When a PID format is defined, it is created for any new contact records that do not already have a PID.

6. Choose a sequence delimiter.

A sequence delimiter is appended if there is more than one record for a First Name and Last Name combination. In that event, the PIDs are as follows: John.Doe.1 and John.Doe.2.

The format selected appears in the right-hand column under Generated PID for Sample Contact.

7. Click Save to create PIDs for any new contacts entered into the database from this point forward, or choose Generate PIDs for Existing Contacts to establish PIDs for all existing contact records.

The process of creating PIDs for all database contacts can take a few minutes but is performed in background mode so you are free to proceed to other tasks.

### What Rules Apply When Oracle CRM On Demand Marketing Is Assigning PIDS to Contact Records

The following rules apply to the generation of PIDs for contact records, in the following order:

1. Oracle CRM On Demand Marketing uses the default PID format and generate a unique PID.
2. If some of the components used for deriving the PID are missing Oracle CRM On Demand Marketing uses components that have available data.
3. If all the components used for deriving the PID are missing Oracle CRM On Demand Marketing assigns the contact Id as the PID.
4. Oracle CRM On Demand Marketing assigns the contact ID as PID if the default PID results in multibyte data.
5. Oracle CRM On Demand Marketing increments the sequence number component of the PID and creates a distinct PID, for example, John.Doe.2, if a duplicate PID is found.

### To check to see if PIDs have been created

1. Navigate to the Contacts tab
2. Display a contact record.

The PID attribute and the value created appear.

If the PID for a contact contains multibyte characters that cannot be supported in a URL, then set the contact Id as the PID. The PID is always stored in lowercase. All characters from the PID components except for the following are removed: A-Z, a-z, 0-9, period, comma, hyphen, and underscore.

If necessary, it is possible to change the format of PIDs for contacts by deleting the format components and redefining the format. This format applies the new format to all new PIDs. You must regenerate new PIDs for all contacts in the database to replace the previous values. Consider the format carefully before you generate PIDs to avoid changes. System administrators can also edit individual PIDs manually. Oracle CRM On Demand Marketing verifies the uniqueness of the new PID before saving it.

If the PID format is changed after it has been in use by programs, templates, or microsites, the previous PID format does not work. If a contact clicks a link containing the old PID format, then the contact receives a blank Web form without prepopulated data. You can add the PID to an outbound email, a template, or a microsite page as you can with any other personalization attribute.

### To use PIDs in programs, templates, and microsites

1. During the creation of an email invitation, select the program profile from the left-hand list and one of the two choices from the right-hand list:
  - **Personalized Pretty URL using PID.** The tag is replaced with values from each contact record at run time.
  - **Personalized Pretty URL using PID (Click Here).** The words *Click Here* are inserted and linked to the URL.
2. Position your pointer where you want to place the tag in the email content, and click Insert.

## Configuring Cookie Consent

If you have contacts in Europe, then you must comply with the European E-Privacy Directive (Directive 2009/136/EC of the European Parliament and of the Council of 25 November 2009). This directive requires that Web visitors should be explicitly asked for their consent before placing a cookie on their computer.

Oracle CRM On Demand Marketing supports the following types of enablement:

- **Global enablements.** Enables cookie consent for all microsites, programs, topics and third-party pages with a Web site tracking script embedded in them.
- **Selective enablement.** Manually identifies the programs, microsites, topics and third-party pages with embedded Web site tracking script that require cookie consent enabled.

If you use the selective enablement option, then you must manually enable each microsite, program, topic, and Web site that requires cookie consent as follows:

- **Microsites.** Select the Enable Cookie Consent check box on a microsite's Microsite Definition page. For more information, see [Creating Microsites](#).
- **Programs.** Select the Enable Cookie Consent check box on a program's Branding and Pre-Registration page. For more information, see [Associating Registrations](#).
- **Topics.** Select the Enable Cookie Consent check box on a topic's Topic Definition page. For more information, see [Topic Fields in a Microsite](#).
- **Web Sites.** Select the Enable Cookie Consent check box on the Tracking Script page, and then click Generate to generate the script. For more information, see [Configuring Web Site Tracking](#).

The Enable Cookie Consent check box is in the program Branding and Pre-Registration Page. For more information, see [Associating Registrations](#).

You can decide to enable managed answer codes when each attribute is created rather than as a global setting. However, if you find that you create attributes where you require answer values and answer codes that are different, then you can enable this option (Enable Answer Codes) globally.

### To configure cookie consent

1. Click Admin in the upper-right corner of the screen.
2. In the Registration Management section, click Cookie Consent Configuration.
3. To enable cookie consent, select the check box Get Consent from Web Visitors Before Placing Cookies on their Browser.
4. Choose either:
  - **For all Programs, Microsites, Topics, and Third-party Web pages being tracked by the system.** Choose this option to enable cookie consent globally for all microsites, programs, topics and third-party pages with a Web-site tracking script embedded in them.
  - **For selected Programs, Microsites, Topics and Third-party Web pages being tracked by the system.** Chose this option to manually identify the programs, microsites, topics and third-party pages with embedded Web-site tracking script that requires cookie consent enabled.
5. For each language listed in the Consent Page Configuration list, click the Edit icon and add the appropriate text and buttons requesting the customer's permission to use a cookie

For example: To provide you with a better experience while navigating our site, may we place a cookie on your browser?

Make sure to embed the Allow and Do Not Allow buttons:

```
#{AllowButton("Allow")} #{DoNotAllowButton("Do not Allow")}
```

6. Click Save to close the edit page and return to the list of languages.
7. When done with all languages, click Save.

## Configuring Lead Management Options

Configure the following lead management components

- **Queues.** For more information, see [Configuring Queues](#).
- **Derive Attribute Lookups.** For more information, see [Configuring Derived Attribute Lookups](#).
- **Funnel.** For more information, see [Process of Configuring the Response Funnel](#).
- **Rules Summary.** For more information, see [Process of Configuring Rules Summary](#).
- **Rejection Flag.** For more information, see [Configuring the Rejection Flag](#).
- **Derived Attribute Rules.** For more information, see [Configuring Derived Attribute Rules](#).
- **Suppression Rules.** For more information, see [Configuring Suppression Rules](#).
- **Scoring Rules.** For more information, see [Configuring Scoring Rules](#).
- **Queue Assignment Rules.** For more information, see [Configuring Queue Assignment Rules](#).
- **Telemarketing Disqualification Reasons.** For more information, see [Configuring Telemarketing Disqualification Reasons](#).

## Configuring Queues

Responses that have passed through the stages of the response funnel can then be processed for distribution using queues. For example, one queue might be defined to pass all qualified responses to Sales. During the application-implementation phase for new customers, a queue is created as a default. If your company uses an inside Sales or Telemarketing organization to perform additional prequalification of prospects before distributing leads to Sales, one or several call center queues can be defined. Queues can also be defined to deliver leads to channel or business partners, or to keep campaign stake owners apprised of the level of response to a particular campaign or program.

You create a queue in two steps, for more information, see [Creating Queues](#).

Queue assignment rules are developed using the condition builder. All attribute values collected during the prospect's response (by Web form) or included in a contact import of registrations can be used to sort responses and assign them to a single or multiple queues. For more information, see [Configuring Queue Assignment Rules](#).

Typically, you perform the following tasks with queues:

- You can create a master queue to deliver qualified leads to another application.
- You can create separate queues for each sales territory or sales representative.



- You can create call center queues to deliver leads to a prequalification team.
- You can create industry-specific or product-line-specific queues to deliver leads to Sales specialists for that industry or product.
- You can create a queue to aggregate responses to a particular campaign or program and deliver to management.

### Attributes Frequently Used in Queue Assignment Rules

The following attributes are used in the queue assignment rules:

- Geographic attributes used to define a territory (country, state, or province).
- Lead scores, for example, deliver only A and B leads to Sales.
- Campaign or program names used to define queues that process only responses to a specific marketing initiative.
- BANT (Budget, Authority, Need, Time frame) values if not already used in scoring rules.
- Contact activity attributes, such as the number of downloads, frequency or duration of Web site visits, and event attendance.
- Product interest or industry.

Based on the delivery selected, contacts are either delivered by email, as a CSV (comma separated value) formatted file attachment to an email, delivered to a call center, or delivered as a file to a specified server.

Leads or prospects are assigned to queues and marked with a status. Queue assignments can be displayed under the Activities tab. The following table describes the queue status values.

Queue Status	Description
Pending	Leads or prospects are assigned to a queue but not yet published or sent to a distribution list.
Published	Leads or prospects are published to another application.
Sent	Leads or prospects are sent to the distribution list defined for a queue.
Failed	A prospect or lead was not assigned to a queue because some information was missing.

For more information, see:

- [Creating Queues](#)
- [Selecting Queue Delivery Options](#)
- [Creating a Call Center Queue](#)

## Creating Queues

Create as many queues as needed to effectively process and distribute responses.

### To create a queue

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Queues.

3. Click New Queue.
4. Enter the descriptive information for the queue, including a unique name and description.
5. Select the Queue Delivery System.  
Depending on the Queue Delivery System option chosen, additional configuration fields appear.
6. When you have completed the entries on the New Queue screen, click Next.  
The New Queue Attributes screen appears.
7. Select all the attributes from all categories that must be included in the email, CSV spreadsheet, or file.
8. When finished selecting attributes, click Next.  
The Queue Attribute Source Type Selection screen appears. This screen enables you to select whether you want the existing attribute values from the contact record to be included, or if the attribute values from the latest registration must be included, or both. By default, the attribute values from the contact profile are published.
9. Select Attribute Source Type for each attribute if it is different from the default.
10. Click Next.  
The Queue Attribute Sequence screen appears.
11. Sequence all the attributes selected into an order, which controls the order of columns in a CSV spreadsheet from left to right, to make the file more readable.
12. To move an attribute up or down, highlight the attribute, and click the up arrow or down arrow.
13. When satisfied with the order, click Next.
14. On the New Queue Configuration screen, select the schedule for the queue.
15. In the Recurrence section, select the frequency: Daily Weekly, Monthly, or Hourly.
16. Select the time (hour and minute).  
The time is based on the time zone configured for the active user.
17. (Optional) Click the check box, To Enable Email Notification on Failure.
18. Click Next.  
The Queue Details screen displays all the details configured for the queue.
19. Review all the queue details and when you are satisfied, click Save.
20. If you want to make changes to the queue configuration, click Previous to go back to the previous screen.  
You can edit the queue configuration at any time from the main queue list screen by clicking the Edit icon (pencil), or by clicking the linked queue name, and then clicking Edit.

## Selecting Queue Delivery Options

You have five options to deliver data by your queue:

- Email

- Email as CSV
- Call Center
- FTP
- SFTP

## Email

The Email Queue Delivery option sends a separate email for every prospect assigned to the queue. The Email option also sends a separate email for each action that qualifies the contact to be assigned to the queue. For example, if a prospect registers multiple times for the campaign defined in the queue assignment rules or registers multiple times within the time period defined in the queue assignment rules, multiple emails are sent. Email notifications are sent to all addresses identified in the distribution list.

### To select email as your queue delivery option

1. Complete the fields on the New Queue screen, and select Email from the Queue Delivery System list.  
Additional fields appear.
2. Complete the field for the distribution list by entering email addresses, one on each line.
3. Enter a From Address.
4. Enter a Subject line.
5. Click Next.

**Email as CSV** When you select the Email as CSV option, Oracle CRM On Demand Marketing sends an incremental CSV file as an email attachment to the designated distribution list. In this case, a prospect who meets the requirement for assignment to the queue multiple times within the specified period is listed multiple times in the CSV spreadsheet.

### To select the email as CSV option for your queue delivery

1. On the New Queue screen, enter the information, and select the type of delivery method as Email as CSV from the list.
2. Complete the field for distribution list by entering email addresses, one on each line.
3. Enter a From Address.
4. Enter a Subject line.
5. Click Next.
6. On the New Queue Attributes screen, select the attributes.  
These selected attributes are included in the individual email content.
7. Complete the configuration of the email queue.  
For more information, see [Creating Queues](#).
8. On the New Queue Attributes screen, select the attributes.  
These selected Attributes are included in the assigned queue CSV spreadsheet.

Each attribute selected corresponds to a column in the CSV spreadsheet. By default, the columns are ordered as follows:

- All demographic attributes in alphabetical order
- All insight attributes in alphabetical order
- All prospect insight attributes in alphabetical order
- All campaign attributes in alphabetical order
- All program attributes in alphabetical order

**To control the order of columns in the spreadsheet**

1. Use the Sequence buttons to move attributes (and thus columns) to a more logical order from left to right.
2. Sequence the attribute order on the Queue Attribute Sequence screen.
3. In the Recurrence section, select the frequency and time. Click Next.

The Queue Details screen displays all the details configured for the queue.

4. When you are finished, click Save.

If you do not choose to sequence the attributes in a preferred order, they are listed in columns in alphabetical order within each category. First, all demographic attributes are listed in alphabetical order, then all insight attributes are listed in alphabetical order.

**Selecting Call Center as the Delivery Option** When you select call center as the delivery option, Oracle CRM On Demand Marketing sends all queue prospects to a call center queue where they can be contacted and qualified further by a call center or telemarketing agent. Leads assigned to the call center can be displayed in the call center module under the Activities tab. You might want to define several call center queues with different queue assignment rules by geographic sales territory (country, region, or district), or by industry segment or product line.

**To select call center as your queue delivery option**

1. Complete the fields on the New Queue screen, and select Call Center from the Queue Delivery System list.
2. In subsequent steps you select the call center agents who are assigned to the new queue.

For more information, see [Creating a Call Center Queue](#).

**FTP or SFTP** When you select FTP or SFTP as the option, Oracle CRM On Demand Marketing sends a CSV file with new prospects to the configured FTP or SFTP address each time the queue runs.

**To select FTP or SFTP as your queue delivery option**

1. On the New Queue screen, enter the descriptive information, and select the type of delivery system as FTP or SFTP from the list.  
Additional fields appear.
2. Enter the FTP or SFTP credentials.
3. Click Next.
4. Select the attributes.

For more information, see [Creating Queues](#).

5. In the schedule configuration for both FTP and SFTP you are asked to indicate if the processing for this queue can be automatically reoccurring at a defined interval.
6. To validate the FTP or SFTP credentials, click Test FTP or Test SFTP.

The queue files are published to the server with a filename, which consists of the queue name and a date and timestamp. Each time the queue runs a new file is posted.

## Creating a Call Center Queue

To deliver leads to the Call Center module of Oracle CRM On Demand Marketing, create a queue as you would any other, but choose Call Center as the queue delivery system. The subsequent configuration options presented are specific to a call center queue. You must identify the call center agents who are responsible for following up with prospects delivered to the queue, and you must associate a default call script for the queue from the list of available (preconfigured) call script Web forms.

### To create a call center queue

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Queues.
3. Click New Queue.

The New Queue screen appears.

4. Enter the descriptive information for the queue, including a unique name and description.
5. Select call center as the queue delivery system.

A new selection appears requesting the optional association of a default call script.

6. Select the Default Call Script by clicking the Lookup Icon (magnifying glass), which displays a window of all the available call script Web forms.
7. Click the Option button next to a call script, and click Select.

You can set a default call script for the queue if there is not a subject-specific or program-specific call script that you prefer to use. Associating a call script is optional, but it is useful to give agents a form to use so that they can collect additional prospect information during conversations.

8. To preview the call script, click the Preview link, and click Next.
9. On the Assign Telemarketing Agents screen, scroll through the list of available call center agents and select one or more names, (hold the Control key to select more than one). Then click the right arrow to add the names to the list of selected agents on the right.
10. To remove an agent, select the name in the right window of Selected Agents, and click the left arrow to move back to the list of available agents.

11. Click Next, and then click Next.

The Queue Details screen appears.

12. Click Save.

The complete contact record for each prospect assigned to a call center queue is available to the call center agent when following up with each lead. This step helps the agent prepare to contact the prospect with all relevant contact information, including the most recent registration data.

## Configuring Derived Attribute Lookups

*Derived attributes* are attributes whose value is not captured from contacts, but it is derived by applying lookups or formulas to other existing attribute values. Derived attributes allow you to populate contact information without asking each contact to provide that specific information. For example, to assign contacts to a sales region or district, which is internal information that the contact would not be likely to know, create derived attributes based on state, province, or country to populate the derived attributes of the district and region. The lookups used to derive attributes are called *derived attribute lookup tables*. For example, a lookup table for cities and their postal codes in the United States might have the following values.

Key	Value
Abbeville	36310
Abernant	35440
Adamsville	35005
Addison	35540

Another use of attribute lookups is to provide a list of choices that map to a smaller set of answers. For example, you can ask: Does prospect have budget? You might want values of Yes or No, but the attribute question asked on the Web form can be values presented as dollar ranges, as follows:

Key	Value
\$100,000 - \$300,000	Yes
\$301,000 - \$500,000	Yes
\$501,000 - \$750,000	Yes
Don't know	No

### To configure a derived attribute lookup

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Derived Attributes Lookups.  
A list of the existing derived attribute lookups appears.
3. Click Create Lookup.  
The New Lookup screen appears.
4. Fill in the Lookup Name, Code, and Description fields.
5. Upload the CSV file by clicking the Browse button.  
You can load only 20,000 records during one import session.
6. Select the file, and click Open.
7. If applicable, click the Does File contain a Header Row check box.

This marks the first row of the file as the header. If you do not select this option, Oracle CRM On Demand Marketing considers all the rows as records.

8. Click Next.

The Validation screen displays the number of records and the first 10 rows of the file and lists any errors that have been encountered while importing data. The error types include:

- Failed parsing
- Exceeded column length
- Missing key or values

9. To display details about any errors, click the More link.

10. Do one of the following:

- If there were no errors or after errors are corrected, click Done on the Confirmation Screen.
- If errors occurred, you can edit the lookup configuration by clicking the Edit icon.

On the Edit Lookup screen, you can select the file mode. You can either append a file or replace the existing file by uploading a new file.

Selecting Append from the File mode appends the records of the new file to the existing file. The import process checks for duplicate values and removes them. Selecting Replace All replaces all the records in the existing lookup file.

11. To export the lookup file, click the file name under the Lookup Name section, and then click the Export link.

## Process of Configuring the Response Funnel

The *response funnel* includes several stages for validating, blocking, and distributing responses from Web forms, contact imports, and registrations, which were set manually by editing a contact record.

To configure the response funnel, perform the following tasks:

- [Configuring the Rejection Flag](#)
- [Configuring Derived Attribute Rules](#)
- [Configuring Suppression Rules](#)
- [Configuring Scoring Rules](#)
- [Configuring Queue Assignment Rules](#)

## Process of Configuring Rules Summary

To configure response management rules, perform the following tasks:

- [Configuring the Rejection Flag](#)
- [Configuring Derived Attribute Rules](#)
- [Configuring Suppression Rules](#)
- [Configuring Scoring Rules](#)
- [Configuring Queue Assignment Rules](#)

## Configuring the Rejection Flag

This option enables you to have or not have a rejection flag as a step when managing responses. If this option is selected, all incoming responses are checked for incorrect data, such as abc, sdf, and so on. The standard rejection list includes over 600 entities, including junk characters, slang, and vulgarities. Oracle CRM On Demand Marketing checks First Name, Last Name and Email fields and rejects any response containing the character strings on the reject list. The registration data is deleted. Rejected responses are not included in reporting and no error message is displayed to the contact who completes the registration form.

### To display rejected responses

- Click the Activities tab, select registrations, and enter *Deleted* in the Status field, then click Filter.

If the rejection flag is left unchecked, all responses are sent to the Suppression stage of the response funnel.

### To configure the Rejection flag

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Rejection Flag.

The Rejection Flag screen appears.

3. Select the check box to apply the rejection rules to all incoming responses.

## Configuring Derived Attribute Rules

To configure derived attributes, you have the option of uploading lookup tables or defining derived attribute rules. To determine which method works the best for your situation, see [Configuring Derived Attribute Lookups](#).

### To configure a derived attribute rule

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Derived Attribute Rules.
3. Click New Rule.

There are two ways to derive attribute values: lookup-based and set absolute value.

### Lookup-Based Rule

This rule means: derive the value of attribute X (ZIP or postal code) by looking up attribute Y (city) in the key of a lookup table. For more information on uploading a lookup table, see [Configuring Derived Attribute Lookups](#).

For example, the lookup table for cities and their postal codes in USA might be as follows.

Key	Value
Abbeville	36310
Abernant	35440
Adamsville	35005
Addison	35540



### Set Absolute Value Rule

This rule means: set the value of attribute X as a static value that you define in a rule based on another attribute.

For both of the previous examples, you can specify additional conditions that have to be evaluated before deriving the value. The values are derived only if the conditions are true. Conditions are defined using a condition builder, in the same way when defining target list conditions.

#### To define conditions

1. Select the profile, profile attributes, and operators from the lists.
2. Under the Value section, enter the value, and click Save.

### Example: Derive Attributes Using Value

If a prospect is associated with an account, and if Sales is in the final stages of closing an opportunity, then you might want to set the Hands off Attribute value to True whenever XYZ Company is listed in the contact record.

### Example of Deriving an Insight Category Attribute Using a Lookup Table

To derive the insight category attribute, District, from the demographic category, Country, create a lookup table, such as the following:

Key	Value
Colombia	South America
Venezuela	South America
Peru	South America
Argentina	South America

### Example of Deriving an Insight Category Attribute by Defining a Rule

You can also accomplish the same derived attribute by defining a rule.

#### To define an insight category by defining a rule

1. Define an insight attribute for District.
2. You can edit, delete or copy a rule by clicking the appropriate icon.  
A rule cannot be deleted if it is active. First it must be deactivated and then deleted.

## Configuring Suppression Rules

This task filters or suppresses prospects. The filter is based on rules that have been defined. Prospects who were not rejected by the rejection task are passed to this stage. A suppressed prospect is assigned a Rejected status if it matches the filtering criteria. If this rule is not enabled, all responses are sent to the next scoring rule.

#### To create a suppression rule

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Suppression Rules, and then click New Rule.

3. On the New Suppression Rule screen, enter the information, and click Save.
4. On the Suppression Rule Details screen, add filters by clicking Add Filters.

**To define filters**

1. Select the profile, profile attributes, and operators from the respective lists.
2. Under the Value section, enter the value, and click Save.

For example, defining a filter might suppress responses from competition using either email domain or company name. Use acronyms carefully. Or, a filter might suppress all internal contacts from your company.

After entering and saving filter conditions, you can choose to preview the data before activating a rule.

## Configuring Scoring Rules

This option configures scoring as a step in the managing responses. If scoring rules are enabled, all incoming responses are scored using the defined scoring rule before being passed on to the qualifying step. If scoring rules are not enabled, all responses are sent to the next qualifying rule.

**To create a scoring rule**

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Scoring Rules.
3. Click New Rule.
4. On the New Scoring Rule screen, enter the information, and then click Save.
5. On the Score Rule Details screen, define filters by clicking New Filter.

For example, a Very Hot lead has been defined where the profile contains the following:

- Completed demographic information, such as email, business phone, city, postal code, and country
- Registered for any of the lead-generation programs
- Qualified for the Budget, Authority, Name and Time (BANT) criteria; that is, has answered questions relating to the BANT criteria

You can edit, delete or copy a rule by clicking appropriate icon. To delete an active rule, first it must be deactivated, and then deleted.

## Configuring Queue Assignment Rules

This option assigns responses to a queue. If queue assignment rules are enabled, all incoming responses are assigned to a queue using the user defined queue assignment rules. If queue assignment rules are not enabled, all responses remain unassigned.

**To create a queue assignment rule**

1. Click Admin in the upper-right corner of the screen.
2. In the Response Management section, click Queue Assignment Rules.
3. Click New Rule.

The New Queue Assignment Rule screen appears.

4. Enter the required descriptive information, and click Save.
5. On the Queue Assignment Rule Details screen, click Add Filters.  
The Define Filters screen appears.
6. Select the appropriate profile, attribute, operator from the list.
7. Select or enter the appropriate value.
8. Choose a queue from the Assign Response to Queue list.
9. Click Save.  
A queue must be created before rules can be defined.
10. On the Queue Assignment Rule Details screen, under the Preview And Activation section, click Activate.  
Only one rule can be activated at a time. However, a single rule can have many conditions.

#### **To display the status of the contacts assigned**

1. Click the Activities tab, and then Queues.
2. Search for and select the queue that you are interested in.

## **Configuring Telemarketing Disqualification Reasons**

Call center agents use telemarketing disqualification reasons to flag prospects assigned to their queues who are disqualified or not appropriate for referral to Sales for followup. There might be many reasons why a prospect is disqualified and all of them might not mean that the contact information is inaccurate, incomplete, or that the prospect is a dead end. Disqualification reasons are completely customized in line with your organization's business processes, and how your team defines both qualified and disqualified states. You can create as many disqualification reasons as you want. Some examples of disqualification reasons are the following:

- Not interested
- No budget
- Unable to reach prospect (The prospect is not responding to calls or emails.)
- In selection process with competitive solutions (The prospect is already selecting a competitor's product.)
- Incorrect data
- Wrong contact (No purchase authority)

Using precise disqualification reasons helps you to download target lists for all prospects disqualified for a particular reason and start campaigns to try to resurrect these prospects or learn more about them. For example, if a prospect is disqualified now with the selected reason of No Budget, it is possible that the budget might be allocated for the prospect's project at a later date. Continuing to nurture such prospects can result in additional responses, which helps you to qualify the prospect later. Staying active with the prospect and providing information relevant to the prospect might result in a favorable opinion of your company's solutions if a prospect advances to the stage where there is a budget and is researching technical solutions actively.

#### **Creating Disqualification Reasons**

To create disqualification reasons, follow this procedure.

### To create disqualification reasons

1. Navigate to the Disqualification Reasons list screen, and click New Reason.
2. Enter the name and description for the new disqualification reason, and then click Save.

The new disqualification reason appears as a choice in a list that agents can select from.

## About Contact Management

The only configuration you can do with contacts is to perform a bulk delete of contacts. For more information, see [Deleting Multiple Contacts](#).

### Deleting Multiple Contacts

Keeping a contact database complete and up-to-date is a challenge. Over time it is inevitable that you accumulate records that are incomplete, contain incorrect data, or the contacts have indicated that they want to be removed from your emailing lists. Oracle CRM On Demand Marketing provides a bulk delete utility to help you periodically delete your database of contact records that are unusable and are taking up space. The bulk delete feature does not delete contact records flagged with Global Email opt out.

#### Guidelines Before Performing a Bulk Delete

Before bulk deleting contacts, consider the following:

- **No cancel option.** When you have confirmed your request to delete contacts you cannot cancel or stop the deletion.
- **Global email opt outs.** Oracle CRM On Demand Marketing does not delete records of contacts who want to be removed from all your outgoing emails and subsequently are included in the master Opt Out table. The records for these contacts remain in the database.
- **Delete in other applications also.** Contacts deleted from Oracle CRM On Demand Marketing also must be manually deleted from other applications. Otherwise, the same contacts might be recreated during the next data synchronization between the two applications.
- **Activity history.** When contact records are deleted, all activity history related to those records is also deleted.
- **Target list validation.** Using the bulk delete contacts function there is no validation performed for the following:
  - Contacts targeted for deletion to determine if they are included in target lists for programs not yet launched
  - If contacts are present in the inclusion lists for automated campaigns. Records identified for deletion are deleted regardless
- **No recovery of bulk delete contacts.** Deleted records cannot be recovered. However, before the bulk delete request is confirmed, the exclusion list used to create the bulk delete can be exported and then later reimported to recreate contacts, if necessary. All previous contact activity is lost.
- **Delete count: no limitation.** There is no limit to the number of contact records that can be included in a single bulk delete request.

- **List count could increase before execution.** The exclusion list count might increase between the time that the list is created and the delete job is executed if new contacts become eligible for the list during this time.
- **Delete request execution timing.** When you confirm your bulk delete request Oracle CRM On Demand Marketing begins reviewing the list and creates the delete job. Because of the potentially high number of records that might be included in any single bulk delete request, bulk delete jobs run during nonpeak hours late at night or early in the morning. This delayed processing does not provide the opportunity to cancel bulk delete requests when they are confirmed.  
  
If you want to delete contacts immediately, using the single-contact, delete functionality or multiple-contact, delete functionality, the deletions occur immediately.

### Guidelines for Doing Bulk Deletions

This topic provides guidelines for doing bulk deletions. Consider the following:

- **No recovery.** Use caution when performing bulk deletion of contact records. When records are deleted, they cannot be recaptured in full.
- **Plan.** Develop a record deletion plan with your team to periodically perform mass deletions of unusable contact records.
- **Privileges.** Assign bulk delete privileges to only a few members of your team, for example, those with system administrator roles.
- **Exclusion lists.** Consider the exclusion lists currently in use and determine whether these can be used to periodically delete records that meet the exclusion list criteria, for example, invalid email addresses.
- **Count.** Verify the list count and display contacts before confirming a delete request.
- **Export.** You might want to export the exclusion list set up for each bulk-delete request as a safeguard before you process the bulk deletion. When the exclusion list is associated with a bulk delete request you cannot edit the list filters. Also, by exporting the list from the list screen you can select all attributes to be exported. Exporting the deleted contacts from within the bulk delete configuration allows only the following fields to be included in the export file: Contact Id, First Name, Last Name, Email, Company Name, and Contact Type.
- **Maintain.** Keep your Global Exclusion Lists because new contacts might meet the exclusion list criteria at any time.

### Performing a Bulk Deletion

The following procedure shows you how to delete multiple contacts.

#### To perform a bulk delete of contacts from the Contacts tab

1. Navigate to the Contacts tab.  
The default screen is All Contacts view.
2. Search for the contacts that you want to delete.
3. Select a single or multiple check boxes to the left of the contacts that you want to delete.
4. Click Delete.
5. Confirm your deletion request.

## Configuring Web Site Tracking Management Options

Configure the following Web site management components:

- **Configuration of Web Site Tracking.** For more information, see [Configuring Web Site Tracking](#).
- **Tracking Scripts.** For more information, see [Configuring Tracking Script](#).

### Configuring Web Site Tracking

Web site tracking is the capability to capture a contact's browsing activities on a Web site. Using the Web site tracking solution marketers can track activity on any Web site for both anonymous and known visitors. You can display Web site activity profile fields in List Management, Response Management, and Campaign Automation condition builders. You can use Web site tracking to track the activities of a prospect, and then to target, score, and qualify the prospect. With Web site tracking you can also track the time spent on a particular page.

#### To configure Web site tracking

1. Click Admin in the upper-right corner of the screen.
2. In the Website Tracking Management section, click Configuration.
3. Select one of the following options:
  - **Manual Tracking.** Select this check box to enable Web site tracking, then enter the time and page categories. On the Tracking Script screen, generate the code, and then insert it in Web pages that can be tracked. The code can be inserted in any Web page.
  - **Automated Tracking.** Campaign Registration and Microsite activities can be tracked automatically without adding JavaScript code. Click the check boxes for Enable Web site tracking, Track Program Registrations and Track Microsite Visitors.

#### Example of Using Page Categories to Display Activity Reports

To provide statistics for reporting, you can create page categories that reflect the way your corporate Web site or a microsite is organized. For example, you can have major sections of your corporate Web site dedicated to information on:

- Products
- Industry solutions
- Customer services
- News
- Contact us
- Search

For example, you might want to create a page category for each of the Web site areas listed. Then create a script for each of the categories. This script enables you to report on aggregate visits to that category of Web pages.

#### To display the contacts who have visited the Web site

- From the Activities tab, click Activities, select Contact Activities, and select Website Visitors.

Automated tracking monitors activity only for microsite pages hosted within Oracle CRM On Demand Marketing

### To display Web site activity

1. From the Activities tab, click the Activities tab.
2. Under the contact activities, select a view for either All or Recent Website Visitors.

## Configuring Tracking Script

You can generate a generic tracking script (to be used across all pages of a Web site) or page-specific tracking script. A tracking script, which is page specific with page level metadata, such as product name, solution name, and so on, can be embedded within specific pages of a Web site.

### Generic Script

One option is to generate a generic script that can be placed in the global header code that is added to all the pages on the Web site. Ensure that the script is added before the closing body tag (</body>). The following is a sample generic script:

```
<script id="m2lwst" src="https://company.com/wt/m2lwst.js"></script>
<script language="javascript">
    _m2lTracker.tenantId ='1';
    _m2lTracker.tenantCode ='DEMO';
    _m2lTracker.track();
</script>
```

### Page Specific Script

You can also generate specific scripts for individual Web pages. For example, for Web pages that present information about routers you can add additional metadata (up to 5 levels of metadata on a page), and a page specific script can be generated. Ensure that the script is added before the closing body tag (</body>). The following is a sample of a page-specific script:

```
<script id="m2lwst" src="https://company.com/wt/m2lwst.js"></script>
<script language="javascript">
    _m2lTracker.tenantId ='1';
    _m2lTracker.tenantCode ='DEMO';
    _m2lTracker.category['Products']='Router';
    _m2lTracker.track();
</script>
```

With the previous script, any visits to this page are tagged as routers for the Web category of products. You can use this information for list segmentation. For example, you can target all contacts who have visited the Web site where Web category is Router for a followup campaign. Although this option yields specific tracking information, it is time consuming to add a specific script to each of the pages on the Web site separately.

You can define page categories that pertain to the main sections of a Web site, such as products, industries, services, and so on. This category-specific script can then be added to all pages within the main Web site section for products. Visits are reported as product visits.

### Generating a Tracking Script

A script or code is generated based on the configuration. This script or code can then be inserted in Web site pages to allow you to capture the activities of contacts who are browsing.

#### To configure a tracking script

1. Click Admin in the upper-right corner of the screen.
2. In the Website Tracking Management section, click Tracking Script.
3. Enter the information, and then generate the code by clicking Generate.

The generated code must be inserted between the <body> and </body> tags in the source code for the Web page.

When the script is added to the Web pages, all anonymous and known visitor activities are tracked. For known contacts, their contact profile is updated.

#### To display Web site visits in real-time

1. Navigate to Activities, Contact Activities, and then select the view for All or Recent Known Website Visitors.
2. To display details for a specific contact or a Web site visit, click the linked Visit Date.
3. The following details are displayed:
  - Pages viewed
  - Number of unique page views
  - Time spent on a page
  - Total time spent on a visit in one session
  - IP address
  - Contact information, such as the name, company name, and email addressWeb-site activity history is available for individual contacts in their contact record.

## About Job Reports

You can display the following job reports:

- **Job Status.** For more information, see [Displaying Job Statuses](#).
- **Webform Dedupe Report.** For more information, see [Configuring the Webform Dedupe Report](#).

### Displaying Job Statuses

The Job Status functionality checks the status of scheduled jobs, such as campaign automation, program launch execution, or contact imports. It also enables you to track whether a particular scheduled job was executed on time, check the status, and whether the job was successful. The following business functions are scheduled using the job status functionality:

- Response management and publishing to Oracle CRM On Demand
- Data imports from offline sources, using text files
- Data synchronization from Oracle CRM On Demand



- Campaign automation to check which programs and which contacts must be targeted

### About Job Status Periods

The Job Status list displays all campaign executions within the last 14 days and the last 50 runs of any automated job, such as data synchronization with Oracle CRM On Demand. Some jobs, such as the response funnel job, which run multiple times a day produce so much data in brief periods that it is inconvenient to display and unrealistic to keep them active. For jobs that run once a week, there are 50 weeks of data available under the Job Status list. For jobs that run more than once a day, there are 14 days of data available under the Job Status list. All data is retained and archived. Archival of older data improves the performance for accessing the more recent data displayed. Contact Import reports do not allow download of contact level data for import jobs older than 60 days.

### To display the job status

1. Click Admin in the upper-right corner of the screen.
2. In the Job Reports section, click Job Status.
3. (Optional) Search the list of displayed jobs by checking the Is Recurring Job box and then choosing a specific job name from the Job Name drop down menu, and then click Search.
4. (Optional) Search the list of displayed jobs by checking choosing a status from the Status drop down menu, and then click Search.
5. Click the name to display details.

## Configuring the Webform Dedupe Report

When a contact registers through a Web form, contact information is deduplicated against existing contacts (using deduplication rules). Duplicate contacts are merged into a single contact. The existing contact is updated. On the Webform Dedupe Report screen, Oracle CRM On Demand Marketing displays a list of contacts that was merged in this process.

### To configure the Webform Dedupe report

1. Click Admin in the upper-right corner of the screen.
2. In the Job Reports section, click WebForm Dedupe Report.

The Dedupe Merge Log Search screen displays the contacts who have been merged if the WebForm Dedupe Rules have been applied.

3. (Optional) To modify the contact details, click the Edit icon.

## Configuring Security Management Options

Configure the following security management options:

- **Users.** For more information, see [Editing User Information](#).
- **Roles.** For more information, see [About Roles](#).
- **Language Selections.** For more information, see [Configuring Which Languages You Want to Use](#).

## Editing User Information

In Oracle CRM On Demand Marketing you can display information about users and make minor edits to a user's information. You cannot add new users or edit all user information fields. To add or edit user information, use Oracle CRM On Demand.

The Users list displays the users who are authorized in Oracle CRM On Demand to use Oracle CRM On Demand Marketing. The only actions you can take is to search for users and to edit minor information about a selected user.

### To edit a user's information

1. Click Admin in the upper-right corner of the screen.
2. In the Security Management section, click Users.
3. (Optional) Search the list of users by using the User Login or the User Email fields, and then click Search.
4. Click Edit (pencil) icon in the Action column for a specific user record.

The Edit User page appears and displays information about the selected user. Only some of the fields are editable.

5. In the Edit User page, you can edit the following fields:
  - From Address Name
  - From Address Email
  - Email Signature
  - Image URL
  - Website URL
  - Chat URL
  - Pagination Size
6. Click Save or Cancel.

## About Roles

In Oracle CRM On Demand Marketing, you manage roles in the Roles list page and in the Edit Role page. A role is similar to a business function that a user performs within an organization, such as a sales executive function or a service manager function. Within your organization, your business function gives you certain privileges and permissions that are unique to your business function. Similarly, within the context of Oracle CRM On Demand Marketing, roles differentiate one business function from another, in the following ways:

- By defining the features that a user has the privileges to use
- By defining the set of permissions the user is given to work with protected information
- By defining the user interface settings that display information

### Prebuilt Roles

Oracle CRM On Demand Marketing provides several prebuilt roles that you can use as your starting point for setting up roles for your company. The prebuilt roles are:

- Super user
- Sales user

- Marketing user

### **Guidelines for Setting Up Roles**

The names of the prebuilt roles do not necessarily match your company's job titles. You must match job functions and tasks to the roles, not job titles. When setting up roles, follow these guidelines:

- Determine how each employee or group of employees will use Oracle CRM On Demand Marketing.
- Determine what tasks they must complete and which records they require access to.
- Determine what kind of access they require to each type of record.
- Determine if there are records or tabs that they must not be able to access.
- Review the characteristics of each of the prebuilt roles to determine if these roles meet the needs of your employees.

### **To add a new role**

- To add a new role, click New Role. For more information, see [Configuring Roles](#).

### **To copy an existing role**

- To copy a role, click the Copy icon in the Action column. For more information, see [Configuring Roles](#).

### **To delete an existing role**

- To delete a role (except the super user role), click the Delete icon (X) in the Action column, and confirm the deletion.

### **To edit an existing role**

- To edit a role (except the super user role), click the Edit icon in the Action column. For more information, see [Configuring Roles](#).

## **Configuring Roles**

You can control the access each role has to various types of information, such as which tabs are accessible in Oracle CRM On Demand Marketing, which objects are accessible, which actions (such as performing a bulk deletion of contacts) are available, and so on. For example, the ability to launch programs is typically restricted to a few specific roles and is not generally available to all users.

When you add, copy, or edit roles you work with the Edit Roles page. The following procedure describes how to configure roles.

### **To configure roles**

1. Click Admin in the upper-right corner of the screen.
2. In the Security Management section, click Roles, and then do one of the following:
  - To add a new role, click New Role.
  - To copy an existing role, click the Copy icon in the Action column.
  - To edit an existing role, click the Edit icon in the Action column.
3. Complete the Role Name and Role Description fields.

4. In the Tabs section, select the check boxes to indicate which tabs are visible for this role.

The Standard Object Permissions section displays a matrix of objects on the vertical axis and actions on the horizontal axis.

5. In the matrix, select the check boxes to indicate which actions are permitted for each object.
6. In the Business Permissions section, select the check boxes to indicate the access permissions for this role.
7. In the Administrative Permissions section, select the check boxes to indicate which admin functions are available for this role.

---

**Note:** Those users who have the Security Management permission can redefine their own role's configuration.

---

8. Click Save.

## Configuring Which Languages You Want to Use

Oracle CRM On Demand Marketing supports multiple languages. You can configure which languages that you want to use with Oracle CRM On Demand Marketing.

### To configure which languages you want to use

1. Click Admin in the upper-right corner of the screen.
2. In the Security Management section, click Language Selections.

The Language Selections screen appears. This screen lists the languages that Oracle CRM On Demand Marketing supports.
3. To enable the use of a language, click its Active check box.

You can select multiple languages.
4. Click Save.

## Configuring Email Management Options

Configure the following email management components:

- **From Email Addresses.** For more information, see [Creating an Email Using From Addresses](#).
- **Email Signatures.** For more information, see [Configuring Email Signatures](#).
- **Forward to a Friend.** For more information, see [Configuring Forwarding Email to a Friend](#).

## Creating an Email Using From Addresses

Oracle CRM On Demand Marketing provides configuration for using standard From Addresses when sending email invitations to contacts. An administrator must manage the addition of the new From Addresses to provide a clear indication of who is sending the email and that employees are adhering to company standards. Spam filters on email servers are continuously updated to stop emails from mass marketers.

Ensure that any From Address configured is a legitimate email address with an alias configured if necessary and that someone is assigned to monitor that address.

#### **To create an email From Address**

1. Click Admin in the upper-right corner of the screen.
2. In the Email Management section, click From Email Addresses.
3. Click New Email Address.
4. In the New Email Address screen, enter the email address and description, for example, Events <events@company.com>.
5. Click Save.
6. You can edit or delete an email address by clicking the applicable icon.

## **Configuring Email Signatures**

Outbound emails can be customized with the email signature of the targeted contact's sales representative or contact owner. You might also occasionally want to send email from a corporate executive. You can configure email signatures in the profile record of any Oracle CRM On Demand Marketing user and also configure the default email signatures.

For example, when sending corporate announcements you might want to use the email signature of a corporate executive or product manager in the emails sent to your entire contact list. Alternatively, you might want to personalize the outbound message, so that the message delivered to each individual contact is customized with the email signature of the contact owner or sales representative who is responsible for the account. When creating the email invitation, personalization options for the contact owner can be selected and inserted.

Default email signatures do not replace the contact owner signatures if a contact owner is specified in the contact record. If no contact owner is specified for a particular contact, Oracle CRM On Demand Marketing uses the default email signature.

#### **To configure email signatures**

1. Click Admin in the upper-right corner of the screen.
2. In the Email Management section, click Email Signatures.
3. Click New Email Signatures.
4. On the New Email Signatures screen, enter the email signatures, and click Save.
5. You can edit or delete email signatures by clicking the Edit or Delete icons.

## **Configuring Forwarding Email to a Friend**

Forwarding email messages from Web email clients does not gather information on persons to whom you forward the email message. However, if you forward email messages, using the Forward to a Friend functionality in Oracle CRM On Demand Marketing, it tracks all forward email messages and enables you to generate new contacts. This functionality automatically inserts a URL that primary email recipients can click to forward the email message to their friends and colleagues. If a registration link is included in the email invitation Oracle CRM On Demand Marketing automatically substitutes the Guest Pretty URL when the message is forwarded. By clicking the Forward to a Friend link in the email invitation the primary recipients are taken to a Web page where they can specify the email addresses to which they want to

forward email and add a personal note. Primary recipients are allowed to forward emails to 10 friends at one time.

### To configure forward email to a friend

1. Click Admin in the upper-right corner of the screen.
2. In the Email Management section, click Forward to a Friend.  
The Forward to a Friend Configuration screen appears.
3. On the Forward to a Friend Configuration screen, enter the details.

Field	Description
Branding	<p>The Forward to a Friend page can be configured with a branding template. If a branding template is not configured globally under the Forward to a Friend functionality, Oracle CRM On Demand Marketing applies the default program branding if available. The branding template used for the Forward to a Friend functionality can be simple.</p> <p>The following parameters are recommended:</p> <ul style="list-style-type: none"> <li>■ You must include your company logo and some instructional text to inform the person forwarding the message what happens when the Forward to a Friend Web form is submitted. For example, you might want to include an assurance that recipients of the email will not receive email from your company unless they explicitly opt in.</li> <li>■ The branding template requires the standard <code>\$\$MBOS_CONTENT\$\$</code> parameter in the template table indicating where the Forward to a Friend Web form is located.</li> </ul>
From Address Configuration	By default, the From Address in the initial invitation is used. However, you can select the option to use the referrer's email address. In this case, all the forwarded emails have the referrer's email address listed in the From Address field.
Configure Fields to be displayed on the Forward to a Friend Page	You can select the required fields that display on the referral page, and select the check box to make them mandatory. By default, certain fields are selected, such as Email, Note, and Email Subject.
Contact Acquisition Strategy	<p>The following options are available in the Contact Acquisition Strategy window:</p> <ul style="list-style-type: none"> <li>■ <b>Do Not Create Contacts.</b> If you select this option, Oracle CRM On Demand Marketing does not create a new contact record for the email address to which the message is forwarded.</li> <li>■ <b>Create Contacts (Dedupe Rules are applied).</b> If this option is selected, Oracle CRM On Demand Marketing creates new contact records for the email addresses of forwarded contacts. If you select Create Contacts, the following choices are displayed: <ul style="list-style-type: none"> <li><b>Opt In the Contact.</b> Contacts receive vendor emails from your company through Oracle CRM On Demand Marketing.</li> <li><b>Opt Out the Contact.</b> Contacts do not receive vendor emails from your company through Oracle CRM On Demand Marketing.</li> <li><b>Leave as Unknown.</b> Emails are sent to the contacts.</li> </ul> </li> </ul>
Thank You Message	You can create your own Thank You page by selecting a free-form, or you can insert a Thank You page URL.

## Configuring Field Management Options

Configure the following field management components:

- **Campaign.** For more information, see [Creating Campaign Custom Fields](#).
- **Program.** For more information, see [Creating Program Custom Fields](#).

## Creating Campaign Custom Fields

The Campaign Custom Fields section enables you to create additional fields to capture and store descriptive information for a campaign in addition to the information entered in standard campaign fields.

When you create a custom field it appears in the campaign header for each new campaign you create. Custom fields are automatically assigned a smart tag, which enables their use in templates, email messages, landing pages, and microsites. The syntax used for a campaign custom field smart tag is:

`${Campaign.CampaignNewCustomFieldName__c}`

- Spaces are replaced with underscores (\_).
- Characters are changed to all uppercase.
- The name is appended with two underscores and lowercase *c*, for example: `__c`.

For example, for the custom field Fiscal Year, its smart tag is `${Campaign.FISCAL_YEAR__c}`. For more information on smart (insertion) tags, see [About Email and Sales Representative Personalization](#).

### To create a campaign custom field

1. Click Admin in the upper-right corner of the screen.
2. In the Field Management section, click Campaign Custom Fields.
3. In the Campaign Custom Field List screen, click Add.
4. In the Create Custom Field screen, enter the field name.
5. Choose the display type from the menu.  
If you choose Picklist, you are prompted to enter the picklist values.
6. (Optional) If the field is mandatory, select the Mandatory check box.
7. Enter the field description.
8. (Optional) Set a default value.
9. Click Save.

Custom fields are automatically assigned an Oracle CRM On Demand Marketing smart tag, which enables their use in templates, email messages, landing pages, and microsites. The syntax used for a new Campaign custom field smart tag is:

`${Campaign.CampaignNewCustomFieldName__c}`

- Any spaces are replaced with underscores (\_).
- Characters are changed to all uppercase.
- The name is appended with two underscores and the lowercase letter "c", as in: `__c`. For example, the custom field Fiscal Year smart tag is: `${Campaign.FISCAL_YEAR__c}`.

Custom fields can be edited or deleted by clicking the Edit or Delete icons. If you have created multiple custom fields, then you can sequence the new fields by clicking the Sequence button on the Campaign Custom Fields list screen and by rearranging the numerical values for each.

## Localizing Custom Fields

After you have created a custom field you can localize it for the languages you use.

### To localize a custom field

1. Display the list of custom fields.
  - a. Click Admin.
  - b. In the Custom Fields section, click either Account, Campaign, or Program.
2. From the Translation Language menu, choose a language.

Custom fields that have not yet been translated display in their original language within square brackets ([ ]). For example: [Account]
3. Click the edit icon (pencil) for the custom field you want to localize.

The Custom Field - Edit screen appears.
4. Enter the localized term in the Name field and click Save.

## Creating Program Custom Fields

The Program Custom Fields section enables you to create additional fields to capture and store descriptive information for a program in addition to the information entered in standard program fields.

### To create a program custom field

1. Click Admin in the upper-right corner of the screen.
2. In the Field Management section, click Program Custom Fields.
3. In the Custom Field List screen, click Add.
4. In the Create Custom Field screen, enter the field name.
5. Choose the display type from the menu.

If you choose picklist, you are prompted to enter the picklist values.
6. (Optional) If the field is mandatory, select the Mandatory check box.
7. Enter the field description.
8. (Optional) Set a default value.
9. Click Save.

Custom fields are automatically assigned an Oracle CRM On Demand Marketing smart tag, which enables their use in templates, email messages, landing pages, and microsites. The syntax used for a new Program custom field smart tag is: `${Program.ProgramNewCustomFieldName__c}`

- Any spaces are replaced with underscores (\_).
- Characters are changed to all uppercase.
- The name is appended with two underscores and a lowercase *c*, as in: `__c`. For example, the custom field Event Date smart tag is: `${Program.EVENT_DATE__c}`.

Custom fields can be edited or deleted by clicking the Edit or Delete icons. If you have created multiple custom fields you can sequence the new fields by clicking the Sequence button on the Program Custom Fields list screen and by rearranging the numerical values for each field.



For information on localizing custom fields, see [Localizing Custom Fields](#).

## Configuring CRM Integration Management Options

Configure the following CRM integration management components:

- **Account Credentials.** For more information, see [Configuring Account Credentials](#).
- **Object Sync Configuration.** For more information, see [About Configuring Object Synchronization](#).
- **Deduping Rules.** For more information, see [Configuring Deduplication Rules](#).
- **Publish Configuration.** For more information, see [Configuring Publishing Rules](#).
- **Account Mapping.** For more information, see [Mapping Account Fields](#).
- **Lead and Contact Mapping.** For more information, see [Mapping Lead and Contact Fields](#).

### Configuring Account Credentials

Each company has its own login to Oracle CRM On Demand that can be used by Oracle CRM On Demand Marketing processes to send data to or retrieve data from Oracle CRM On Demand.

#### To configure account credentials

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Account Credentials.
3. In the Oracle CRM On Demand Account Credentials Configuration screen, enter information into the User Sign In and Password fields.

The password field does not display the password on screen.

4. Click Save.

All records that are published to Oracle CRM On Demand have the CreatedBy and lastModifiedBy assigned to the user credentials defined on this screen.

### About Configuring Object Synchronization

Oracle CRM On Demand Marketing provides you the ability to select the Oracle CRM On Demand objects that can be synchronized into Oracle CRM On Demand Marketing, and configure synchronization details. Synchronization is available for Oracle CRM On Demand objects, such as accounts, contacts, leads, and users.

For some synchronization jobs, you can provide a notification email address to inform you what objects were synchronized and if any synchronization failed.

For more information on synchronizing and publishing, see [About Synchronizing and Publishing Data](#).

#### To configure object synchronization

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Object Synchronization Configuration.

3. In the CRM Object Synchronization Configuration screen, select the Oracle CRM On Demand objects that can be synchronized into Oracle CRM On Demand Marketing.
4. (Optional) For contact and lead objects you can filter which records are synchronized by clicking Configure Filter.

For more information, see [Displaying the Contact Synchronization Filter](#) and [Displaying the Lead Synchronization Filter](#).

5. Click Save.

## Displaying the Contact Synchronization Filter

The Contact Synchronization Filter page lists the currently active and pending filters. You can have only one active filter at a time. The pending filter replaces the active filter after it has been activated by Oracle Customer Care.

These filters affect which records are synchronized from Oracle CRM On Demand to Oracle CRM On Demand Marketing. This is a one-way filter, it affects only which records in Oracle CRM On Demand are copied into Oracle CRM On Demand Marketing. The synchronization usually happens once each day, usually during the late evening hours.

For the active filter you can get a count of the number of contacts that pass through the filter, and can display the filter history. The filter history information includes the activation date, the synchronization date, and the filter parameters.

For the pending filter you can get a count of the number of contacts that pass through the filter, and can preview this list of contacts. This count returns the number of Oracle CRM On Demand contacts that match the filter criteria. If the Re-run Initial Synch option is selected, then the count indicates the number of contacts that match the filter criteria since the specified initial synchronization date. If the Re-run Initial Synch option is not selected, then the count indicates the number of contacts that match the filter criteria only for the contacts that were created or modified since the last successful incremental synchronization, which may be just a day earlier.

To create a new filter, click Configure. For more information, see [Configuring the Contact Synchronization Filter](#).

## Configuring the Contact Synchronization Filter

When you configure a new filter it is to be a replacement for the currently active filter. Your newly configured filter appears in the pending filter list. It does not become the active filter until it is activated by Oracle Customer Care.

For more information on synchronizing and publishing, see [About Synchronizing and Publishing Data](#).

### To configure the contact synchronization filter

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Object Synchronization.
3. In the Oracle CRM On Demand Object Synchronization screen, click Configure Filter next to the Contact object.
4. Click Configure.
5. In the Attribute drop-down menu, choose a field.

6. In the Operator drop-down menu, choose an operator.
7. In the Value drop-down menu, choose a value.  
To choose multiple values, use shift-click to specify a range of values, and control-click to choose individual items from the list.
8. (Optional) To synchronize contacts that have been created or modified prior to the previously successful synchronization enable the Re-run Initial Synch option and select a date.  
Contacts that have been created or modified since the specified date and match the filter criteria are synchronized with Oracle CRM On Demand Marketing.
9. Click Save.

## Displaying the Lead Synchronization Filter

The Lead Synchronization Filter page lists the currently active and pending filters. You can have only one active filter at a time. The pending filter replaces the active filter after it has been activated by Oracle Customer Care.

These filters affect which records are synchronized from Oracle CRM On Demand to Oracle CRM On Demand Marketing. This is a one-way filter, it affects only which records in Oracle CRM On Demand are copied into Oracle CRM On Demand Marketing. The synchronization usually happens once each day, usually during the late evening hours.

For the active filter you can get a count of the number of leads that pass through the filter, and can display the filter history. The filter history information includes the activation date, the synchronization date, and the filter parameters.

For the pending filter you can get a count of the number of leads that pass through the filter, and can preview this list of leads. This count returns the number of Oracle CRM On Demand leads that match the filter criteria. If the Re-run Initial Synch option is selected, then the count indicates the number of leads that match the filter criteria since the specified initial synchronization date. If the Re-run Initial Synch option is not selected, then the count indicates the number of leads that match the filter criteria only for the leads that were created or modified since the last successful incremental synchronization, which may be just a day earlier.

To create a new filter, click Configure. For more information, see [Configuring the Lead Synchronization Filter](#).

## Configuring the Lead Synchronization Filter

When you configure a new filter it is to be a replacement for the currently active filter. Your newly configured filter appears in the pending filter list. It does not become the active filter until it is activated by Oracle Customer Care.

For more information on synchronizing and publishing, see [About Synchronizing and Publishing Data](#).

### To configure the lead synchronization filter

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Object Synchronization.
3. In the Oracle CRM On Demand Object Synchronization screen, click Configure Filter next to the Lead object.

4. Click Configure.
5. In the Attribute drop-down menu, choose a field.
6. In the Operator drop-down menu, choose an operator.
7. In the Value drop-down menu, choose a value.  
To choose multiple values, use shift-click to specify a range of values, and control-click to choose individual items from the list.
8. (Optional) To synchronize leads that have been created or modified prior to the previously successful synchronization enable the Re-run Initial Synch option and select a date.  
Leads that have been created or modified since the specified date and match the filter criteria are synchronized with Oracle CRM On Demand Marketing.
9. Click Save.

### **Activating Synchronization Filters**

When you have configured contact or lead filters, you must activate them by contacting Oracle Customer Care and creating a service request.

If this is your initial account configuration, then Oracle Customer Care activates the filter and runs the initial synchronization of the data. This job uses your filter and synchronizes only that data.

If the initial synchronization job has already been completed and you change your filter specifications, and if you had specified the Re-run Initial Synch option, then the job synchronizes the contacts and leads that have been created or modified after the specified date. Oracle CRM On Demand Marketing does not delete prior synchronized contacts and leads that do not match the new filter. To remove the nonmatching records, use the Bulk Contact delete utility.

## **Configuring Deduplication Rules**

Before publishing a new record, Oracle CRM On Demand Marketing checks for an existing lead or contact in Oracle CRM On Demand. The new record is based on the rules defined in the CRM DeDuping Rules Configuration section.

Oracle CRM On Demand Marketing performs the following:

1. Checks for contacts first and then leads
2. Deduplication Engine executes these deduplication rules in the order of sequence and merges the data if a matching lead or contact is found.

You can define the deduplication rules for each entity and also define the order of precedence for the rules.

The following can happen:

- If a matching record is not found, a new lead is created in Oracle CRM On Demand.
- If a matching record is found, Oracle CRM On Demand Marketing updates the existing record.

### **To configure deduplication rules**

1. In the CRM Integration Management section, click Deduping Rules.
2. In the CRM DeDuping Rules Configuration screen, click Start.

3. To sequence the existing deduplication rules, do the following:
  - a. Click Sequence.
  - b. Select one of the following options:
    - First Contact, Then Lead
    - First Lead, Then Contact
4. Click Save.
5. To configure the deduplication rules, do the following:
  - a. Click Configure for a lead or contact that you want to edit.  
A list of attributes for the lead or contact appears.
  - b. Select the attributes to add a new deduplication rule, then click Add.  
A new rule is added to any existing rules.
  - c. To sequence the order of the rules with the new rule included, click Sequence.
  - d. Click Back.
6. To edit the deduplication rules, do the following:
  - a. Click Edit for the deduplication rule that you want to edit.  
A list of attributes for the lead or contact appears.
  - b. Select the attributes that you want to add a new deduplication rule to, then click Add.  
A new rule is added to any existing rules.
  - c. To sequence the order of the rules with the new rule, click Sequence.
  - d. Click Back.
7. To delete any unnecessary rules, click the Delete button.

## Configuring Publishing Rules

Oracle CRM On Demand Marketing enables you to define all business rules, which a company administrator configures to publish data to Oracle CRM On Demand. Business rules work only with Oracle CRM On Demand. When any contact or lead is published to Oracle CRM On Demand but already exists, the following rules manage the merging and overwriting of the existing data in Oracle CRM On Demand. You can configure publishing rules for the following items:

- Lead
- Contact
- Campaign
- Campaign activity

For more information on synchronizing and publishing, see [About Synchronizing and Publishing Data](#).

### To select publishing rules that you want to configure

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Publish Configuration.

The CRM Publish Rules Configuration screen appears.

3. On the CRM Publish Rules Configuration screen, select the check box for the items you want to publish, and click Save.

The following procedure shows you how to configure CRM Publishing Rules. If you want to publish the Campaign Fields Total Emails Sent or Total Emails Delivered, you must first map custom fields for them. For more information on adding custom fields to the Campaign object, see [Creating Campaign Custom Fields](#).

#### **To configure CRM publishing rules**

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Publish Configuration.

The CRM Publish Rules Configuration screen appears.

3. For the option, Publish Lead, do the following:
  - a. Click Configure Details.
  - b. Select or deselect the following options as necessary:
    - For the option, Update Blank Lead Fields, select it to update the existing blank fields in the lead record with new values available in the latest lead or prospect record published to Oracle CRM On Demand.
    - For the option, Over-write Conflicting Lead Fields, select it to update the existing fields with values in the lead record with new values available in the latest prospect record published to Oracle CRM On Demand.
    - For the option, Assign Campaign To Lead, select it to assign a program name to the lead record showing that the lead record was created or updated because of a response to a specific marketing program.
    - For the option, Append unmapped Lead fields to field, select the field from the menu to which the unmapped attributes will be published. The default field for this option is Description.
    - For the option, Publish Marketing Score to field, select the field from the menu to which the marketing score will be published.
    - For the option, Publish Lead Source, select the field from the menu to which the lead source will be published.
    - For the option, Publish Specific Lead Source, select the field from the menu to which the specific lead source will be published.
  - c. Click Save.
4. For the option, Publish Contact, do the following:
  - a. Click Configure Details.
  - b. Select or deselect the following options as necessary:
    - To update contact records with published data, select the Update Contact check box and use the fields below it to configure the conditions under which a contact record is updated.
    - For the option, Update Blank Contact Fields, select it to update the existing blank fields in the contact record with new values available in the latest contact record published to Oracle CRM On Demand.

- For the option, Over-write Conflicting Contact Fields, select it to over-write the existing fields with values in the contact record with new values available in the latest contact record published to Oracle CRM On Demand.
- For the option, Assign Campaign To Contact, select it to assign the program name to the contact record showing that the contact record was created or updated because of a response to a specific marketing program.
- For the option, Append unmapped Contact fields to field, select the field from the menu to which the unmapped contact fields will be published. The default field for this option is Description.
- For the option, Publish Marketing Score to field, select the field from the menu to which the marketing score will be published.
- To create lead records from published contacts, select the Create a Lead check box. All leads created are associated to the existing contact.
- For the option, Associate Lead to Primary Account of Contact, select it to assign the newly created lead to the contact's primary account.

For more information on contacts and leads, see [About Synchronizing and Publishing Data](#)

c. Click Save.

5. For the option, Publish Campaign, do the following:

- a. Click Configure Details.
- b. Click Edit.

A list of attributes are listed in the field columns.

- c. Select the Publish while Create column and Publish while Update column to specify which fields must be synchronized while creating and updating rules.
- d. Select the update rule for each field:
  - **Update if Blank.** The Oracle CRM On Demand field is updated with the value from Oracle CRM On Demand Marketing only if it is blank.
  - **Overwrite.** The Oracle CRM On Demand field is overwritten with the value from Oracle CRM On Demand Marketing.
  - **Do not Update.** The Oracle CRM On Demand field is not updated.

The settings to publish all fields are selected by default. The menu, Update Menu Update if Blank, is selected as the default menu.

e. Click Next, and then click Save.

6. For the option, Publish Campaign Activity, do the following:

- a. Click Configure Details.
- b. On the Campaign Activity Publish Configuration screen, select the activities associated with the Contact and Lead objects that you want to publish:
  - Email Opened
  - Click Through
  - Registered (Responded)
  - Attended

- Download
- Website Activity
- Total Emails Sent
- Total Emails Delivered

The Total Emails Sent and Total Emails Delivered are published as aggregate counts to fields that you have mapped in the Oracle CRM On Demand's Campaign record type.

You must first map custom fields for publishing these aggregate counts. For more information on adding custom fields to the Campaign object, see [Creating Campaign Custom Fields](#).

- c. For the options Total Emails Sent and Total Emails Delivered, choose a field to which the values will be published.
  - d. In the creating a new lead section, enter a value for the number of days of the campaign or Web site history that you want to publish.
  - e. Select the activity types for which you want to restrict publishing, and click Save.
7. Click Save.

## Mapping Account Fields

You can map both Oracle CRM On Demand Marketing account fields to Oracle CRM On Demand account fields.

### To map account fields

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Account Mapping.  
The Oracle CRM On Demand screen appears. By default, a list of Oracle CRM On Demand fields appears.
3. Select the Oracle CRM On Demand fields that you want to map with Oracle CRM On Demand Marketing attributes.
4. Click Map Fields.
5. In the Oracle CRM On Demand mapping screen, click Search, and then select the Oracle CRM On Demand Marketing attribute that you want to map.
6. Click Save.

## Mapping Lead and Contact Fields

You can map both Oracle CRM On Demand Marketing lead and contact fields to Oracle CRM On Demand fields.

### To map lead and contact fields

1. Click Admin in the upper-right corner of the screen.
2. In the CRM Integration Management section, click Lead/Contact Mapping.  
The Oracle CRM On Demand screen appears. By default, a list of Oracle CRM On Demand fields appears.



3. Select the Oracle CRM On Demand fields to map with Oracle CRM On Demand Marketing attributes.
4. Click Map Fields.
5. In the Oracle CRM On Demand mapping screen, click Search and then select the Oracle CRM On Demand Marketing attribute to be mapped.
6. Click Save.

## About Synchronizing and Publishing Data

Both Oracle CRM On Demand and Oracle CRM On Demand Marketing have their own separate databases. They share data using the processes of synchronization and publication.

*Synchronization* is the process of copying data from Oracle CRM On Demand to Oracle CRM On Demand Marketing. Synchronization happens nightly at a time that is coordinated between your company and Oracle. The data that is copied includes object definitions (such as field names and specifications) and data records (contacts, leads, and so on).

For more information on synchronization, see the following:

- [About Configuring Object Synchronization](#)
- [Configuring the Contact Synchronization Filter](#)
- [Configuring the Lead Synchronization Filter](#)

*Publication* is the process of copying data from Oracle CRM On Demand Marketing to Oracle CRM On Demand. Publishing happens in near real-time as records are added or updated in Oracle CRM On Demand Marketing. Only records are published. For more information about configuring publishing, see [Configuring Publishing Rules](#).

Because Oracle CRM On Demand and Oracle CRM On Demand Marketing are separate applications they have a few differences in terminology. In Oracle CRM On Demand Marketing, a campaign is a top-level object that contains programs. Oracle CRM On Demand does not have the same hierarchy in that it does not have a concept of programs. In Oracle CRM On Demand, a campaign is the equivalent of an Oracle CRM On Demand Marketing program. Thus as data is synchronized and published, Oracle CRM On Demand campaign data is exchanged with Oracle CRM On Demand Marketing program data.

Similarly, contacts and leads are not the same between Oracle CRM On Demand and Oracle CRM On Demand Marketing. In Oracle CRM On Demand, contacts and leads are separate objects. In Oracle CRM On Demand Marketing, there is only a contact object. All Oracle CRM On Demand contacts and leads synchronized to Oracle CRM On Demand Marketing appear as contacts. When Oracle CRM On Demand Marketing publishes contacts to Oracle CRM On Demand, it updates the original contact or lead record. If an Oracle CRM On Demand Marketing contact does not exist as a contact or lead in Oracle CRM On Demand, then it is published as a CRM lead. In Oracle CRM On Demand a contact is defined as being associated with an account or an opportunity. A new Oracle CRM On Demand Marketing contact has no associations in Oracle CRM On Demand, so it must be published as a lead.

When data (such as object definitions or records) are deleted in Oracle CRM On Demand, they are not deleted in Oracle CRM On Demand Marketing because that data may be in use in an active campaign, program, or other object. Deleting the data may adversely affect something that is currently active, so no such deletions occur in Oracle CRM On Demand Marketing. Instead, the records are marked as inactive.

## Using Custom Objects

Oracle CRM On Demand Marketing provides support for custom objects, which enables you to model data that is not available in the standard application. Oracle Customer Care handles the creation of custom objects. You cannot create them directly in Oracle CRM On Demand Marketing. Custom objects have the following features:

- **One to many relationship with marketing contacts.** Each marketing contact in Oracle CRM On Demand Marketing can be associated with multiple custom object rows for a given custom object. A custom object cannot be associated with entities other than Contact.
- **Import utility.** Custom objects can be imported using the import utility. Imports can be one-time or recurring on a defined schedule.
- **Custom objects for list segmentation.** Custom object data can be used for list segmentation. Custom objects appear under the list segmentation user interface as a separate profile.
- **Custom objects for response management.** Custom object data can be used across all response management and queue assignment rules in regards to suppression, scoring, and queue assignment.
- **Custom objects with nurture campaigns.** Custom object data can be used in conditions for workflow and adaptive campaigns.

To create a custom object, provide the following information to Oracle Customer Care:

- **Object name.** The name of the custom object.
- **List of attributes.** A list of custom object attributes. For each attribute, provide the following information.
  - **Attribute name.** The name of the attribute.
  - **Data type.** The data type of the attribute. The following table shows the available data types:

Data Type	Description
Text Area (255)	A text value up to 255 characters
Text Area (2000)	A text value up to 2000 characters
Number	A valid integer value
Decimal	A valid decimal value
Check box	A Boolean value
Percent	A valid numeric value
URL	A valid Web link
Date	A date value only
Date/Time	A timestamp value with the date and time
Picklist	A picklist with a predefined list of values

- **Mandatory flag.** A flag indicating whether the attribute is mandatory
- **Primary key flag.** A flag indicating whether the attribute is part of the custom object primary key
- **Default value.** The default value for the attribute

- **List of values.** A list of values for attributes of type Picklist

## Configuring My Setup Options

You can modify or update your profile.

### To modify or update the profile

1. Click My Setup in the upper-right corner of the screen.
2. Click User Profile.
3. Edit the necessary fields and click Save.

## About Your User Profile

Some fields are listed for display only and are edited in Oracle CRM On Demand. You can edit the following fields in Oracle CRM On Demand Marketing:

- **From Address Name.** This field sets the name to be used when sending email.
- **From Address Email.** This field sets the email address to be used when sending email.
- **Image URL.** This field sets an image to appear in your email signature block.
- **Website URL.** This field sets the URL of your Web site to be included in your email signature block.
- **Chat URL.** This field sets the URL of your chat service to be included in your email signature block.
- **Email Signatures.** You can customize outbound emails to include your email signature or the email signature of another profile.
- **Pagination.** This field sets the number of records to be displayed on a page on all main list screens and search results screens, for example, records on a page: 10, 25, 50, 75, and 100.



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