
PeopleSoft CRM 9.1 Marketing Applications PeopleBook

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Oracle's PeopleSoft CRM Marketing Applications Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft automation and configuration tools.
- PeopleSoft business object management.
- PeopleSoft product and item management.
- PeopleTools PeopleBooks.

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

PeopleSoft Application Fundamentals

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.
This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.
- Workforce Management.
This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.
- Interactions and 360-Degree Views.
This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.
- Self-Service for Customers.
This part discusses how to set up, administer, and use self-service applications for customers and workers.
- Relationship Management.
This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

PeopleSoft Automation and Configuration Tools

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management.

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

- Automation Tools.

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

- Configuration Tools.

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

- Knowledge Management.

This part discusses the setup of Verity search.

- Business process management.

This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

- The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
- The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
- The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
- The setup and execution of business projects.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook

PeopleSoft Business Object Management

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft CRM 9.1 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics.

This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook

PeopleSoft Product and Item Management

The *PeopleSoft CRM 9.1 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Oracle's PeopleSoft CRM Product and Item Management Preface"

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.52 PeopleBooks.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft Marketing

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

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

PeopleSoft CRM Marketing Overview

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

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

See Also

PeopleSoft Online Marketing 9.1 PeopleBook

PeopleSoft CRM Marketing Business Processes

PeopleSoft CRM Marketing applications provide the following business processes:

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

- Measure campaign results.

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

PeopleSoft CRM Marketing and TeleSales Implementation

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

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, with information on where to find the most up-to-date version of each.

See Also

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

Chapter 2

Navigating in PeopleSoft Marketing

This chapter discusses how to navigate in PeopleSoft Marketing.

Navigating in PeopleSoft Marketing

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

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

Pages Used to Navigate in PeopleSoft Marketing

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

Marketing Center

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

Page Name	Navigation	Usage
Marketing Center	Main Menu, Packaging, Marketing Center	Access primary Marketing Center menu options and activities.
Marketing Programs	Click Marketing Programs on the Marketing Center page.	Access Marketing Programs to create or edit marketing programs, such as campaigns, dialogs, or roll ups.
Advisor Workbench	Click Advisor Workbench on the Marketing Center page.	Define advisor dialogs.
Dialog Designer	Click Dialog Designer on the Marketing Center page.	Access the dialog designer to create or edit marketing dialogs.

Page Name	Navigation	Usage
Marketing Programs	Click Marketing Programs on the Marketing Center page.	View program summary information, and sort or filter by program attributes.
Outbound Calls	Click Outbound Calls on the Marketing Center page.	Conduct outbound campaigns, contact prospects, and record call outcomes.
Audiences	Click Audiences on the Marketing Center page.	Define and manage target audiences and segments.
Audience Lists	Click Audience Lists on the Marketing Center page.	Access the Audience Search page.
Audience Segments	Click Audience Segments on the Marketing Center page.	Access the Audience Search page.
Profile Definitions	Click Profile Definitions on the Marketing Center page.	Manage marketing profile definitions.
Data Import	Click Data Import on the Marketing Center page.	Import data.
Data Import Global Settings	Click Data Import Global Settings on the Data Import page.	Specify data import global settings.
Data Import Templates	Click Data Import Templates on the Data Import page.	Access data import templates.
Run Data Import	Click Run Data Import on the Data Import page.	Run the data import.
View Import Status	Click View Import Status on the Data Import page.	View import status.
Edit Matching SQL	Click Edit Matching SQL on the Data Import page.	Allow editing of Matching SQL Statements
Run Company Full-Sync	Click Run Company Full-Sync on the Data Import page.	Run Company Full Sync, publishing CDM company data to CDH.
Run Site Full-Sync	Click Run Site Full-Sync on the Data Import page.	Run Site Full Sync, publishing CDM site data to CDH.
Run Consumer Full-Sync	Click Run Consumer Full-Sync on the Data Import page.	Run Consumer Full Sync, publishing CDM consumer data to CDH.
Run Contact Full-Sync	Click Run Contact Full-Sync on the Data Import page.	Run Contact Full Sync, publishing CDM contact data to CDH.
Enterprise Content and Offers	Click Enterprise Content and Offers on the Marketing Center page.	Manage marketing collateral and setup offers.

Page Name	Navigation	Usage
Manage Offers	Click Manage Offers on the Marketing Center page.	Create offers based on product, base price, and discount information.
Marketing Collaterals	Click Marketing Collaterals on the Marketing Center page.	Manage marketing content for targeted audiences.
Analysis	Click Analysis on the Marketing Center page.	Discover and gain insights into customers, programs, and products.
Interactive Reports	Click Interactive Reports on the Analysis page.	View the Marketing Performance and Forecast Analysis.
Campaign Performance Forecast	Click Campaign Performance Forecast on the Analysis page.	View the Campaign Performance/Forecast Analysis.
Dialog Performance Forecast	Click Dialog Performance Forecast on the Analysis page.	View the Dialog Performance/Forecast Analysis.
Operational Reports	Click Operational Reports on the Analysis page.	View quality reports.
Document Responses	Click Document Responses on the Operational Reports page.	Search for document responses.
Individual Responses	Click Individual Responses on the Document Responses page.	Search for individual responses.
Overall Responses	Click Overall Responses on the Document Responses page.	Search for overall responses.
Campaign Management	Click Campaign Management on the Operational Reports page.	Request a campaign management report.
Content Management	Click Content Management on the Operational Reports page.	Request a content management report.
Campaign-Content Management	Click Campaign-Content Management on the Operational Reports page.	Request a campaign-content management report.
Campaign Effectiveness	Click Campaign Effectiveness on the Operational Reports page.	Request an effectiveness report based on business unit, status, and date range.
Campaign Expense	Click Campaign Expense on the Operational Reports page.	Request a campaign expense report.
Activity Effectiveness	Click Activity Effectiveness on the Operational Reports page.	Request an activity effectiveness report based on business unit, status, and date.
Campaign Activity Effective	Click Campaign Activity Effective on the Operational Reports page.	Request a campaign and activity report based on business unit and date range.

Page Name	Navigation	Usage
Task Management	Click Task Management on the Operational Reports page.	Request a task management report.
Campaign ROI (Return On Investment)	Click Campaign ROI on the Operational Reports page.	Request a return-on-investment report.
Campaign Count by Score	Click Campaign Count by Score on the Operational Reports page.	Request a report of campaign counts by score.

Marketing Analysis Center

The Marketing Analysis Center custom navigation pages that follow are geared toward the person in your organization who focuses on performing marketing analysis tasks:

Page Name	Navigation	Usage
Marketing Analysis Center	Main Menu, Packaging, Marketing Analysis Center	Access primary Marketing Analysis Center menu options and activities.
Marketing Programs	Click Marketing Programs on the Marketing Analysis Center page.	Manage marketing programs and activities.
Marketing Programs	Click Marketing Programs on the Marketing Programs page.	View program summary information, and sort or filter by program attributes.
Dialog Designer	Click Dialog Designer on the Marketing Programs page.	Access the dialog designer to create or edit marketing dialogs.
Advisor Workbench	Click Advisor Workbench on the Marketing Programs page.	Define advisor dialogs.
Outbound Calls	Click Outbound Calls on the Marketing Programs page.	Conduct outbound campaigns, contact prospects, and record call outcomes.
Audiences	Click Audiences on the Marketing Analysis Center page.	Define and manage target audiences and segments.
Audience Lists	Click Audience Lists on the Audiences page.	Access the Audience Search page.
Audience Segments	Click Audience Segments on the Audiences page.	Access the Audience Search page.
Profile Definitions	Click Profile Definitions on the Marketing Center page.	Manage marketing profile definitions.
Data Import	Click Data Import on the Audiences page.	Import data.

Page Name	Navigation	Usage
Data Import Global Settings	Click Data Import Global Settings on the Data Import page.	Specify data import global settings.
Data Import Templates	Click Data Import Templates on the Data Import page.	Access data import templates.
Run Data Import	Click Run Data Import on the Data Import page.	Run the data import.
View Import Status	Click View Import Status on the Data Import page.	View import status.
Edit Matching SQL	Click Edit Matching SQL on the Data Import page.	Allow editing of Matching SQL Statements
Run Company Full-Sync	Click Run Company Full-Sync on the Data Import page.	Run Company Full Sync, publishing CDM company data to CDH.
Run Site Full-Sync	Click Run Site Full-Sync on the Data Import page.	Run Site Full Sync, publishing CDM site data to CDH.
Run Consumer Full-Sync	Click Run Consumer Full-Sync on the Data Import page.	Run Consumer Full Sync, publishing CDM consumer data to CDH.
Run Contact Full-Sync	Click Run Contact Full-Sync on the Data Import page.	Run Contact Full Sync, publishing CDM contact data to CDH.
Customer Behavior Modeling	Click Customer Behavior Modeling on the Marketing Analysis Center page.	Consolidate customer data across the enterprise. Build and use predictive models and scores.
Marketing Analysis	Click Marketing Analysis on the Marketing Analysis Center page.	Discover and gain insight into customers, programs, and products.
Operation Reports	Click Operation Reports on the Marketing Analysis page.	View quality reports.
Document Responses	Click Document Responses on the Operation Reports page	View individual and overall responses.
Individual Responses	Click Individual Responses on the Document Responses page.	Search for individual responses.
Overall Responses	Click Overall Responses on the Document Responses page.	Search for overall responses.
Campaign Management	Click Campaign Management on the Operation Reports page.	Request a campaign management report.
Content Management	Click Content Management on the Operation Reports page.	Request a content management report.

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

Chapter 3

Defining PeopleSoft Marketing Business Units

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

Understanding PeopleSoft Marketing Business Units

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

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

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

You also filter results in PeopleSoft Marketing by business unit.

Defining PeopleSoft Marketing Business Units

This section discusses how to define PeopleSoft Marketing business units.

Page Used to Define PeopleSoft Marketing Business Units

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Marketing Definition	RA_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Marketing Definition	Define PeopleSoft Marketing business units.

Defining PeopleSoft Marketing Business Units

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

Access the Marketing Definition page (Set Up CRM, Business Unit Related, Marketing Definition).

Marketing Definition page

Default SetID

Select the default setID to associate with the business unit.

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

Currency Code

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

Sales Business Unit

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

Printer

Select a printer name for correspondence management.

Create Business Unit

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

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

Chapter 4

Setting Up PeopleSoft Marketing and TeleSales

This chapter provides an overview of Customer Data Hub (CDH) impact on PeopleSoft Marketing and discusses how to:

- Set CRM (Customer Relationship Management) application security for PeopleSoft Marketing.
- Set dataset security for PeopleSoft Marketing.
- Set display templates for PeopleSoft Marketing and TeleSales.
- Define campaign elements.
- Define channel elements.
- Define collateral elements.
- Define offer options.
- Define and create metrics.
- Define cost elements.
- Define audience information.
- Define task tools.
- Define telesales elements.
- Define component audit information.

Understanding Customer Data Hub Impact on Marketing

This section discusses:

- Smart search functionality.
- Duplicate prevention.
- Affected features.
- Generated audience using PeopleSoft Query.

Smart Search Functionality

If you have implemented CDH, business object Search pages have a user check box option to use the Smart Search feature. These Marketing components and fields are affected:

- Marketing Programs: Sponsor, Team Member, Task Assigned To, and Task Assigned By fields.
- Collateral: Owner.
- Audiences.
- Offers.
- Marketing Calendar.

Duplicate Prevention

When Quick Create pages invoke a Business Object (BO) search for potential matches, the user can use Smart Search. If potential matches are found, they appear on the Potential Duplicates page region with a match score that shows the likelihood of the match being a duplicate. This occurs when a user creates a program sponsor on a Marketing Campaign or a team member on a Marketing Calendar.

Affected Features

When business objects that are referenced by the Marketing Programs, Offer History, Offer Partners, Notification Trigger, Marketing Audiences, and TeleSales Leads transactions are merged, any merge-from BO_IDs are replaced by the merge-to BO ID. Tasks that are associated with these transactions are similarly affected.

Note that worker BOs are not merged; therefore, only campaign sponsors and team members who have the Worker role are affected.

If a merge results in a duplicate lead within a campaign program, the RC_PROSPECT_STAT field on the duplicate lead record is set to *Done* so that the lead will not be worked on. The merge-from contact will be replaced with the merge-to contact.

The merge-from BO IDs in the audience list are replaced by the merge-to BO_IDs. If this results in a duplicate BO_ID within an audience, the duplicate is deleted from the audience list. This applies to both fixed and dynamic audiences.

When a business object identifier is inactivated as the result of a merge, the BO_ID is removed from the basic data tables.

Generated Audience Using PeopleSoft Query

If you have implemented CDH, customers that are referenced in generated audiences might be updated as the result of merging duplicate data in the CDH. If you have created queries for audience generation using PSQUERY, you must review these queries and revise them accordingly.

See Also

PeopleSoft CRM 9.1 Business Object Management PeopleBook, "Understanding Customer Data Hub Integration"

Setting Up CRM Application Security for PeopleSoft Marketing

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

- Set up a membership.
- Add a member.
- Set up a functional option group.
- Set up a security profile.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

Pages Used to Set Up CRM Application Security for PeopleSoft Marketing

Page Name	Definition Name	Navigation	Usage
Membership List	RSEC_MEMBER_SMRY	Set Up CRM, Security, CRM Application Security, Search Membership List	Set up a membership list.
Add Membership List	RSEC_ML_ROLE	Click the Edit Member List link on the Membership List page to edit the list, or click the View Role List link to view it.	Add a new membership list.
Functional Option	RSEC_FUNC_DEFN	Set Up CRM, Security, CRM Application Security, Functional Option	Use these system-delivered items as display templates.
Functional Option Group	RSEC_FUNC_GROUP	Set Up CRM, Security, CRM Application Security, Functional Option Group	Set up a functional option group for PeopleSoft Marketing users.
Security Profile	RSEC_PROFILE	Set Up CRM, Security, CRM Application Security, Search Security Profile	Create a new security profile to contain the membership list and functional option group.

Setting Up a Membership List

Access the Membership List page (Set Up CRM, Security, CRM Application Security, Search Membership List).

Membership List

Save | Search | Next | Previous | Add Membership

Membership Name Cool Solutions Consulting **Status** Active

Membership List Definition

***Name**

Description

***Status**

Security Object Partner **Type** Static

Membership List Criteria

Static list of members defined.
[View Partner List \(1\)](#)

Related Security Profile

[Customize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1 of 1](#) | [Last](#)

Profile Name	Membership List	View List	Functional Option Group	Status
Cool Solutions Consulting	Cool Solutions Consulting	Cool Solutions Consulting		Active

Membership List Details

Audit Details

Membership List page

This page includes all the roles to which PeopleSoft Marketing users will be assigned. If needed, you can use multiple membership lists.

Adding a Member

The Add Membership List page displays the security objects (role, person, partner contact, and so forth) included in this membership list. You can edit the objects.

Note. You can also view the membership list without editing.

Access the Add Membership List page (click the Edit Member List link on the Membership List page to edit the list, or click the View Role List link to view it).

Name Enter the name of the security object.

Add Role Click to add a new role to the list.

Setting Up a Functional Option Group

Access the Functional Option Group page (Set Up CRM, Security, CRM Application Security, Functional Option Group).

Functional Option Group

Save | Search | Next | Previous | Refresh | Add Option Group

Functional Option Group Code MKT_ENTERPRISE **Functional Option Group** Un-Secured Marketing Fields

Functional Option Definition

***Functional Option Group** Un-Secured Marketing Fields

Description No Security for the enterprise users

Functional Options Customize | Find | First 1-2 of 2 Last

Functional Option
Amount Related

*Functional Option	Option Value	Revoke	
Marketing Display Only Fields	▼	<input type="checkbox"/>	
Marketing Hidden Fields	▼	<input type="checkbox"/>	

Add Functional Option

Audit Details

Save
Return to Search
Previous in List
Next in List

Add
Update/Display

Functional Option Group page

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

Setting Up a Security Profile

Access the Security Profile page (Set Up CRM, Security, CRM Application Security, Search Security Profile).

Security Profile

Save Run | Search | Next | Previous | Add Security Profile |

Security Profile Name CDC Partners Status Active

Security Profile Membership

Security Profile Definition

*Name CDC Partners *Status Active

Description

Functional Option Group

No Functional Option Groups associated to the Security Profile.

Add Functional Option Group

View List

View List	Description	Security Object	Type	Status	Last Refresh Date
CDC Partners		Customer	Static	Active	03/02/2006 10:22PM

Add View List

Audit Details

Security Profile page (1 of 2)

Security Profile

Save Run | Search | Next | Previous | Add Security Profile |

Security Profile Name CDC Partners Status Active

Security Profile Membership

Membership List

Membership List	Description	Security Object	Type	Status	Last Refresh Date
CDC Partners		Partner	Static	Active	03/02/2006 10:22PM

Add Membership List

Audit Details

Save Run | Search | Next | Previous | Add Security Profile | Top of Page

Security Profile page (2 of 2)

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

Setting Dataset Security for PeopleSoft Marketing

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

Page Used to Set Dataset Security for PeopleSoft Marketing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Dataset Rules	EOEC_DATASET	Enterprise Components, Component Configurations, Datasets, Dataset Rules Select the RA_PROGRAMS dataset.	Set dataset security for marketing programs.

Setting Dataset Rules

Access the Dataset Rules page (Enterprise Components, Component Configurations, Datasets, Dataset Rules).

Dataset Rules

Dataset Name: RA_PROGRAMS

***Description:** Marketing Programs

Dataset Rules Find | View All First 1 of 3 Last

***Rule:** All Programs + -

***Description:** All Programs

***Search Record Name:** RA_PROGRAM_TBL Master Program Table

***Status:** Active ▾

Rule Conditions

((...)	*Field Name	Operator	*Field Value))...		
▾		▾			▾	+ -

Test SQL Show SQL

Data distribution rule is valid.

Dataset Rules page

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

Setting Display Templates for PeopleSoft Marketing

This section describes how to:

- Set display templates for PeopleSoft Marketing.
- Set component configuration.

To set display templates for PeopleSoft Marketing, use the Component Configuration (RA_COMP_CFG) component.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook

Pages Used to Set Display Templates for PeopleSoft Marketing and TeleSales

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Display Template	RDT_TMPL_PAGE	Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details Select <i>Marketing</i> as the display template ID.	Set display template for marketing.
Component Configuration	RA_COMP_CFG	Set Up CRM, Product Related, Marketing, Component Configuration	Define the display templates to use when displaying the marketing components that use display templates.
System Data Option	RA_COMP_CFG	Select the System Data Option tab on the Component Configuration page.	Modify display template data.
Component Configuration	RT_COMP_CFG	Set Up CRM, Product Related, TeleSales, Component Configuration	Define the display templates to use when displaying the telesales components that use display templates.

Setting Display Templates

Access the Display Template page (Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details).

Display Template

Template ID CRM_HE	Family Higher Education Family
Description Higher Education	Component RC_AGT_CASES_PGT

Pages				
Enable	Page	Add Mode Default	Update Mode Default	Comments
<input checked="" type="checkbox"/>	Agent - My Cases - Wide	<input type="checkbox"/>	<input type="checkbox"/>	Agent - My Cases Pagelet

General Options		
Option	Value	Comments
Licensed Product Code	Service Center for Higher Ed <input type="button" value="v"/>	The Licensed Product that this template applies to.
Licensed Product Description	Service Center for Higher Ed	Type in a Description. This will be shown in User Preferences.
Pre-defined Search ID	Agent - My Cases Pagelet <input type="button" value="v"/>	Choose the search category to use for this component.
Application Set Extension	<input type="button" value="v"/>	This contains functions to handle additional business logic to be performed when the user clicks on selected tabs, hyperlinks, etc. Do not change this value unless you are familiar with this Application Class Extension.
Email Template for Case Notes	<input type="button" value="v"/>	Choose the E-mail Template that you want to use to E-mail Case Notes.
Email Template for Solutions	<input type="button" value="v"/>	Choose the E-mail Template that you want to use to E-mail Solutions.
Portal Name	EMPLOYEE <input type="button" value="v"/>	Select the Portal to use for Transferring using a Content Reference.
Portal Object Name	CR_RC_AGT_CASES_PGT_HE <input type="button" value="v"/>	Select the Content Reference to use for transfers

Display Template page

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

Setting Component Configuration for Marketing

Access the Component Configuration page (Set Up CRM, Product Related, Marketing, Component Configuration).

Component Configuration				
Display Templates				
General		System Data Option		
*Portal Name	*Component Name	*Market	*Display Template	
EMPLOYEE	RAE_EVENT_DETAIL	Global	CORE_MARKETING	
EMPLOYEE	RA_CAMPAIGN_DETAIL	Global	CORE_MARKETING	
EMPLOYEE	RA_CM_HOME_GRD	Global	CORE_MARKETING	
PARTNER	RA_CAMPAIGN_DETAIL	Global	MARKETING	
PARTNER	RA_CM_HOME_GRD	Global	MARKETING	

Component Configuration page (Marketing)

This page defines which display template to use when displaying the marketing components that use display templates. The page's information is based on the display templates that are defined by default, and the data is set up to use the default display template definitions.

Add

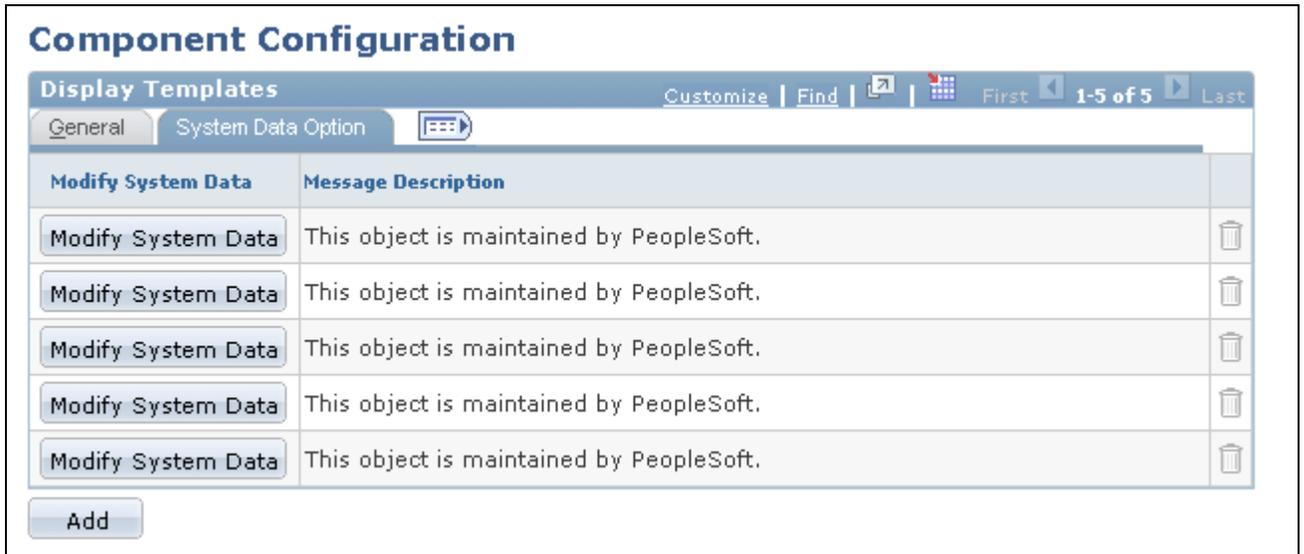
To add additional templates, click this button and then complete the necessary fields. Fields that you can added are:

- Portal Name
- Component Name
- Market
- Display Template

See *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates."

Modifying Data

Access the System Data Option page (select the System Data Option tab on the Component Configuration page).



System Data Option page

Modify System Data

Click to modify system data for the selected row. Select the General tab and modify the necessary fields. Fields that you can modify are:

- Portal Name
- Component Name
- Market
- Display Template

Setting Component Configuration for TeleSales

Access the Component Configuration page (Set Up CRM, Product Related, TeleSales, Component Configuration).



Component Configuration page (TeleSales)

This page defines which display template to use when displaying the telesales components that use display templates. The page's information is based on the display templates that are defined by default, and the data is set up to use the default display template definitions.

Add To add additional templates, click this button and then complete the necessary fields. Fields that you can added are:

- Portal Name
- Component Name
- Market
- Display Template

See *and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates."

Modifying Data

Access the System Data Option page (select the System Data Option tab on the Component Configuration page).

Modify System Data Click to modify system data for the selected row. Select the General tab and modify the necessary fields. Fields that you can modify are:

- Portal Name
- Component Name
- Market
- Display Template

Setting Component Audit Information

This section describes how to set component audit information for PeopleSoft Marketing.

Page Used to Set Component Audit Information

Page Name	Definition Name	Navigation	Usage
Component Audit	RA_UD_REQ_AUDIT	Set Up CRM, Product Related, Marketing, Component Audit	Set component audit information.

Defining Component Audit Information

Access the Component Audit page (Set Up CRM, Product Related, Marketing, Component Audit).

Component Audit

*Component

*Audit Record Name

Description

Record (Table) Name	Add	Change	Delete	
<input type="text" value="RA_CAMPAIGN"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RA_CMPGN_COST"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RA_CMPGN_METRIC"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RA_CMPGN_NOTE"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RA_CMPGN_TASK"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RA_CMPGN_WAVE"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="text" value="RA_TRIGGER"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Show Short Label Name

Component Audit page

This page controls what appears on the History page of the Marketing Program - Campaign Component page, under the Audit tab.

- Component** Select a component from the available list.
- Audit Record Name** Select an audit record from the available list.
- Record (Table) Name** Select a record from the available list.
- Add** Select this check box to display history information on the Audit History page if a new record is added.
- Change** Select this check box to display history information on the Audit History page if the record is changed.
- Delete** Select this check box to display history information on the Audit History page if the record is deleted.

If you do not want to display any audit history for a record, clear all three check boxes for that record.

Defining Campaign Elements

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

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

Understanding Campaign Elements

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

Code	Objective	Description
ACQU	Acquisition	Acquire new customers.
AWAR	Awareness	Increase awareness of your products or services within your target audiences.
CSEL	Cross Sell	Encourage members of your target audience to purchase products or services that complement those that they have already bought or intend to buy.
EVNT	Events	Host an event, such as a meeting, party, seminar, or class.
INTR	Internal	Promote interest in your products or services among members of your own organization.
LOYA	Loyalty	Encourage your target audience to make an emotional commitment to using your products or services.
PRES	Press and Analyst Relations	Communicate with journalists and others who might report on your products or services.

Code	Objective	Description
LAUN	Product Launch	Introduce new products or services.
USEL	Up Sell	Encourage your target audience members to purchase products or services that are of higher value or more expensive than those that they already intend to buy.

The following status codes are delivered:

Status Code	Status	Description
APPR	Approved	Approved by reviewer.
ARCH	Archived	Hidden from standard view. You can find archived campaigns and activities only by entering <i>Archived</i> in your search parameters.
CMPL	Completed	Ended on the established campaign end date.
DCLN	Decline	Declined by reviewer.
EXEC	Executing	<p>Being carried out.</p> <p>Before you can change a campaign or activity status to <i>Executing</i>, these three associated elements must have the following statuses:</p> <p>Collateral must have the status <i>Completed</i>.</p> <p>Offers must have the status <i>Completed</i>.</p> <p>Audiences must have the status of either <i>Approved</i> or <i>Committed</i>.</p> <p>The EXEC (executing) status drives a number of actions within PeopleSoft Marketing. For example, setting the status of a campaign to <i>Executing</i> enables you to set associated activities to <i>Executing</i> also.</p> <p>Setting an activity to <i>Executing</i> causes the system to validate any associated audiences, collateral, offers, and scripts. Associated audiences are also set to a status of <i>Committed</i>. Also, if the activity channel execution method is <i>SFA</i> or <i>TELM</i>, associated audiences' leads are pushed to the PeopleSoft Sales and PeopleSoft TeleSales applications.</p>

Status Code	Status	Description
IREV	In Review	In review.
NEW	New	Initial design phase.
STOP	Stopped	Canceled before the established campaign end date.
TRIG	Trigger Approved	Approved by the reviewer and ready to switch to <i>Execution</i> status by means of a trigger (not manually).

Pages Used to Define Campaign Elements

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

Statuses

SetID CRM01
Description Appliance

Campaign and Activity Statuses
Customize | Find | View All | [?] | [grid] | First 1-8 of 8 Last

*Campaign Status	*Description		
Approved	Approved	+	-
Completed	Completed	+	-
Declined	Declined	+	-
Executing	Executing	+	-
In Review	In Review	+	-
New	New	+	-
Stop	Stopped	+	-
Trigger Approved	Trigger Approved	+	-

* Required Field

Campaign and Activity Statuses page

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

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

Description Enter a description of the status code.

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

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

Defining Status Rules

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

Access the Status Rules page (Set Up CRM, Product Related, Marketing, Campaigns, Status Rules, Status Rules).

Status Rules

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

SetID CRM01 **Description** Appliance

Status Rules Detail						Customize	Find	View All	First	1-25 of 57	Last
*Campaign Object Type	*Status Code From	Description	*Status Code To	Description							
Campaign	APPR	Approved	EXEC	Executing	+	-					
Campaign	APPR	Approved	IREV	In Review	+	-					
Campaign	CMPL	Completed	IREV	In Review	+	-					
Campaign	DCLN	Declined	IREV	In Review	+	-					
Campaign	EXEC	Executing	CMPL	Completed	+	-					
Campaign	EXEC	Executing	STOP	Stopped	+	-					
Campaign	IREV	In Review	APPR	Approved	+	-					
Campaign	IREV	In Review	CMPL	Completed	+	-					
Campaign	IREV	In Review	DCLN	Declined	+	-					

Status Rules page (1 of 2)

Collateral	NEW	New	PLAN	Planning	+	-				
Collateral	PLAN	Planning	IREV	In Review	+	-				
Collateral	PLAN	Planning	RWRK	Re-Work	+	-				
Collateral	RWRK	Re-Work	IREV	In Review	+	-				
Collateral	RWRK	Re-Work	PLAN	Planning	+	-				
Offer	CMPL	Completed	ARCH	Archived	+	-				
Offer	IREV	In Review	CMPL	Completed	+	-				
Offer	IREV	In Review	DECL	Declined	+	-				
Offer	IREV	In Review	PLAN	Planning	+	-				

* Required Field

Status Rules page (2 of 2)

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

Oracle delivers common status rules with your Marketing system. You can add new rules as needed.

- Campaign Object Type** Select the campaign object type that the status rule governs.
Values are *Campaign, Campaign Task, Campaign Activity, Collateral, Collateral Task, Event, and Offer.*
- Status Code From and Status Code To** Select status values for before and after the change. The values that are available depend on the object type selected.

Defining Budget Sources

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

Access the Budget Sources page (Set Up CRM, Product Related, Marketing, Campaigns, Budget Sources, Budget Sources).

*Budget Source	*Description		
GENL	General Budget	+	-
LOYT	Loyalty Budget	+	-
MISC	Miscellaneous Budget	+	-
MKTG	Marketing Budget	+	-
RETN	Retention Budget	+	-

* Required Field

Budget Sources page

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

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

Defining Program Control

Access the Program Control page (Set Up CRM, Product Related, Marketing, Campaigns, Program Control, Program Control).

Program Control

Program Type Campaign

Program Control Components

Menu Name	<input type="text" value="RA_CAMPAIGN_MANAGEMENT"/>		
Menu Bar Name	<input type="text" value="USE"/>		
Item Name	<input type="text" value="RA_CAMPAIGN_DETAIL"/>		Component: RA_CAMPAIGN_DETAIL
Transfer Page	<input type="text" value="RA_CAMPAIGN_DETAIL"/>		
Transfer Mode	<input type="text" value="Update/Display"/>		

Control Details

Program Image	<input type="text" value="PS_CAMPAIGN_ICN"/>		
Activity Image	<input type="text" value="PS_CAMPAIGN_WAVE_ICN"/>		

Program Control page

- | | |
|-----------------------|--|
| Program Type | Select <i>Campaign</i> , <i>Roll Up</i> , or <i>Dialog</i> . |
| Menu Name | Do not modify this field; the menu name item is delivered as part of your system data. |
| Menu Bar Item | Do not modify this field; the menu bar item is delivered as part of your system data. |
| Item Name | Do not modify this field; the item name item is delivered as part of your system data. |
| Transfer Page | Do not modify this field; the transfer page item is delivered as part of your system data. |
| Transfer Mode | Do not modify this field; the transfer mode item is delivered as part of your system data. |
| Program Image | Use this button in conjunction with marketing programs. You can replace it with a different image. |
| Activity Image | Use this button in conjunction with activities. You can replace it with a different image. |

Defining Trigger Schedules

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

Access the Trigger Schedules page (Set Up CRM, Product Related, Marketing, Campaigns, Trigger Schedules, Trigger Schedules).

Trigger Schedules

SetID SHARE	Description SHARE
Schedule ID DAILY	

Schedule

*Description

Comment

Frequency

Month of the Year

Day of Week

Day of the Month Last Day of the Month

Days of the Week

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Months

January February

March April

May June

July August

September October

November December

* Required Field

Trigger Schedules page

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

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

Description Enter a full description of the campaign trigger schedule.

Frequency

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

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

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

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

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

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

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

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

User-Defined: This value is reserved for future use.

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

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

Note. Select *Weekly* to check campaign conditions only once a week. The schedule ID is free-form: you can use any name, but you should use something descriptive. For example, you might give the name W-FRI to a schedule that is to be run weekly every Friday.

Month of the Year

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

Day of Week

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

Day of the Month

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

Last Day of the Month	Select when the system is to check campaign conditions on the last day of the month (February 28, April 30, July 31, and so forth). This field is available only when you select <i>Monthly</i> in the Frequency field.
Days of the Week	Select the days of the week on which the system is to check campaign conditions. This field is available only when you select <i>Daily</i> in the Frequency field.
Months	Select the months in which the system is to check campaign conditions each year. This field is available only when you select <i>Monthly</i> in the Frequency field.

Defining Channel Elements

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

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

Understanding Channel Elements

Oracle delivers the following activity codes with the system. You can add additional values:

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

Pages Used to Define Channel Elements

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

Defining Channel Activities

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

Access the Channel Activities page (Set Up CRM, Product Related, Marketing, Channels, Activities, Channel Activities).

Activities

SetID SHARE Description SHARE

Channel Activities Customize | Find | View All | [Icons] | First 1-6 of 6 Last

*Activity Code	*Description		
<input type="text" value="BCST"/>	<input type="text" value="Broadcast"/>	+	-
<input type="text" value="DRCT"/>	<input type="text" value="Direct"/>	+	-
<input type="text" value="EVNT"/>	<input type="text" value="Event"/>	+	-
<input type="text" value="INBD"/>	<input type="text" value="In Bound"/>	+	-
<input type="text" value="INTR"/>	<input type="text" value="Internal"/>	+	-
<input type="text" value="PRNT"/>	<input type="text" value="Print"/>	+	-

* Required Field

Channel Activities page

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

Activity Code Enter a code that identifies the channel activity.

Description Enter a description of the channel activity.

Defining Marketing Channels

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

Access the Marketing Channels page (Set Up CRM, Product Related, Marketing, Channels, Marketing Channel).

Marketing Channels

SetID SHARE	Description SHARE	
Activity DRCT	Description Direct	

Marketing Channels			Customize Find View All [Icons] First 1-4 of 4 Last
*Channel ID	*Description	Channel Execution	
MAIL	Mail	Mail Correspondence	+... -
ORDC	Order Capture	Order Capture	+... -
SFA	Sales Agents	Sales Force	+... -
TELM	TeleSales	TeleSales	+... -

* Required Field

Marketing Channels page

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

Channel ID Enter a code that identifies the marketing channel.

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

Channel Execution

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

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

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

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

TeleSales: Select to perform the marketing activity through PeopleSoft TeleSales. When an activity is set to *Executing*, the audience associated with the campaign activity is pushed to the PeopleSoft TeleSales application as a group of telesales leads.

Advisor/Cross Sell: Allows for performance of marketing activities in cross-sell situations.

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

Defining Channel Details

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

Access the Channels page (Set Up CRM, Product Related, Marketing, Channels, Channels, Channel Details).

SetID	SHARE	Description	SHARE
Activity	BCST	Description	Broadcast
Marketing Channel	RADI	Description	Radio Stations

Channel Details		Customize	Find	View All	First	1-2 of 2	Last
*Channel Detail	*Description						
CBS	CBS Radio						
WGN	WGN Radio						

* Required Field

Channels page

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

Channel Detail Enter a code that identifies the channel.

Description Enter a description of the specific media outlet.

See Also

Chapter 9, "Creating Campaigns and Activities," Defining Activities, page 159

Defining Collateral Elements

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

This section discusses how to:

- Define collateral types.
- Define collateral subtypes.

Note. Collateral type and collateral subtype are included for reporting organizational purposes and are fully modifiable: no system requirements exist for the codes, so you can define them as you want.

Pages Used to Define Collateral Elements

Page Name	Definition Name	Navigation	Usage
Types	RA_UD_CONT_TYPE	Set Up CRM, Product Related, Marketing, Collateral, Types, Collateral Types	Define collateral types.
Sub Types	RA_UD_CNT_STYPE	Set Up CRM, Product Related, Marketing, Collateral, SubTypes, Sub Types	Define collateral subtypes.

Defining Collateral Types

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

Access the Types page (Set Up CRM, Product Related, Marketing, Collateral, Types, Types).

Types

SetID SHARE Description SHARE

Collateral Types Customize | Find | View All | [Print] [Grid] First 1-9 of 9 Last

*Collateral Type	*Description		
CTY	County Fair	+...	-
DELV	Deliverable	+...	-
DRCT	Direct Marketing	+...	-
EVNT	Event	+...	-
PRES	Press/Analyst	+...	-
PUBL	Publishing	+...	-
TOOL	Sales Tools	+...	-
WEB	Web	+...	-

* Required Field

Types page

Use collateral types to define broad categories of collateral.

Collateral Type Enter a code that identifies the collateral type.

Description Enter a description of the collateral type.

Defining Collateral Subtypes

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

Access the Sub Types page (Set Up CRM, Product Related, Marketing, Collateral, SubTypes, SubTypes).

Sub Types

SetID SHARE	Description SHARE
Collateral Type DELV	Description Deliverable

Collateral Subtypes Customize | Find | View All | First 1-7 of 7 Last

*Collateral SubType	*Description		
CD	CD	+	-
DATA	Data Sheet	+	-
EXOV	Executive Overview	+	-
GEOV	General Overview	+	-
STRY	Success Story	+	-
VALU	Value Proposition	+	-
WPAP	White Paper	+	-

* Required Field

Sub Types page

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

Collateral SubType Enter a code that identifies the collateral subtype.

Description Enter a description of the specific collateral subtype.

Defining Offer Options

This section discusses how to:

- Define offer context.
- Define offer options.

Pages Used to Define Offer Options

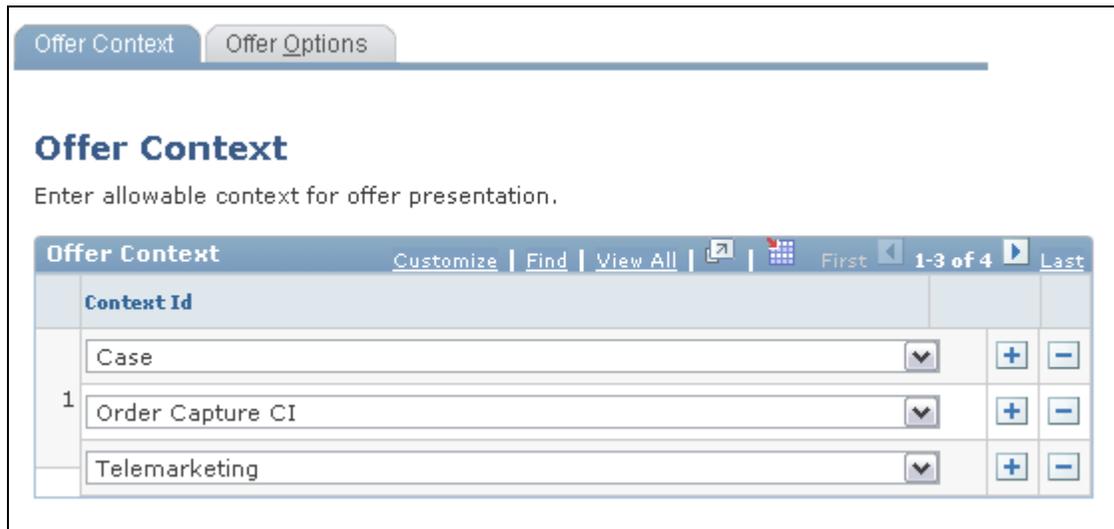
Page Name	Definition Name	Navigation	Usage
Offer Context	RA_CONTEXT_SETUP	Set Up CRM, Product Related, Marketing, Offers, Offer Options	Use to enter allowable context for offer presentation.

Page Name	Definition Name	Navigation	Usage
Offer Options	RA_OFFER_OPTION	Set Up CRM, Product Related, Marketing, Offers, Offer Options, Offer Options	Use to select whether to use third-party optimization with offers.

Defining Offer Context

To define offer options, use the Offer Options (RA_OFFER_OPTIONS) component.

Access the Offer Context page (Set Up CRM, Product Related, Marketing, Offers, Offer Options).

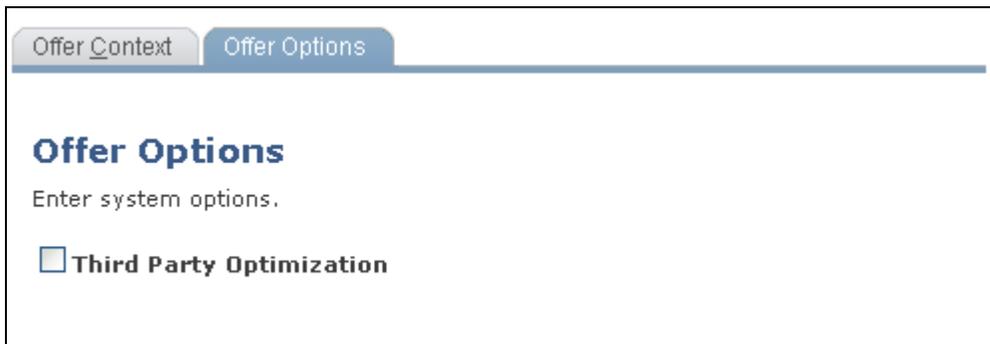


Offer Context page

Context Id The identifier for the allowable context for offer presentation.

Defining Offer Options

Access the Offer Options page (Set Up CRM, Product Related, Marketing, Offers, Offer Options, Offer Options).



Offer Options page

Third Party Optimization Select if you will use a third-party optimization engine for offer presentation.

Defining and Creating Metrics

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

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

Understanding Metrics

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

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

PeopleSoft Marketing is delivered with the following predefined metrics:

<i>Metric Name</i>	<i>Description</i>	<i>Unit of Measure</i>
Contact Rates – TeleSales	Campaign activity level	Percentage
Conversion Rates – TeleSales	Campaign activity level	Percentage
Cost	Campaign activity level	Currency amount

Metric Name	Description	Unit of Measure
Cost	Campaign level	Currency amount
Cost	Roll up level	Currency amount
Cost per Lead	Campaign activity level	Currency amount
Cost per Lead	Campaign level	Currency amount
Cost per Lead	Roll up level	Currency amount
Cost per Quote	Campaign activity level	Currency amount
Cost per Quote	Campaign level	Currency amount
Cost per Quote	Roll up level	Currency amount
Do Not Call Rate – TeleSales	Campaign activity level	Percentage
"Do Not Contact" Responses	Roll up level	Count
Lead to Quote ratio	Campaign activity level	Percentage
Lead to Quote ratio	Campaign level	Percentage
Lead to Quote ratio	Roll up level	Percentage
Number of Leads	Campaign activity level	Count
Number of Leads	Campaign level	Count
Number of Leads	Roll up level	Count
Number of Opportunities	Campaign activity level	Count
Number of Opportunities	Campaign level	Count

<i>Metric Name</i>	<i>Description</i>	<i>Unit of Measure</i>
Number of Opportunities	Roll up level	Count
Number of Quotes	Campaign activity level	Count
Number of Quotes	Campaign level	Count
Number of Quotes	Roll up level	Count
Number of Responses	Campaign activity level	Count
Number of Responses	Campaign level	Count
Number of Responses	Roll up level	Count
Opportunity Rate – TeleSales	Campaign activity level	Percentage
Opportunity to Quote ratio	Campaign activity level	Percentage
Opportunity to Quote ratio	Campaign level	Percentage
Opportunity to Quote ratio	Roll up level	Percentage
Order Revenue	Campaign activity level	Currency amount
Order Revenue	Campaign level	Currency amount
Order Revenue	Roll up level	Currency amount
Response Rate	Campaign activity level	Percentage
Response Rate	Campaign level	Percentage
Response Rate	Roll up level	Percentage
Response Rate-Outbound Mktng (response rate-outbound marketing)	Campaign activity level	Percentage

Metric Name	Description	Unit of Measure
Revenue per Lead	Campaign activity level	Currency amount
Revenue per Lead	Campaign level	Currency amount
Revenue per Lead	Rollup level	Currency amount
Revenue per Quote	Campaign activity level	Currency amount
Revenue per Quote	Campaign level	Currency amount
Revenue per Quote	Roll up level	Currency amount
Revenue Variance	Roll up level	Currency amount
ROI (return on investment)	Campaign activity level	Currency amount
ROI (return on investment)	Campaign level	Currency amount
ROI (return on investment)	Roll up level	Currency amount

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

- Campaigns - Define Activities: Detail page.
- Campaigns - Triggers page.
- Campaigns - Performance page.
- Audiences - Costs page.
- Collateral - Costs page.

See [Chapter 9, "Creating Campaigns and Activities," Defining a Trigger, page 170.](#) and [Chapter 9, "Creating Campaigns and Activities," Measuring Campaign Effectiveness, page 181.](#) and [Chapter 7, "Using Audiences," Associating Costs with an Audience or Segment, page 119.](#) and [Chapter 9, "Creating Campaigns and Activities," Defining Activities, page 159.](#) and [Chapter 5, "Creating Campaign Collateral," Entering the Costs of Creating Collateral, page 73.](#)

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

Pages Used to Define and Create Metrics

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Metric Types	RA_UD_MET_TYPE	Set Up CRM, Product Related, Marketing, Metrics, Types, Metric Types	Define metric types.
Metric Subtypes	RA_UD_MET_STYPE	Set Up CRM, Product Related, Marketing, Metrics, SubTypes, Metric Subtypes	Define metric subtypes.
Metric Detail	RA_METRICS_SUMM	Set Up CRM, Product Related, Marketing, Metrics, Detail	View summary information about all existing metrics under a setID.
Performance Metric Details	RA_METRICS	<ul style="list-style-type: none"> To edit an existing metric, click the Metric Name link on the Metric Detail page. To create a new metric, click the Add Metric button on the Metric Detail page. 	Define and review metrics.

Defining Metric Types

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

Access the Metric Types page (Set Up CRM, Product Related, Marketing, Metrics, Types, Metric Types).

Metric Types																																																									
SetID	SHARE																																																								
Description	SHARE																																																								
<table border="1"> <thead> <tr> <th colspan="2">Metric Types</th> <th>Customize</th> <th>Find</th> <th>View All</th> <th>First</th> <th>1-5 of 5</th> <th>Last</th> </tr> <tr> <th>*Metric Type</th> <th>*Description</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>CMPG</td> <td>Campaign Level</td> <td>+...</td> <td>-</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>EVNT</td> <td>Event Level Metric</td> <td>+...</td> <td>-</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>RLUP</td> <td>Rollup Level</td> <td>+...</td> <td>-</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>SESS</td> <td>Event Session Level Metric</td> <td>+...</td> <td>-</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>WAVE</td> <td>Campaign Activity Level</td> <td>+...</td> <td>-</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Metric Types		Customize	Find	View All	First	1-5 of 5	Last	*Metric Type	*Description							CMPG	Campaign Level	+...	-					EVNT	Event Level Metric	+...	-					RLUP	Rollup Level	+...	-					SESS	Event Session Level Metric	+...	-					WAVE	Campaign Activity Level	+...	-				
Metric Types		Customize	Find	View All	First	1-5 of 5	Last																																																		
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CMPG	Campaign Level	+...	-																																																						
EVNT	Event Level Metric	+...	-																																																						
RLUP	Rollup Level	+...	-																																																						
SESS	Event Session Level Metric	+...	-																																																						
WAVE	Campaign Activity Level	+...	-																																																						
* Required Field																																																									

Metric Types page

Metric types classify the types of metrics that you create.

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

Description Enter a description of the general metric type.

Defining Metric Subtypes

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

Access the Metric Subtypes page (Set Up CRM, Product Related, Marketing, Metrics, SubTypes, Metric Subtypes).

Metric Subtypes																																	
SetID	SHARE																																
Description	SHARE																																
Metric Type	CMPG																																
Description	Campaign Level																																
<table border="1"> <thead> <tr> <th colspan="2">Metric Subtypes</th> <th>Customize</th> <th>Find</th> <th>View All</th> <th>First</th> <th>1-2 of 2</th> <th>Last</th> </tr> <tr> <th>*Metric Sub Type</th> <th>*Description</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>FINA</td> <td>Financial</td> <td>+...</td> <td>-</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>PERF</td> <td>Performance</td> <td>+...</td> <td>-</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Metric Subtypes		Customize	Find	View All	First	1-2 of 2	Last	*Metric Sub Type	*Description							FINA	Financial	+...	-					PERF	Performance	+...	-				
Metric Subtypes		Customize	Find	View All	First	1-2 of 2	Last																										
*Metric Sub Type	*Description																																
FINA	Financial	+...	-																														
PERF	Performance	+...	-																														
* Required Field																																	

Metric Subtypes page

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

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

Description Enter a description of the metric subtype.

Viewing a Summary of Existing Metrics

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

Access the Metric Detail page (Set Up CRM, Product Related, Marketing, Metrics, Detail).

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

Metric Name Displays a descriptive name of the metric.
Click to access the Performance Metric Details page, where you can edit an existing metric.

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

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

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

Add Metric Add and define additional metrics.

Creating New Metrics

Access the Performance Metric Detail page (click the Add Metric button on the Metric Detail page).

Detail	
SetID SHARE	Metric ID MET0000113
Metric Detail	
*Name	Cost per Lead
*Metric Type	Campaign Level
*Metric Sub Type	Performance
Unit Of Measure	Amt
Description	Actual Cost / total # of Leads
SQL Identifier	RA_COST_LEAD_CMPGN_METRI
*Active Status	Active
<pre> SELECT %DecDiv(SUM(A.COST) , SUM(A.LEAD_COUNT)) FROM (SELECT BUSINESS_UNIT , RA_CAMPAIGN_ID , RA_CMPGN_WAVE_ID , 0 LEAD_COUNT , SUM(RA_ACTUAL_AMT) COST FROM PS_RA_ACT_COST_VW GROUP BY BUSINESS_UNIT , RA_CAMPAIGN_ID , RA_CMPGN_WAVE_ID UNION SELECT BUSINESS_UNIT , RA_CAMPAIGN_ID , RA_CMPGN_WAVE_ID , SUM(RA_ACTUAL_AMT) , 0 FROM PS_RA_LEADS_VW GROUP BY BUSINESS_UNIT , RA_CAMPAIGN_ID , RA_CMPGN_WAVE_ID) A WHERE A.BUSINESS_UNIT = :1 AND A.RA_CAMPAIGN_ID = :2 HAVING SUM(A.LEAD_COUNT) > 0 </pre>	

Performance Metric Detail page

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

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

SetID	Displays the setID within which the metric resides.
Metric ID	Displays the system-generated code that identifies the metric.
Name	Enter a descriptive name for the metric.
Metric Type	Select the type of object to be analyzed. Values are: <ul style="list-style-type: none"> • <i>Campaign Activity Level</i> • <i>Campaign Level</i> • <i>Event Level</i> • <i>Event Session Level</i> • <i>Rollup Level</i>

Metric Sub Type	Define the nature of the analysis. Values are: <ul style="list-style-type: none"> • <i>Performance</i> • <i>Financial</i>
SQL Identifier (Structured Query Language identifier)	Select the unique identifier of the SQL object that contains the SQL statement that governs the metric's calculations.
Active Status	Select the metric's status: <i>Active</i> or <i>Inactive</i> .
SQL Stmt Text (Structured Query Language statement text)	Displays the SQL statement that governs the metric's calculations.

Defining Cost Elements

This section discusses how to:

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

Pages Used to Define Cost Elements

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

Defining Cost Types

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

Access the Cost Types page (Set Up CRM, Product Related, Marketing, Costs, Types, Cost Types).

Types

SetID SHARE Description SHARE

Cost Types Customize | Find | View All | [A] | [Grid] First 1-6 of 6 Last

*Cost Type ID	*Description		
ADMN	Administrative	+...	-
ANLY	Analysis	+...	-
CHNL	Channel	+...	-
CONT	Collateral	+...	-
FULL	Fulfillment	+...	-
LIST	Audience	+...	-

* Required Field

Cost Types page

Use cost type codes to categorize campaign costs.

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

Description Enter a description of the cost type.

Defining Costs

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

Access the Record Costs page (Set Up CRM, Product Related, Marketing, Costs, Costs).

SetID		SHARE		Description		SHARE	
Record Costs							
*Cost ID	*Description	*Cost Type	Variable				
010	External Audience	Audience	Variable			+	-
020	Processing	Audience	Variable			+	-
030	Supplementary	Audience	Fixed			+	-
040	Creative	Collateral	Fixed			+	-
050	Printing	Collateral	Variable			+	-
060	Distribution	Collateral	Variable			+	-
070	Partner	Collateral	Variable			+	-
080	Reporting & Analysis	Analysis	Variable			+	-
090	Shipping & Handling	Fulfillment	Variable			+	-
100	COGS	Fulfillment	Variable			+	-

* Required Field

Record Costs page

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

Cost ID

Enter a code that identifies the cost.

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

Description

Enter a description of the cost.

Cost Type

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

Variable

Select whether the cost is variable or fixed.

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

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

Defining Channel Costs

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

Access the Channel Cost page (Set Up CRM, Product Related, Marketing, Costs, Channel Cost).

Channel Cost

SetID SHARE	Description SHARE
Activity BCST	Description Broadcast
Marketing Channel TV	Description Television Stations
Channel Detail ABC	Description ABC

*Cost Type	Variable	Unit Cost	Forecast Value	Actual Value		
Maintenance <input type="button" value="v"/>	Variable	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Setup <input type="button" value="v"/>	Variable	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Execution <input type="button" value="v"/>	Variable	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

* Required Field

Channel Cost page

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

- Cost Type** Enter the code that identifies the category of expense to be measured.
 - Variable** When a cost ID is set up as a variable expense, an indicator appears in this check box.
 - Unit Cost** Displays the cost of a single unit of product (for example, a brochure has a unit cost of 1 USD). The total cost of purchasing brochures is determined by the quantity purchased multiplied by the unit cost.
 - Planned Cost** Enter the amount that you expect to pay for all units of the product or service to be measured (quantity multiplied by unit cost).
 - Actual Cost** Enter the amount that you actually pay for all units of the product or service.
-
- Note.** Under most circumstances, you should leave this field blank because the information is entered on the Campaign Detail - Activities page.
-

Defining Audience Information

This section discusses how to:

- Limit audience row count.
- Set up saved search audiences.

- Set up segment groups.

Pages Used to Define Audience Information

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

Limiting Audience Row Count

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

Access the Audience Setup page (Set Up CRM, Product Related, Marketing, Audiences, Audience Setup).

Audience Setup

Configure the maximum number of rows to display per Audience and to include in online correspondence requests.
The recommended maximum number of rows is 2000.

Maximum Number Of Rows

*Row Count:

Override By SetID			
*SetID	*Row Count		
<input style="width: 80%;" type="text" value="HRU01"/>	<input style="width: 50px;" type="text" value="2000"/>	+	-
<input style="width: 80%;" type="text" value="IPROD"/>	<input style="width: 50px;" type="text" value="2000"/>	+	-

* Required Field

Audience Setup page

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

Row count does not limit the actual size of an audience, only the number of rows that appear on the screen. The recommended maximum row count is 2,000.

Setting Up Saved Search Audiences

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

Access the Setup Saved Search Audience page (Set Up CRM, Product Related, Marketing, Audiences, Saved Search Audience Setup).

Saved Search Audience Setup

Search | Refresh | Add Audience Search |
Personalize

Component RD_PERSON_SEARCH **Market** Global
Page RD_PRSN_SRCH_SEC **Record** RD_PRSN_SRCH_VW

Configurable Search Definition

Description Person Search
Menu Navigation Manage Customer.Use.Person Search
(RB_MANAGE_CUSTOMER_INFORMATION.USE.RD_PERSON_SEARCH)

Enabled User Roles Customize | Find | View All | | First 1-6 of 6 Last

	Role Name	Description
1	Dialog App Admin	Dialog App Admin
2	Dialog Designer	Dialog Designer
3	Inside Sales Rep	Inside Sales Rep
4	Sales App Admin	Sales App Admin
5	Sales Manager	Sales Manager
6	UPG_ALLPAGES	ALLPAGES

Saved Audience Search Setup page (1 of 2)

Enabled Marketing/Dialog Roles	
Find View All First 1 of 3 Last	
Marketing Role Contact for a Company	Override Search Record RA_PRSN_SRCH_8
Field Mappings	
Field Name	Field Name
BO_ID	RA_PRSN_SRCH_8.BO_ID - Business Object ID
ROLE_TYPE_ID	RA_PRSN_SRCH_8.ROLE_TYPE_ID - Role Type ID
BO_REL_ID	
IND_SYSID	
COMPANY_SYSID	
BO_ID_COMPANY	
ROLE_TYPE_ID_ORG	
<input type="button" value="Modify System Data"/>	
This object is maintained by PeopleSoft.	

Saved Audience Search Setup (2 of 2)

Component	Displays the configurable search definition component.
Market	Displays the configurable search definition market.
Page	Displays the configurable search definition page.
Record	Displays the configurable search definition search record.
Description	Enter a brief description of the search.
Menu Navigation	Enter the Menu.Bar.Item name to use for transfers to the configurable search page.
Enabled User Roles	Displays the user roles that are allowed to create audiences from this configurable search page.
Enabled Marketing/Dialog Roles	Displays the Marketing/Dialog target individual roles (role/relationship) that can be extracted from the configurable search results to make up an audience list.
Override Search Record	(Optional) Select an alternate search record containing fields that are identical to the primary search record, plus any additional fields for mapping to a target type. This search record could be a view that provides additional constraints or joins to affect the search results for the audience.
Field Mappings	Displays mapping of configurable search results to audience results.

Setting Up Segment Groups

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

Access the Define Segment Group page (Set Up CRM, Product Related, Marketing, Audiences, Segment Group).

Segment Group

Define Segment Group

Segment Group ID DEFAULT

*Segment Group Default

*Status Active

* Required Field

Define Segment Group page

Segment Group ID	Enter the unique identifier for the segment group. If you do not enter an identifier (leaving the default value of <i>NEXT</i>) then a group ID will be generated automatically.
Segment Group	Enter a name for the segment group.
Status	Select the current status of the segment group: <i>Active</i> or <i>Inactive</i> .

Defining Task Tools

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

- Define task shells.
- Define task sets.

Understanding Tasks

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

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

Pages Used to Define Task Tools

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

Defining Task Shells

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

Access the Task Shell page (Set Up CRM, Product Related, Marketing, Task Shell, Task Shell).

Task Shell

This page is for creating task shell.

Shell Type Campaign

Task Shell

*Name Priority

Description [?] [✓]

Status

* Required Field

Task Shell page

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

Name Enter a name for the task shell.

Description Enter a description for the task shell.

Priority Select a priority value for the task shell. The priority value indicates the urgency of the task shell for information purposes only.

Options are *High, Medium, and Low*.

Status Select a status for the task. Options are *Active and Inactive*.

Defining Task Sets

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

Access the Task Sets page (Set Up CRM, Product Related, Marketing, Task Sets).

Task Sets
This page is for creating task sets.

Group Type Campaign

Task Sets

*Name Status

Task Shell ID	
Create the Collateral	<input type="button" value="-"/>
Generate a List	<input type="button" value="-"/>
Create an Offer	<input type="button" value="-"/>
Schedule Channel Availability	<input type="button" value="-"/>

* Required Field

Task Sets page

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

Name Enter a name for the task set.

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

Defining TeleSales Elements

This section discusses how to:

- Define telesales fulfillments.
- Define telesales user dispositions.
- Incorporate an automatic transfer function into PeopleSoft TeleSales scripts.

Pages Used to Define TeleSales Elements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Fulfillments	RT_FULFILLMENT	Set Up CRM, Product Related, TeleSales, Fulfillments	Define collateral materials to use to fulfill telesales prospect requests.
User Dispositions	RT_USR_DISPOSTN	Set Up CRM, Product Related, TeleSales, User Dispositions	Define why a telesales prospect call is closed.

Defining TeleSales Fulfillments

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

Access the Fulfillments page (Set Up CRM, Product Related, TeleSales, Fulfillments).

Fulfillments

SetID SHARE SHARE

Fulfillments

* Fulfillment ID * Status ▼

* Description

Product

Long Description

Modified 02/07/2002 4:37PM PST SAMPLE

* Required Field

Delete

Fulfillments page

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

Note. In order for this notification to occur, the *Worklist* or *Email* routing preference must be selected on the Workflow tab of the User Profiles page (PeopleTools, Security, User Profiles, Workflow).

Defining TeleSales User Dispositions

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

Access the User Dispositions page (Set Up CRM, Product Related, TeleSales, User Dispositions).

User Dispositions

SetID SHARE SHARE

User Dispositions					
Customize Find View All First 1-7 of 7 Last					
*Final Disposition	*User Disposition	Description	Last Modified	Last Maintained By	
Do Not Call Again	IRATE	Irate Customer			+ -
Generate a Lead	COOL	Cool Customer Lead			+ -
Generate a Lead	HOT	Hot Customer Lead			+ -
Not Interested	HAVE	Already Has Similar Product			+ -
Not Interested	NEED	No Perceived Interest			+ -
Send Collateral by Email	SNDE	Do not email			+ -
Send Collateral by Mail	SNDM	Do not mail			+ -

* Required Field

User Dispositions page

User dispositions enable you to more fully explain why a telesales prospect call is closed. No delivered values are available and no associated processing is required.

- Final Disposition** Select a final disposition (the general reason why a prospect call is closed).
- User Disposition** Enter a user disposition code that explains the final disposition in more detail. You can enter multiple user dispositions for each final disposition.
- Description** Enter a description of the user disposition.

Incorporating an Automatic Transfer Function into PeopleSoft TeleSales Scripts

PeopleSoft TeleSales provides a PeopleCode function that automatically transfers telesales agents to the PeopleSoft Order Capture application when prospects reply positively to a ready-to-buy-question. You should use this PeopleCode function, `InitTelMktOrdCapture`, only with scripts associated with telesales campaigns that enable the telesales agent to capture orders directly (integration method Order Capture Direct). After the order capture is completed, the system returns the agent to the TeleSales Call Prospect page and sets the Call Outcome status to *Close Sale*.

See *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*.

Chapter 5

Creating Campaign Collateral

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

Understanding Campaign Collateral

This section discusses:

- Collateral types and subtypes.
- Collateral statuses.

Campaign collateral (also sometimes called *content*) is all the material that you produce to support a campaign. It includes material destined for your target audience and others outside your organization, as well as material for internal use. Campaign collateral can take any form: radio commercials on audio cassette, glossy direct mail packets, text files, and so on.

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

Examples of campaign collateral include:

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

Collateral Types and Subtypes

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

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

<i>Collateral Type</i>	<i>Collateral Subtype</i>
Creative	Ad Creative
Creative	Image Suite
Creative	Poster
Deliverable	CD
Deliverable	Data Sheet
Deliverable	Executive Overview
Deliverable	General Overview
Deliverable	Success Story
Deliverable	Value Proposition
Deliverable	White Paper
Direct Marketing	Call Script
Direct Marketing	Direct Mail Piece
Direct Marketing	Email
Direct Marketing	Letter
Direct Marketing	Magazine Insert
Event	Demo
Event	Event Handouts
Event	Giveaways

<i>Collateral Type</i>	<i>Collateral Subtype</i>
Event	Scripted Presentation
Event	Signage
Event	Staging
Event	Video
Press/Analyst	Bullet
Press/Analyst	Press Release
Press/Analyst	Press/Analyst Kit
Publishing	Article
Publishing	Magazine
Publishing	Newsletter
Sales Tools	Competitive Sales Guide
Sales Tools	Discussion Guide
Sales Tools	Market Research
Sales Tools	Sales Tools
Sales Tools	Send Mail
Sales Tools	Training Presentation
Web	Landing Pad and Offer
Web	Web Page

Collateral Statuses

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

The following table shows collateral statuses:

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

Managing Collateral

This section lists common elements and discusses how to:

- Add or editing a collateral definition.
- Define collateral.
- Associate files with collateral.
- Associate tasks with collateral.
- Enter the costs of creating collateral.
- View, add, and send collateral notes in email.

Common Elements Used in This Section

Collateral ID

The code that uniquely identifies the collateral.

SetID

The setID in which the collateral resides.

Pages Used to Manage Collateral

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage Collateral	RA_CONTENT_GRD_PG	Marketing, Manage Collateral	Add or edit collateral definition.
Manage Collateral - Collateral Details	RA_CONTENT_DETAIL	<ul style="list-style-type: none"> To add a new collateral definition, click the Add Collateral button on the Manage Collateral page. To view or edit an existing collateral definition, use the search functionality on the Manage Collateral page. Click the Collateral Name to access the definition. 	Define collateral.
Manage Collateral - Files	RA_CONTENT_ATCH	Marketing, Manage Collateral, Files	Associate files with collateral.
Manage Collateral - Task	RA_CONTENT_TASK	Marketing, Manage Collateral, Tasks Select a task type and click Add Task to add a task, or click Add Task Set to add a task set.	Associate tasks with collateral.
Manage Collateral - Costs	RA_CONTENT_COST	Marketing, Manage Collateral, Costs	Enter the costs of creating collateral.
Manage Collateral - Notes	RA_CONTENT_NOTE	Marketing, Manage Collateral, Notes Click the Summary of Notes link on the Collateral - Notes page.	Write notes and attach them to collateral, view brief descriptions of your collateral notes, and access those notes.

Adding or Editing a Collateral Definition

Access the Manage Collateral page (Marketing, Manage Collateral).

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

Defining Collateral

Access the Manage Collateral - Collateral Details page (click the Add Collateral button on the Manage Collateral page).

Manage Collateral - Collateral Details page

- Name** Enter a brief descriptive name for the collateral.

- Parent Name** At times, two or more pieces of collateral are related to each other. For example, you might have an envelope printed to match a brochure that you're sending out. To make sure that the two go together, you create a parent and child relationship. If the collateral has a parent, select that parent here.

- Description** (Optional) Enter a definition of the collateral.

- Type** Select a collateral type from the available list. Collateral types are defined on the Type setup page.

- SubType** Select a collateral subtype from the available list. Collateral subtypes are defined on the Sub Types setup page.

- Owner** Select a collateral owner. The owner is the person responsible for the collateral. The collateral owner is the default assigned-by person for collateral tasks.

- Status** Identify the collateral's position in its life cycle.

Quantity

Enter the quantity of the collateral to be produced.

Associating Files with Collateral

Access the Manage Collateral - Files page (Marketing, Manage Collateral, Files).

Manage Collateral

Save Add Collateral Refresh | Search | Previous | Next | Personalize

Setid SHARE Collateral ID CON0000104

Collateral MMA Content - TV AD Press Rel

Collateral Details Files Task Costs Notes

Attach File Customize Find First 1 of 1 Last

File Name	Description	Owner	Date Added
pressrelease.txt	Copy of Press Release - Add Coll		06/05/2001 11:20AM

Attach File

Save Add Collateral Refresh | Search | Previous | Next | Top of Page

Manage Collateral - Files page

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

File Name	Displays the name of the file attached to the collateral.
Description	Enter an optional description of the file.
Owner	Displays the person who is responsible for the file attached to the collateral.
Date Added	Displays the date when the file was attached to the collateral.
Attach File	Click the Attach File button to upload a file.

Associating Tasks with Collateral

Access the Manage Collateral - Task page (Marketing, Manage Collateral, Tasks).

Manage Collateral - Task page (1 of 2)

Manage Collateral - Task page (2 of 2)

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

Task Shell Select a task shell from the available options.

Task Sets Select a task set from the available options.

Add Task Click to add a new task.

Add Task Set Click to add a new task set.

Name Displays the name of the task or task set

Assigned By	Displays the name of the user who assigned the task or task set.
Assigned To	Displays the name of the user to which the task has been assigned.
Start Date	Displays the date that the task is to begin.
Due Date	Displays the date that the task is scheduled to be completed.
Priority	Displays the relative urgency of the task.
Status	Displays the position of the task in its life cycle.
% Complete (percent complete)	Displays the portion of the task that you have completed.
Description	Displays the description of the task or task set.

See and [Chapter 4, "Setting Up PeopleSoft Marketing and TeleSales," Defining Task Tools, page 58.](#)

Entering the Costs of Creating Collateral

Access the Manage Collateral - Costs page (Marketing, Manage Collateral, Costs).

Manage Collateral

Save Add Collateral Refresh | Search | Previous | Next | Personalize

Setid SHARE **Collateral ID** CON0000104

Collateral MMA Content - TV AD Press Rel

Collateral Details Files Task Costs Notes

Record Costs Customize | Find | | | First 1 of 1 Last

*Cost Description	Components	Variable	Unit Cost	Forecast Value	Actual Value
Creative ▼	Collateral	Fixed	<input type="text"/>	1000.00	1000.00
Add Collateral Cost			Totals	1000.00	1000.00 Calculate

* Required Field

Save Add Collateral Refresh | Search | Previous | Next | Top of Page

Manage Collateral - Costs page

Cost Description	Select the description of the cost that you want to associate with the collateral. Costs are defined on the Cost setup page.
Components	Displays the description of the cost type associated with the selected cost.
Variable	Displays whether the cost of the collateral is defined as variable or fixed.

Unit Cost	Enter the cost of a single unit of the collateral.
Forecast Value	Enter the expected cost of all the collateral. This is the number of pieces multiplied by the unit cost.
Actual Value	Enter the actual cost of all the collateral. This is the final cost after adjustments are made for quantity purchased or changes in unit costs.

Viewing, Adding, and Sending Collateral Notes in Email

Access the Manage Collateral - Notes page (Marketing, Manage Collateral, Notes).

See *and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Chapter 6

Using Offers

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

Understanding Offers

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

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

Offers can also be presented to customers either associated with a marketing activity or as a standalone offer, and their reactions to the offers can be tracked. Third-party optimization tools can be used to make decisions as to which offers are most appropriate for a given customer. Other than marketing activities, customers can be presented with offers from:

- Case.
- Order Capture.
- 360–Degree View.
- TeleSales.

See [and PeopleSoft CRM 9.1 Call Center Applications PeopleBook](#).

See [and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook](#).

See [and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook](#), "Interactions and 360-Degree Views."

See [and Chapter 10, "Using PeopleSoft TeleSales," page 189](#).

Offer Statuses

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

Status	Description
New	Offer has just been created or imported.
In Review	Offer is being reviewed for approval.
Declined	Offer was not approved for use in this campaign activity.
Planning	Offer was approved for use in this campaign activity and is now in development.
Completed	Offer is defined and ready for use.
Archive	Offer has been set to be no longer usable.

Understanding Offer Presentation

When presenting offers, the system requests recommendations from third-party optimization engines that determine the best choice for a customer based on various criteria.

Offers can be presented to customers in two ways:

- *Passive* offers require the user to click on an icon in order to view the offer.
- *Active* offers pop up automatically on an agent's screen, their content based on which offers are the most appropriate for the given customer.

Both active and passive offers take the user to the same page—the only difference is how they are invoked.

Configuring the System to Allow Offer Management

Before you can use Offer Management, you must set up the third-party optimization engine and set up the appropriate AAF policies to activate passive and active offers.

Delivered with the application is an abstract wrapper class named *OfferRecEngineAbstract*. This class contains an abstract definition of the methods that Offer Management uses to communicate with the third-party optimization engine. Also included is the *OfferRecEngineProd* class, which extends the abstract wrapper class and contains implementations of actual communication with the third-party optimization engine. Because every customer's actual implementation is different, the methods in this class are mostly empty—you must supply the necessary code to integrate with your chosen third-party engine.

You can find additional information about the wrapper classes by searching for the extension reference ROF_REC_ENGINE at Setup CRM, Common Definitions, Component Configuration, Application Class Extensions.

See [Chapter 4, "Setting Up PeopleSoft Marketing and TeleSales," page 11.](#)

Passive Offers

In the case of passive offers, the user requests offer recommendations from the third-party optimization engine by clicking on a predefined button on a page. In the delivered applications, this button appears as either a "spinning dollar sign" on the page's toolbar (360-Degree View, TeleSales, and Case) or in the middle of the page (Order Capture).

The button is available when the following conditions are met:

- Configuration information is set to indicate that the customer is running a third-party optimization engine, or
- The customer or contact on line to a call center has been targeted for a campaign-driven marketing promotion (this applies to passive offers presented from Order Capture only).
- The appropriate AAF policy has been set, as shown in the following table:

Toolbar	AAF Action
360-Degree View	Display Offer Icon in 360
TeleSales	Display Offer Icon
Case	Upsell Configuration on Case

Order Capture does not require an AAF policy to display the icon on the Order Capture page.

Note. The spinning dollar sign button is also available on the customer's 360-Degree View.

In order to perform retrieval of offer recommendations, additional AAF policies must be set up. For 360-Degree View, TeleSales, and Case, a policy must be set up that uses the action "Display Offer Alerts." The number of offer recommendations can be configured in the policy. For Order Capture, a policy must be set up that uses the action "Display Offers and Promotions." On this policy, you can configure the number of offer recommendations as well as the option to use the third-party optimization engine to retrieve offer recommendations, retrieve campaign-driven marketing promotion, or use both.

After the agent clicks the button, the system returns recommendations (the number of which the user can configure) based on conditions set up in the AAF policy. The recommendations are returned in the form of a series of offer IDs, the details of which are displayed along with applicable campaign-driven promotions for which the customer has been targeted. From this page, the agent can:

- View products and pricing rules associated with the offer.
- Initiate either a branch script or a Real-Time Advisor script associated with the offer for the purposes of scripted selling.
- Select products associated with an offer.
- Accept an offer.
- Reject an offer.
- Register interest in an offer.

Active Offers

In the case of active offers, the system uses an AAF action to request offer recommendations from the third-party optimization engine automatically at multiple trigger points throughout the application. Additional AAF actions can be configured to invoke the request action from preconfigured trigger points whenever the policy conditions are met. For the 360-Degree View, Case, TeleSales, and Order Capture, you must set up a policy that uses the action "Display Offer Alerts."

As in the passive offer, the system returns a user-configurable number of recommendations, in the form of offer IDs, based on conditions set up in the AAF policy. The AAF action initiates a pop-up window to display the details of the recommended offers. The pop-up window contains links that allow the user to view further details for each offer. Each link opens a subsequent page, from which the user can:

- View products and pricing rules associated with the offer.
- Initiate either a branch script or a Real-Time Advisor script associated with the offer for the purposes of scripted selling.
- Select products associated with an offer.
- Accept an offer.
- Reject an offer.
- Register interest in an offer.

Delivered AAF Actions

The following table shows the AAF actions that are delivered with Offers.

AAF Action	Description
Initiate Offer Rec Section	Initiates a new section with the third-party optimization engine for the given customer or contact.
Send Offer Session Data Update	Sends data updates to the third-party engine for the customer actions that might change during the call.
Display Offer Alerts	Requests a list of offer recommendations from the third-party optimization engine and displays the list in a pop-up window.
Display Offer Icon in 360	Displays the spinning dollar sign icon on the 360–Degree View toolbar.
Display Offers and Promotions	Generates a list of offer recommendations from the third-party optimization engine, from offers associated with marketing campaigns, or both.
Upsell Configuration on Case	Displays the spinning dollar sign icon on the Case toolbar. This action can be configured to use offers as the type of upsell this icon will represent. The offer configurable option is only be available if a third-party optimization engine is installed.

You will need to create AAF policies to use these actions.

See *and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

Offer Logging and Post-Presentation Flow

When a customer registers a reaction to an offer presented via the third-party system (for example, Accept or Decline), this reaction is logged. The following occurs:

- The reaction (including customer ID, contact ID, offer ID, disposition of the offer, and the timestamp) is logged in the Offer History table and in an Offer History node in the 360-Degree View that shows offer history by disposition.
- A message is sent to the third-party system to indicate the customer's disposition of the offer.

If the customer accepts the offer and there are related products associated with it, the system navigates to the Order Capture Screen, where the following occurs:

- An order line is created for the product selected from the offer.
- Pricing rules associated with the offer are applied to the order.
- Order Capture tracks the offer by storing the Offer ID.

If an order is generated from an offer relating to a case, corresponding order details are tracked back to the originating case.

If an order is generated from an offer relating to TeleSales, the order is tied back to the campaign activity only if a Sales Lead or Opportunity is tied directly to the campaign activity.

See *and PeopleSoft CRM 9.1 Call Center Applications PeopleBook*.

Creating Offers

In this section, we discuss how to:

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

Pages Used to Create Offers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage Offers	RA_OFFER_DETAIL1	Marketing, Manage Offers, Offer	Define attributes that make up a campaign offer.

Page Name	Definition Name	Navigation	Usage
Create Price Rule - Select products, partners and discount	RA_PRICESET_PG	<ul style="list-style-type: none"> Click the Add Price Rule link on the Offer page when creating a new offer. Click the Update products and price rule link on the Offer page when editing an existing offer. 	Specify the type of discount structure that applies to the offer and the products offered.
Create Price Rule - Define Price Breaks	RA_PRICE_BREAK	Click the Next button on the Create Price Rule - Select products, partners and discount page.	Define the discount structure of the offer.
Create Price Rule - Review and Save	RA_PRICE_BREAK3	Click the Next button on the Create Price Rule - Define Price Breaks page.	Confirm price rule selections before saving the definition.
Note	RA_OFFER_NOTE	Marketing, Manage Offers, Note	Write notes and attach them to offers.

Defining an Offer

Access the Manage Offers page (Marketing, Manage Offers, Offer).

Manage Offers

[Personalize](#)

Offer COMPUTER OFFER 20% DISCOUNT **Status** Completed
Start Date 01/01/2002 **End Date** 12/31/2005

Offer Details

Offer **Type** Promotional Discount
***Status** **Owner**

Objective **Start Date** **End Date**
Priority Medium **Control %**

Description

Price Rule

Summary COMPUTER OFFER 20% DISCOUNT
Discount Standard Discount **Price Rule** A020300001

Product Selection	
Description	List Price
Tekra-1000 Business Laptop	US001->BOX-20999.99, US001->BOX-15999.99, US001->CS-30000, US001->CS-25000, US001->EA-4000, US001->E
TEKRA-2000 Consumer Laptop	US001->BOX-30000.99, US001->BOX-20000.99, US001->CS-40000.01, US001->CS-30000.01, US001->EA-3999.99,

Manage Offers page (page 1 of 2)

Discount Detail						
Unit of Measure	Low Quantity	Upper Quantity	Adjustment Type	Percent	Amount	Currency
Each	1.0000	100.0000	Percent	20.00		

▼ Presentation

Display Message

Script Type

Marketing Channels	
Channel Execution	
TeleSales	
Order Capture	
Mail Correspondence	
Sales Force	
Cross Sell	

Transaction Context
No transaction context have been added to this offer.

▶ Audit History

Manage Offers page (page 2 of 2)

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

Offer	Enter a name to uniquely identify the offer.
Type	Displays whether the offer is a Promotional Discount or a Communication offer. You specified the type on the Manage Offers search page. You cannot add the offer unless a type is selected.
Status	Enter the position of the offer in its life cycle
Owner	Enter or select the name of the person designated as the offer owner. By default, this field is filled in with the name of the currently signed-on user.
Objective	Select an objective for the offer.
Priority	Select a priority for the offer.
Control %	Specify a control percentage for the offer. This value is informational for the PeopleSoft Marketing system, but will be used by third-party tools to create "control group" scenarios (for example, to specify to the tool that it should only present the offer to 5% of the eligible customers).
Start Date and End Date	Enter the start and end dates that the offer is valid.

Internal Description	Enter a description of the offer that will only be viewed by internal personnel—the offer recipient will not see this description.
Price Rule	<i>(Promotional Discount offer only)</i> Displays information about the products and price rule for the offer.
Discount Detail	<i>(Promotional Discount offer only)</i> Displays information about the discount associated with the offer.
Update Products and Price Rule	<i>(Promotional Discount offer only)</i> Click to access the Create Price Rule wizard, where you can add or update products and price rules. <hr/> Note. You cannot access the Create Price Rule wizard when the offer's Status is Complete or Archived. <hr/>
Display Message	Enter a description of the offer that will be visible to the offer recipient.
Script Type	Select whether the script type is an Advisor dialog or a branch script.
Script Name	Select the name of the Advisor dialog or branch script you specified. This field appears when you select a Script Type.
Marketing Channels	Select a channel from the available list. The available options vary depending on the offer type. For Promotional Discount, the choices are TeleSales, Order Capture, Mail Correspondence, Sales Force, and Cross Sell. For Communication, the choices are Mail Correspondence and Cross Sell.
Add Channels	Click to specify marketing channels to add to the Marketing Channels list.
Add All Channels	Click to add all available marketing channels to the list.
Transaction Context	Select an AAF Context to associate with the offer. This information indicates the contexts from which the offer can be recommended, and is used for tracking that point of contact (for example, the offer is presented from the Call Center). You can associate multiple AAF Contexts with an offer. The allowable contexts are: <ul style="list-style-type: none"> • Case. • Order Capture CI. • 360-Degree View.
Add Context	Click this button to add an AAF Context to the list.
Add All Context	Click to add all the available AAF Contexts to the list.

Creating Price Rules

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

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

Selecting Your Discount Type and Offered Products

Access the Create Price Rule - Select products, partners and discount page (click the Price Rules link on the Offer page).

Create Price Rule

1 — 2 — 3

Step 1 : Select products, partners and discount

Discount Type Giveaway

Product		Find <input type="button" value="x"/> <input type="button" value="grid"/>	First <input type="button" value="left"/> 1 of 1 <input type="button" value="right"/> Last
*Description	List Price		
Switchback Mt. Biking Shorts, <input type="button" value="magnifying glass"/>	US010->EA-49, US011->EA-85	<input type="button" value="trash"/>	

Partners Customize | Find | View All | |

Partner Company	First <input type="button" value="left"/> 1 of 1 <input type="button" value="right"/> Last
<input type="text"/>	<input type="button" value="magnifying glass"/> <input type="button" value="trash"/>

[Return to Manage Offers](#)

* Required Field

Create Price Rule - Select products, partners and discount page

Discount Type

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

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

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

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

No Discount: Allows creation of offers with products that will not be presented with a discount. If the product selected has no discount, all customers will pay full price for the product regardless of the quantity ordered.

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

Product ID

Select the ID of the offered product.

Description

Displays the description of the selected product.

List Price

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

Partner Company

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

Defining Quantity Breaks and Price Adjustments

Access the Create Price Rule - Define Price Breaks page (click the Next button on the Create Price Rule - Select products, partners and discount page).

Create Price Rule

1 — 2 — 3

Step 2 : Define Price Breaks

*Unit of Measure	*Low Quantity	*Upper Quantity	*Description	Unit of Measure (Promotion)	Quantity
Each	1.0000		Biking Gloves, Unisex	EA	1.0000

Add Price Break

<< Back Next >> [Return to Manage Offers](#)

* Required Field

Create Price Rules - Define Price Breaks page

The discount type that you select in Step 1 determines the fields needed for Step 2. The following fields apply to all discount types except No Discount.

Note. This page does not appear when the discount type selected is *No Discount*.

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

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

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

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

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

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

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

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

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

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

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

The following fields apply only to Giveaway discount types.

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

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

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

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

Reviewing and Saving Your Price Rule Definition

Access the Create Price Rule - Review and Save page (click the Next button on the Create Price Rule - Define Price Breaks page).

Create Price Rule

1 2 3

Step 3 : Review and Save

Product Selection		Customize Find [Map] [Grid] First 1 of 1 Last	
Description	List Price		
Switchback Mt. Biking Shorts,	US010->EA-49, US011->EA-85		

Partners		Customize Find [Map] [Grid] First 1 of 1 Last	
Partner Company			

Price Breaks					Customize Find [Map] [Grid] First 1 of 1 Last	
Unit of Measure	Low Quantity	Upper Quantity	Description	Unit of Measure (Promotion)	Quantity	
Each	1.0000		Biking Gloves, Unisex	EA	1.0000	

[Return to Manage Offers](#)

Create Price Rule - Review and Save page

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

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

Note. The Price Breaks grid does not appear if the *No Discount* discount type was selected.

See Also

[Chapter 6, "Using Offers," Creating Price Rules, page 84](#)

Attaching Notes to Offers

Access the Offers - Note page (Marketing, Manage Offers, Note).

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

See [and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook](#), "Working with Notes and Attachments."

Presenting Offers

This section describes how to present an offer that has already been created.

Pages Used to Present Offers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Offer	ROF_OFFERPRESENT	Click the spinning dollar sign icon in the 360–Degree View, Case, or other page where Offer Management has been set up. or Click an offer in a pop-up window that displays a list of offers.	View recommended offers and their details, and select one to present to a customer.

Presenting Offers

Access the Offer page (click an offer in a pop-up window that displays a list of offers).

Present Offer

Offers			
Offer Name	Score	Expiration Date	Script
BUY A REFRIGERATOR AND GET FREEZER SHELVES FREE	90.00	12/31/2009	
FREEZER VOLUME DISCOUNT 10%	90.00	10/31/2009	
Customer Appreciation Offer	90.00	12/31/2009	
Air Conditioning CU Offer	90.00	12/31/2009	

Offer Details

Message

We appreciate your business. For the upcoming month, you will automatically get 200 additional minutes free.

Accept Offer Defer Offer Reject Offer

Present Offer page

Recommended Offer

Displays a list of recommended offers (either selected through marketing promotions or optimized by the third-party optimization system based on customer information).

Score

This value indicates the "fit" of the offer to the customer. The score is assigned to the offer by the third-party optimization system, based on the likelihood that a given customer will accept the offer. Offers associated with campaign-driven promotions will show a score of zero. If duplicate offers exist (from a targeted promotion and suggestion by the third-party system), only the offer with the higher score (usually the third-party system suggestion) is shown.

Offer Details

The content of this section will vary depending on the type of offer selected. Some available offer types include:

- Product offers.
- Communications offers.
- Promotional discount offers (including giveaways).

Chapter 7

Using Audiences

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

- Create and manage audiences.
- Export audiences for use outside the PeopleSoft CRM application suite.
- Sending SMS messages to audiences.

Understanding Audiences

This section discusses:

- Audiences
- Segments
- Audience statuses
- Audience sources
- Audience types
- Using audiences with the CRM/Student Administration integration

Audiences

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

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

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

Before you define an audience, consider the following questions:

- Are the intended recipients all known to you?

That is, are the intended recipients already in your PeopleSoft CRM database (an internal audience), or are they unknown to you and will they be contacted by an outside vendor (an external audience)?

- How will you contact the recipients?

For example, do you plan to contact them using PeopleSoft TeleSales, Online Marketing, or Sales applications, or will you use a third-party direct-mail vendor?

- Do you want the audience to reflect changes to the database each time that you generate the audience (a dynamic audience), or will the audience remain the same (a fixed audience)?
- Will you use the audience to test your campaign before you take it live or will you try different strategies (a test audience)?

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

Note. Because you can use audiences with multiple campaigns, you should carefully consider changes to an existing audience so that you don't adversely affect another campaign. For this reason, PeopleSoft Marketing enables you to clone audiences.

Segments

A segment is a group of customers defined by some selection criteria. Segments are considered a type of audience—you define their selection as you do audiences, and you can use them interchangeably with dynamic audiences in PeopleSoft Marketing, Online Marketing, and the enterprise.

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

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

Audience Statuses

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

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

An audience can pass through the following statuses:

<i>Audience Status</i>	<i>Description</i>
<i>In Design</i>	Audience is new and selection criteria is not yet defined.

<i>Audience Status</i>	<i>Description</i>
<i>Designed</i>	At least some audience selection criteria are defined.
<i>Scheduled</i>	Audience is scheduled to be generated at a definite future date and time.
<i>Processing</i>	Audience generation is currently in process.
<i>Generated</i>	Audience generation process finished successfully.
<i>Approved</i>	Audience is approved for use in live campaigns.
<i>Committed</i>	Audience is in use by one or more campaign activities and cannot be modified except to add correspondence management requests or to manually change the status of the audience to <i>Archived</i> .
<i>Archived</i>	Audience is inactivated and cannot be newly associated with any campaign. Audience status can be changed only to <i>Archived</i> when the audience is not in use by a live campaign or by an online dialog.

Audience Sources

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

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

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

The following table lists and describes the nine sources of audiences:

Audience Source	Description
<i>External using Online Marketing</i>	<p>An <i>External using Online Marketing</i> audience is made up of contacts previously unknown to your PeopleSoft Marketing system. For example, placing a banner ad on a website exposes your offer to an audience, but you have no idea who will see it and respond.</p> <p>External audiences are intended to be used in conjunction with Online Marketing dialog popup web pages where the audience is unknown.</p>
<i>Internal Using Audience Builder</i>	<p>The audience is generated from contacts currently in the PeopleSoft Marketing database. Audience Builder enables users who do not know SQL to define a simplified selection query.</p>
<i>Internal Using Combine Audiences</i>	<p>Two or more existing audiences are combined into a new, larger audience. All existing audiences included in a combined audience definition must be drawn from contacts currently in the PeopleSoft Marketing system.</p>
<i>Internal Using Import</i>	<p>A contact list is imported into your PeopleSoft CRM database, from which you generate an internal (known) audience.</p>
<i>Internal Using PSQuery</i>	<p>This query uses PSQuery functionality to create an audience from contacts currently in the PeopleSoft Marketing system. Using PSQuery requires a knowledge of SQL.</p>
<i>Internal Using Saved Search</i>	<p>This search is based on the search criteria entered on a Configurable Search page. You must first enable audience creation using the Configurable Search page. An enabled search page enables you to save the search as an audience.</p> <p>Note. This option doesn't appear when you are creating a new audience. You can view or update this audience type on the Audience Detail page, but you cannot create it.</p>
<i>Control Group</i>	<p>Control groups help you gauge the effectiveness of your campaign by isolating a small segment of your target audience. By comparing sales results of the larger audience to those of the control group, you can determine the actual influence of your campaign. How control group members are drawn from each included audience is controlled by a combination of the control group audience size and source audience percentages.</p> <p>Note. This option doesn't appear when you are creating a new audience. You can view or update this audience type on the Audience Detail page, but you cannot create it.</p>

Audience Source	Description
<i>Test Audience</i>	<p>You create a test audience by selecting a subset of a generated audience. Use test audiences to try different offers on different subsets of your audience. These test audiences can be created as a percentage of the original audience count, or users can specify the total number of records for each test audience. Test audience selection is random. All test audiences are fixed audiences.</p> <p>Note. You can create test audiences only for audiences in the status of Generated, Approved, or Committed.</p>
<i>Segment</i>	<p>A segment is similar to an audience built using Audience Builder. You can create segments in a hierarchical structure in which a child segment automatically inherits the roles and selection criteria of its parent segment.</p>

See Also

PeopleTools 8.52: PeopleSoft Query PeopleBook

Audience Types

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

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

Note. Segments are always dynamic.

The following table describes the audience types:

Audience Type	Description
<i>Fixed</i>	<p>The audience query runs only at the time the audience is created—results are static after the audience is generated. New contacts meeting the audience criteria are not added to the list unless you manually regenerate the audience, or clone it and generate the cloned audience.</p> <p>Audience members can be added manually to a fixed audience.</p>

<i>Audience Type</i>	<i>Description</i>
<i>Dynamic</i>	Audience query criteria is stored and run each time that an action associated with the audience runs. Each time that you use the audience, new contacts that meet the criteria are included in the results, and old contacts that no longer meet the criteria are omitted from the results.

Creating and Managing Audiences

This section lists common elements and discusses how to:

- Create and update audiences.
- Create and update segments.
- Define a segment group.
- Associate audiences and segments with activities.
- Create audience and segment plans.
- Associate costs with an audience or segment.
- View and add audience or segment notes.
- Remove records from a generated audience.
- Manage audience or segment correspondence.
- Define teams for an audience.
- Use delivered Active Analytics Framework terms with audiences.
- Use history and audience membership data with audiences.
- Use the sales leads profile with audiences.
- Define Active Analytics Framework terms for audiences.

Common Elements Used in This Section

Count	Displays the number of records (people) in the audience.
	Note. The count for dynamic audiences and segments represents the number of records in the audience at the time that it was last generated. The audience count is not updated when it is used as part of a PeopleSoft Online Marketing Dialog. For example, at the time of approval, a dynamic audience might contain 500 records. Two weeks later, when the audience is used by PeopleSoft Online Marketing, the audience might grow to 550 records.
Owner	The person who is responsible for an audience.
Status	The position of an audience in its life cycle. Values are <i>Approved</i> , <i>Archived</i> , <i>Committed</i> , <i>Designed</i> , <i>Generated</i> , <i>In Design</i> , <i>Processing</i> , and <i>Scheduled</i> .

Pages Used to Create and Manage Audiences

Page Name	Definition Name	Navigation	Usage
Audiences	RA_LIST_SUMMARY	Marketing, Manage Audiences	Create and update audiences.
Audience Detail	RA_LIST_MAIN	<ul style="list-style-type: none"> Click an audience name on the Audiences page to open an existing audience. Click the Create New Audience button on the Audiences page to define a new audience. 	Define and update audiences.
Segment Detail	RA_LIST_SEG_MAIN	<p>Click a segment name on the Audiences page to open an existing segment.</p> <p>Click the Create a New Segment button on the Audiences page to define a new segment.</p>	Define and update segments.

Page Name	Definition Name	Navigation	Usage
Define Segment Group	RA_SEGMENT_GROUP	Set Up CRM, Product Related, Marketing, Audiences, Segment Groups or Click the Add New Segment Group button on the Segment Detail page.	Define segment groups, which are used to group segments and segment hierarchies.
Create a Target Audience - Select Roles	RA_LB_STEP_1	Click the Define Selection Criteria button on the Audience Details page.	Select basic profiles to include in audience selection.
Create a Target Audience - Define Selection Criteria	RA_LB_STEP_2	Click the Next Step button on the Create a Target Audience - Select Roles page.	Select profile fields and values to define audience selection criteria.
Create a Target Audience - Review and Save	RA_LB_STEP_3	Click the Next Step button on the Create a Target Audience - Define Selection Criteria page.	Confirm contents of the audience selection criteria.
Activities	RA_LIST_WAVES	Marketing, Audiences, Activities	View activities associated with audiences.
Plans	RA_LIST_PLANS	Marketing, Audiences/Segments, Plans	Define plans for audiences and segments. This page is visible only if the audience or segment has been published.
Costs	RA_LIST_COST	Marketing, Audiences, Costs	Associate costs with audiences.
Notes	RA_LIST_NOTE	Marketing, Audiences, Notes	View brief descriptions of your audience notes and access those notes.
Result List	RA_LIST_RECS	Marketing, Audiences, Audience Result List	View, add, or eliminate records from a generated audience.
Audiences - Correspondence	RA_LIST_CM	Marketing, Audiences, Correspondence	View summary information about audience correspondence and initiate new correspondence.

Page Name	Definition Name	Navigation	Usage
Team	RA_LIST_TEAM	Marketing, Manage Audiences, Team	Associate team members with an audience. You can associate individual workers or entire roles as team members—in the case of roles, each individual worker who has that role is considered a team member. Team membership can be used to control or limit who can access this audience or segment. Note. The audience or segment's owner, as defined on the Audience Detail or Segment Detail page, is always automatically added as a team member when the audience is saved.
Create Test Audiences	RA_TEST_AUDIENCE	Click the Create Test Audience button on the Audience Detail page.	Create one or more test audiences for an audience in generated, approved, or committed status.

Creating and Updating Audiences

Access the Audiences page (Marketing, Manage Audiences).

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

You create audiences using profiles. For a complete explanation of profiles, refer to the PeopleSoft Application Fundamentals documentation.

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

See *and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*.

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*.

Creating an Audience

Access the Audience Detail page (click an audience name on the Audiences page).

Audience

Save | Add Audience | Search | Next | Refresh | Clone | Send SMS

Audience	Status In Design
Owner 00John 00Doe	Last Updated 08/25/2009 10:20AM

Audience Detail | Result List | Activities | Correspondence | Team | Costs | Notes

Audience Definition

* Audience Name <input type="text"/>	* Status <input type="text" value="In Design"/>
* Audience Source <input type="text" value="Internal using Audience Builder"/>	* Type <input type="text" value="Fixed"/>
Owner Name <input type="text"/>	Last Updated 08/25/2009 10:20AM
Description <input type="text"/>	
<input type="checkbox"/> Published <input type="checkbox"/> Secured Audience	

Audience Information

Selection Criteria No selection criteria has been defined.

Define Selection Criteria

Audience/Count Generation

Date Last Generated	Count 0
Generate Audience/Count	
<input checked="" type="radio"/> None	
<input type="radio"/> Date <input type="text"/>	<input type="text"/> Time
<input type="radio"/> Now	
Audience Generation Log <input type="text"/>	

Clone Audience Test SQL/Count

Save | Add Audience | Search | Next | Refresh | Clone | Send SMS | Top of Page

* Required Field

Audience Detail page

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

Audience Definition

Audience Name

Enter a descriptive name for the audience. This field is display-only after the audience is saved.

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

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

Note. The values *Control Group*, *Test Audience*, and *Internal using Saved Search* are not available when you define a new audience. These types of audience are created through other means, but you can view or update them when the audience has been created.

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

Secured Audience Click to limit access of the corresponding audience information only to authorized users.

If Marketing Center Security is enabled at the installation level, the system restricts audience information to users who are members of the marketing centers with which the audience is associated on the Team page.

See [Chapter 7, "Using Audiences," Defining Teams for an Audience, page 124.](#)

Audience/Count Generation

Date Last Generated Displays the date and time when the audience was last generated successfully.

Generate Audience/Count Select when you want the audience to be generated. Values are:

None: Select if you are creating an audience definition to use at an unknown future date and you do not want to generate the definition at this time.

Date and Time: Select to specify a date and time for the audience to be generated.

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

Audience Generation Log Displays information about generated audiences. For each effort to generate an audience, the log includes the date and time, the outcome of the effort, and the number of records (people) placed on the audience.

Generating an Audience Using Audience Builder

Access the Create a Target Audience - Select Roles page (click the Define Selection Criteria button on the Audience Details page).

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

Create a Target Audience

1 2 3 [Process Overview](#)

Step 1: Select Roles

Roles	
<input type="checkbox"/>	Contact for a Company
<input type="checkbox"/>	Consumer
<input type="checkbox"/>	Contact for a Partner
<input type="checkbox"/>	Worker
<input type="checkbox"/>	Person of Interest

[Return to Audience Details](#) [Next Step >>](#)

Create a Target Audience - Select Roles page

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

Roles

Select the check box that corresponds to the person represented in the PeopleSoft CRM CDM (Customer Data Model) as a *Contact for a Company* (a representative of a company), a *Consumer*, a *Contact for a Partner* (a representative of a partner), a *Worker* (an employee of a company), or a *Person of Interest*. A person can appear as both, or even appear as a contact multiple times, if that person represents more than one company. You must select at least one check box, but can select more than one to include all eligible records.

See [and PeopleSoft CRM 9.1 Business Object Management PeopleBook](#).

Defining Selection Criteria

Access the Create a Target Audience - Define Selection Criteria page (click the Next Step button on the Create a Target Audience - Select Roles page).

Create a Target Audience

1 2 3

Step 2: Define Selection Criteria

[Switch to Advanced Mode](#)

And/Or	Profile Field	Operator	Value	
	Individuals.People.SetID	is equal to	SHARE	+ -
And	Individuals.People.Do Not Contact	is not equal to	Yes	+ -
And	Individuals.Sales Leads.Lead Rating	has at least one	Hot	+ -

<< Back
[Return to Audience Details](#)
Next Step >>
Test SQL/Count

Create a Target Audience - Define Selection Criteria page

Filter the final results of your audience by defining selection criteria. Audience Builder offers both a basic and advanced mode.

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

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

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

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

As long as the contact has at least one VISA credit card, and any one of the cards (whether VISA or not) has an expiration date before November 28, 2002, a selection is returned. On the other hand, the following definition will return a selection only when the contact has at least one VISA card with an expiration date before November 28, 2006:

And/Or	Profile Field	Operator	Value
	Individuals.CreditCards.CreditCardCompany	has at least one	VISA
With	Individuals.CreditCards.ExpirationDate	less than	10/28/2006

Profile Field

Select the profile fields that contain the data that you will use for your selection criteria. Fields from any activated profile that fall under the role or roles selected are available. Refer to the PeopleSoft Business Object Management documentation for more information about how profiles are defined.

You can add additional fields to further narrow your selection criteria. For profiles under the Individual folder, you can search on keywords within the Individuals profiles (for example, you could search on "Academic" and find all the profiles under Individuals with "Academic" in their names.

Operator

Specify the criteria operator.

Value

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

And/Or

Select an operator to connect condition clauses.

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

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

Note. A *With* connector is available for use in advanced mode with a Many Row profile type.

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

Available Operator	Profile Type	What is Included
is empty	One Row	Includes any record that has no data in the selected field.
is not empty	One Row	Includes any record in which data is in the selected field.

<i>Available Operator</i>	<i>Profile Type</i>	<i>What is Included</i>
is equal to	One Row	Includes any record in which the data in the selected field is equal to the specified value.
is not equal to	One Row	Includes any record for which the data in the selected field is not equal to the specified value.
is less than	One Row	Includes any record in which the data in the selected field is less than the specified value.
is no more than	One Row	Includes any record in which the data in the selected field is less than or equal to the specified value.
is at least	One Row	Includes any record in which the data in the selected field is equal to or greater than the specified value.
is more than	One Row	Includes any record in which the data in the selected field is greater than the specified value.
contains	One Row	<p>Includes any record in which the character or string data in the selected field contains the specified character or string value.</p> <p>Note. Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.</p> <p>Note. This operator is available only in advanced mode.</p>
not contains	One Row	<p>Includes any record in which the character or string data in the selected field does not contain the specified character or string value.</p> <p>Note. Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.</p> <p>Note. This operator is available only in advanced mode.</p>

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

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

Available Operator	Profile Type	What is Included
has none less than	Many Row	Includes any individual having no associated records in which the data in the selected field is less than the specified value.
has none more than	Many Row	Includes any individual having no associated records in which the data in the selected field is more than the specified value.
has any less than	Many Row	Includes any individual having at least one record in which the data in the selected field is less than the specified value.
has any more than	Many Row	Includes any individual having at least one record in which the data in the selected field is more than the specified value.
is one of	One Row	Includes any record in which the value of the data in the selected field is equal to one of the values specified in the list of values.
includes	Dialog History, Campaign History, Audience Membership	Includes any individual who has been targeted by the specified dialog and has performed the selected action (Dialog History), any individual who has performed the specified campaign action (Campaign History), or any individual who is a member of the specified audience or segment (Audience History).
not includes	Dialog History, Campaign History, Audience Membership	Includes any individual who has not been targeted by the specified dialog or has not performed the selected action (Dialog History), any individual who has not performed the specified campaign action (Campaign History), or any individual who is not a member of the specified audience or segment (Audience History).
is equal to current date	One Row	Includes any record in which the data in the selected field is equal to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
is prior current date	One Row	Includes any record in which the data in the selected field is prior to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.

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

Available Operator	Profile Type	What is Included
has none prior curr. date (has none prior current date)	Many Row	Includes any individual who has no associated records in which the data in the selected field is prior to the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.
has none after curr. date (has none after current date)	Many Row	Includes any individual who has no associated records in which the data in the selected field is after the current date on the day that the query is run. This operator is particularly useful with dynamic audiences.

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

See *and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

See *and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*.

Reviewing and Saving Audience Creation Information

Access the Create a Target Audience - Review and Save page (click the Next Step button on the Create a Target Audience - Define Selection Criteria page).

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

Note. When combining audiences, the system checks for duplicate members. Audience members are assumed to be duplicates when they have the same BO ID and role. If one audience contains an active auto-added member and the second audience contains a manually added duplicate member, the manually added member is the one added to the new combined audience.

Importing an Audience

Creating an imported audience involves defining an audience shell within PeopleSoft Marketing, then importing audience data into the CDM using the CDM Data Import process. The CDM Data Import process populates the audience table. After you create an audience, you can attach it to an activity, select records, deduplicate (remove duplicate members), or anything else that you can do with any other audience.

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Importing Data into PeopleSoft CRM."

Generating an Audience Using PeopleSoft Query

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

Note. Audience Builder does not support explicit ordering in the query. If the query has a sort order, the sort is automatically discarded.

To be used for audience generation, a query must:

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

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

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

Query Name Select the query that was created using PeopleSoft Query Manager.

Modified Query SQL

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

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

Query Manager

Click to access the PeopleSoft Query Manger.

See *PeopleTools 8.52: PeopleSoft Query PeopleBook*

Cloning an Audience**Clone Audience**

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

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

For fixed audiences, manually added members from the original audience are copied to the new audience. After saving the new audience, you can choose to generate the audience. Duplicate members are checked upon generation. After generation, the result list is refreshed with auto-added and manually entered members.

Creating Test Audiences

Click the Create Test Audiences button on the Audience Definition page to access the Create Test Audiences page.

Create Test Audiences

Source Audience

Audience Name Individual Consumer Audience	Status Committed
Owner Name Burt Lee	Last Update 10/14/2002 12:57PM
Type Fixed	Count 9

Test Audiences

Enter Number of Test Audiences

#	Audience Name	Percent	Limit	
1	Individual Consumer Au Test 1	10.00	10	
2	Individual Consumer Au Test 2	10.00	10	

Total

[Return to Audience Details](#)
[Process Monitor](#)

Create Test Audiences page

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

Note. The Create Test Audiences button is available only when an audience is in the status of generated, approved, or committed.

Enter Number of Test Audiences

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

Audience Name

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

Percent

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

Limit

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

Creating and Updating Segments

Access the Segment Detail page (click the Create a New Segment button on the Audiences page).

Segment

Save | Add Segment | Add Child Segment | Add Sibling Segment | Search | >>

Segment	Status In Design
Owner Burt Lee	Last Updated 08/25/2009 10:38AM

Segment Detail | Result List | Activities | Correspondence | Team | Costs | Notes

Segment Hierarchy

View Group ▼

Expand All | Collapse All

First ◀ **1-1 of 1** ▶ Last

[New Segment] - (0)

Segment Details

***Segment Name**

***Status** In Design ▼

Count 0

Last Generated

Parent Segment 🔍

***Segment Group** 🔍 📄

Owner 🔍

Last Updated 08/25/2009 10:38AM

Publish Segment

Segment Definition

Roles

- Contact for a Company
- Consumer
- Contact for a Partner
- Worker
- Person of Interest

Segment Detail page (1 of 2)

Segment Detail page (2 of 2)

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

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

Segment Hierarchy

You create segment hierarchies by defining parent-child relationships between segments. A segment can have multiple children, but only one parent. A child segment always inherits the selection criteria of its parents, and by default inherit its parent's owner attribute.

View Group

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

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

Segment Details

Segment Name

Enter a descriptive name for the segment.

Status

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

Parent Segment

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

Segment Group	Click the lookup button to select an existing segment group, or click the Add New Segment Group button to define a new one. Every segment must belong to a segment group.
Publish Segment	Select this check box if you want to make this segment available to the enterprise outside of PeopleSoft Marketing.

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

Segment Definition

Roles	A person is represented in the PeopleSoft CRM Customer Data Model as a <i>Contact for a Company</i> (a representative of a company), a <i>Consumer</i> , a <i>Contact for a Partner</i> (a representative of a partner), a <i>Worker</i> , or a <i>Person of Interest</i> . A person might appear as a contact multiple times, if the individual represents more than one company or has more than one role. You must select at least one option, but can select more than one to include all eligible records.
Selection Criteria	Selection criteria for segments are defined similarly to those for audiences. See Chapter 7, "Using Audiences," Creating and Updating Audiences, page 99.

Segment/Count Generation

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

See [Chapter 7, "Using Audiences," Creating and Updating Audiences, page 99.](#)

Defining a Segment Group

Access the Define Segment Group page (Set Up CRM, Product Related, Marketing, Audiences, Segment Groups).

Segment Group

Define Segment Group

*Segment Group ID

*Segment Group

*Status ▼

* Required Field

Define Segment Group page

A *segment group* is a means of arranging segments and segment hierarchies into logical groupings.

Segment Group ID	Enter a unique character ID for the segment; by default, the segment is assigned the next available ID number.
Segment Group	Enter a name for the segment group.
Status	Select <i>Active</i> to make the segment group available to have segments and hierarchies assigned to it; select <i>Inactive</i> to make it unavailable.

Associating Audiences and Segments with Activities

Access the Audiences - Activities or Segments - Activities page (Marketing, Manage Audiences, Activities).

Audience - Activities page

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

Note. You associate audiences and segments with activities during marketing campaign activity creation. This page is a view of existing data only, and you cannot attach an audience or segment to an activity from it.

Program	Displays the descriptive name of the campaign to which an activity that is associated with the audience or segment belongs. Click to access the Campaign Detail - Campaign Details page.
Activity (prompt)	Displays an activity with which the audience or segment is associated. Click to access the Campaign Detail - Activity Details page.
Activity	Select the campaign activity with which to associate the audience or segment. The association is made when the audience or segment is saved.

Creating Audience and Segment Plans

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

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

Associating Costs with an Audience or Segment

Access the Costs page (Marketing, Manage Audiences, Costs).

Audience

Save | Add Audience | Search | Next | Refresh | Clone | Export | Send SMS

Audience Consumers - CA **Status** Committed
Owner Jack Diamond **Last Updated** 03/11/2004 12:38PM

Audience Detail | Result List | Activities | Correspondence | Team | **Costs** | Notes

Record Costs Find | First 1 of 1 Last

*Cost Type	Variable	Unit Cost	Forecast Value	Actual Value
External Audience	Variable			

Add Cost Calculate Totals

Audience - Costs page

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

Cost Type Select the cost to be associated with the audience or segment.

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

Unit Cost Enter the cost of one unit.

Forecast Value Enter the expected cost of all units.

Actual Value Enter the actual cost of all units.

Viewing and Adding Audience or Segment Notes

Access the Notes page (Marketing, Manage Audiences, Notes).

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

See *and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Adding and Removing Audience Records

Access the Result List page (Marketing, Manage Audiences, Result List).

Audience Individual Consumer Audience
Owner [Burt Lee](#) **Status** Committed
Last Updated 10/14/2002 12:57PM

Audience Detail | **Result List** | Activities | Correspondence | Team | Costs | Notes

Status Filter

Generated
 Manually Added
 Deleted
 Refresh Results

Results Customize | Find | View All | First 1-9 of 9 Last

Last Name	First Name	Middle Name	Suffix	Status
Hudson	Michelle			Generated
Kennedy	Stone			Generated
Eyre	Jane			Generated
DeWinter	Janice			Generated
DeWinter	James			Generated
Bennett	Janie			Generated
Vincent	Jan			Generated
Myers	Jana			Generated
Pennington	Jay			Generated

Add Member Find Member

Audience - Result List page

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

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

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

Status Filter

Select the check boxes to specify which types of audience members you want to display, then click the Refresh Results button to apply your changes. The *Auto Added* and *Deleted* values are visible for all audience types; the *Manually Added* value is visible only for fixed audiences.

Results

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

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

Delete Click to remove selected records. The system removes the records when the page is saved. Manually added audience members that have been deleted must be manually re-added to the audience to restore them.

Restore Click the Restore Selected Rows button to restore previously deleted records. This button appears only when the audience contains previously deleted members.

Status Displays whether the audience member was auto added, manually added, or deleted.

Add Member Click to go to a search page where you can search for and add one or more members to the audience. The button is visible only for noncommitted fixed audiences. If the selected member does not exist, you can choose to add them; if the member is a duplicate, a message displays to let you know this.

Find Member Click to search for members to add to the audience. If the member you select already exists in the audience, an error message appears informing you of this fact. You can search on Last Name, First Name, and Name.

Note. Audience members are presumed to be duplicates if they have the same BO ID and role.

Checking for Duplicate Audience Members

When manually adding audience members, it is necessary to prevent duplicate members from being added to the audience. In the case of duplicate members, the member who is added to the audience (the "surviving member") depends on various factors. The following table illustrates some common scenarios and their expected outcomes:

Scenario	Outcome
<p>Audience A has an auto-added member, John Smith. John Smith is an active member.</p> <p>From the Add Member page, a user selects John Smith and attempts to manually add him to Audience A.</p>	<p>John Smith cannot be added as a duplicate member, because he already exists as an active member in the audience.</p>
<p>Audience A has an auto-added member, John Smith. John is not an active member.</p> <p>From the Add Member page, a user selects John Smith and attempts to manually add him to Audience A.</p>	<p>John Smith cannot be added as a duplicate member, because he already exists as a member. You can restore the inactive John Smith to active status.</p>
<p>Audience A has a manually added member, John Smith. John is an active member. Currently, there are no auto-added members.</p> <p>A user modifies Audience A to add a selection criterion of "First Name starts with J," then generates Audience A.</p>	<p>The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience A is the manually added John Smith, not the auto-added one.</p>
<p>Audience A has an auto added member, John Smith. John is an active member.</p> <p>Audience B has a manually added member, John Smith. John is an active member.</p> <p>A user merges Audience A with Audience B. The newly merged audience is Audience C.</p> <p>The user generates Audience C.</p>	<p>The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.</p>
<p>Audience A has an auto-added member, John Smith. John is not an active member.</p> <p>Audience B has a manually added member, John Smith. John is an active member.</p> <p>A user merges Audience A with Audience B. The newly merged audience is Audience C.</p> <p>The user generates Audience C.</p>	<p>The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.</p>
<p>Audience A has an auto-added member, John Smith. John is an active member.</p> <p>Audience B has a manually added member, John Smith. John is an active member.</p> <p>A user links Audience A with Audience B by using the audience membership selection criteria. The newly merged audience is Audience C.</p> <p>The user generates Audience C.</p>	<p>The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.</p>

Scenario	Outcome
<p>Audience A has an auto-added member, John Smith. John is not an active member.</p> <p>Audience B has a manually added member, John Smith. John is an active member.</p> <p>A user links Audience A with Audience B by using the audience membership selection criteria. The newly merged audience is Audience C.</p> <p>The user generates Audience C.</p>	<p>The audience generation program checks for duplicate members, and finds John Smith. The surviving member in Audience C is the manually added John Smith from Audience B.</p>

Customizing Your Audience Records Page

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

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

Managing Audience or Segment Correspondence

Access the Audiences - Correspondence or Segment - Correspondence page (Marketing, Audiences, Correspondence).

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

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

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

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

See [and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook](#), "Correspondence Management."

See [and Chapter 4, "Setting Up PeopleSoft Marketing and TeleSales," Defining Audience Information, page 54.](#)

See [and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook](#).

Defining Teams for an Audience

Access the Team page (Marketing, Manage Audiences, Team).

Save | Add Audience | Search | Next | Refresh | Clone | Send SMS

Audience Fall Event : Invitees **Status** In Design
Owner [Nori Sakai](#) **Last Updated** 08/05/2009 2:13AM

Audience Detail | Result List | Activities | Correspondence | Team | Costs | Notes

Team Members Customize | Find | | First 1-2 of 2 Last

Owner	*Name	
<input type="checkbox"/>	Burt Lee	
<input checked="" type="checkbox"/>	Nori Sakai	

Add Team Member

Team Roles Customize | Find | | First 1 of 1 Last

*Role Name	Description
<input type="text"/>	

Add Team Role

Marketing Center Information Customize | Find | View All | | First 1 of 1 Last

*Marketing Center	Description	Institution	Center Type
<input type="text"/>			

Add Marketing Center

Audience - Team page

Team Members

Owner Select this check box to designate the indicated person as the team owner.

Name Enter a name in the field or use the lookup to select one.

Add Team Member Click to add another row to the list.

Team Roles

Role Name Enter a role name or use the lookup to select one.

Add Team Role Click to add another row to the list.

Marketing Center Information

The Team page of the Audience Builder component includes a Marketing Center grid, allowing you to specify which team members have access to a prospect for the purpose of building audiences.

Marketing Center Search is only used when the CS_CONSTITUENT profile is selected as a selection criterion. The Marketing Center or its children selected must match the Marketing Center or its children that have been selected in the constituent's Academic Record.

You can add or delete Marketing Centers from the Team tab; it will show the Marketing Center, Marketing Center Description, Institution Description, and Center Type.

If Marketing Centers are added to the grid in addition to the team members and team roles, then users are authorized to access the audience if any of the following are true:

- The user is added as a team member.
- The user is part of the team role.
- The user is authorized to at least one of the specified Marketing Centers.

Note. In order to secure an audience, you must select the Secured Audience check box on the Audience Detail page.

See *and PeopleSoft CRM for Higher Education 9.1 PeopleBook*, "Using Marketing Center Security."

Using Delivered Active Analytics Framework Terms with Audiences

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

Marketing Interaction Data

The following AAF terms are available in the Marketing Contact History folder. All are of data type Number and Implementation Type SQL Object.

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

You can use marketing interaction contact frequency information to define audience search criteria in Audience Builder.

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

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



Contact History folder

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

Email and direct mail contacts are calculated from correspondence request interactions that were initiated from a campaign or audience.

Order History Data

You can define selection criteria using order history data.



Order History folder

The following Order History AAF terms are available under the Audience Builder Order History folder:

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

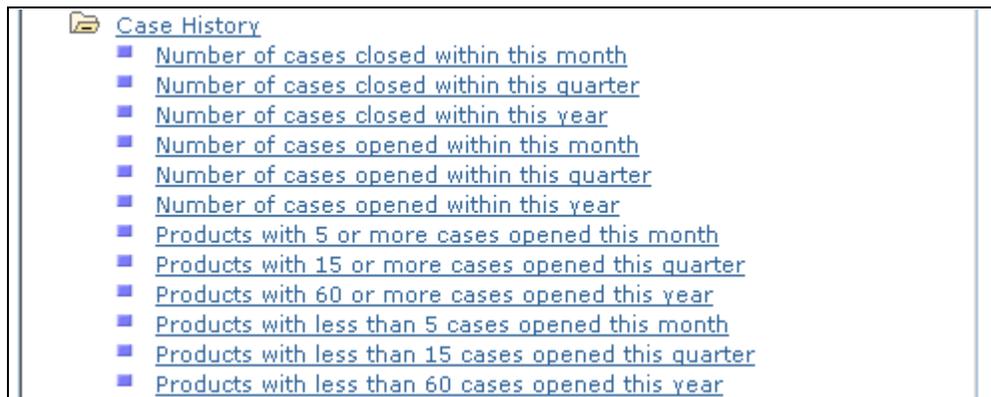
- Number of Orders this Month.*
- Number of Orders this Quarter.*
- Number of Orders this Year.*
- Number of Orders.*
- Number of Open Orders.**
- Total Order Amount this Month.*
- Total Order Amount this Quarter.*
- Total Order Amount this Year.*
- Total Order Amount.*
- Average Number of Products Per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

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

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

Case History Data

You can define selection criteria using case history data. Only the Contact for a Company role is supported for use in conjunction with Case History criteria.



Case History folder

The following Case History AAF terms are available under the Audience Builder Case History folder:

- Number of cases opened within this month.
- Number of cases opened within this quarter.
- Number of cases opened within this year.
- Number of cases closed within this month.

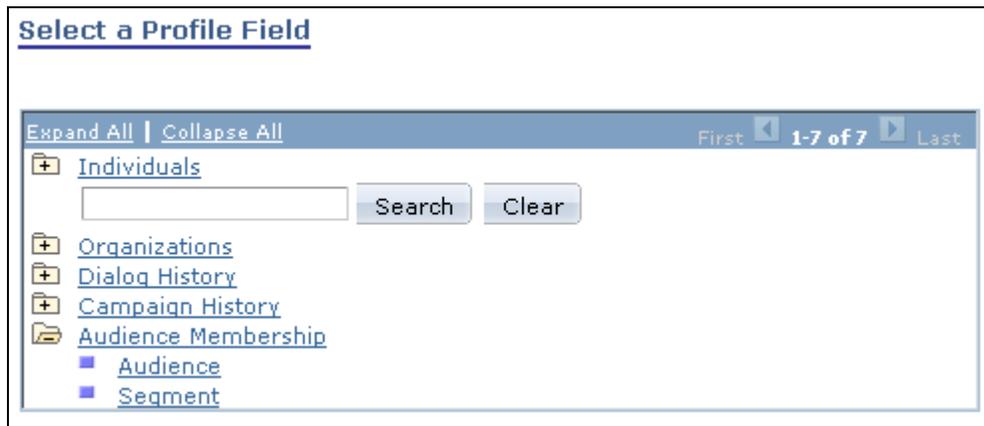
- Number of cases closed within this quarter.
- Number of cases closed within this year.
- Products with 5 or more cases opened this month.
- Products with 15 or more cases opened this month.
- Products with 60 or more cases opened this month.
- Products with fewer than 5 cases opened this month.
- Products with fewer than 15 cases opened this month.
- Products with fewer than 60 cases opened this month.

Using History and Audience Membership Data with Audiences

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

Audience and Segment Membership

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



Audience Membership folder

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

See [and Chapter 7, "Using Audiences," Creating and Updating Audiences, page 99.](#)

Marketing Execution and Response Data

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

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



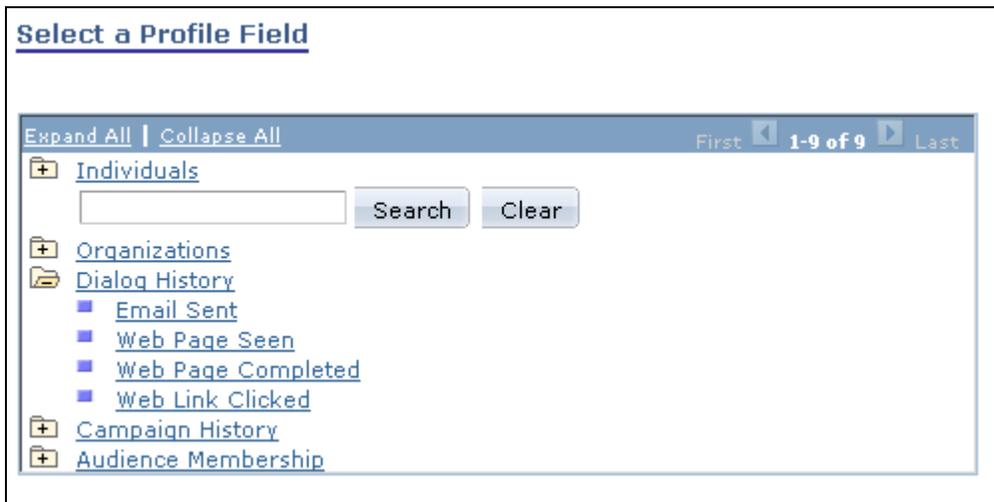
Campaign History folder

Data Item	Description
Campaign Activity Executed	Choose from a list of completed campaign activities. The query returns all individuals who were targeted (or not targeted) by the identified campaign activity through correspondence management email or direct mail, or a telesales call.
Lead Accepted	Choose from a list of completed campaign activities. The query returns all individuals whose sales lead created by that campaign activity was accepted (or not accepted).
Order Placed	Choose from a list of completed campaign activities. The query returns all individuals who have (or have not) placed an order and referenced the campaign activity's promotion code.

Dialog Execution and Response Data

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

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

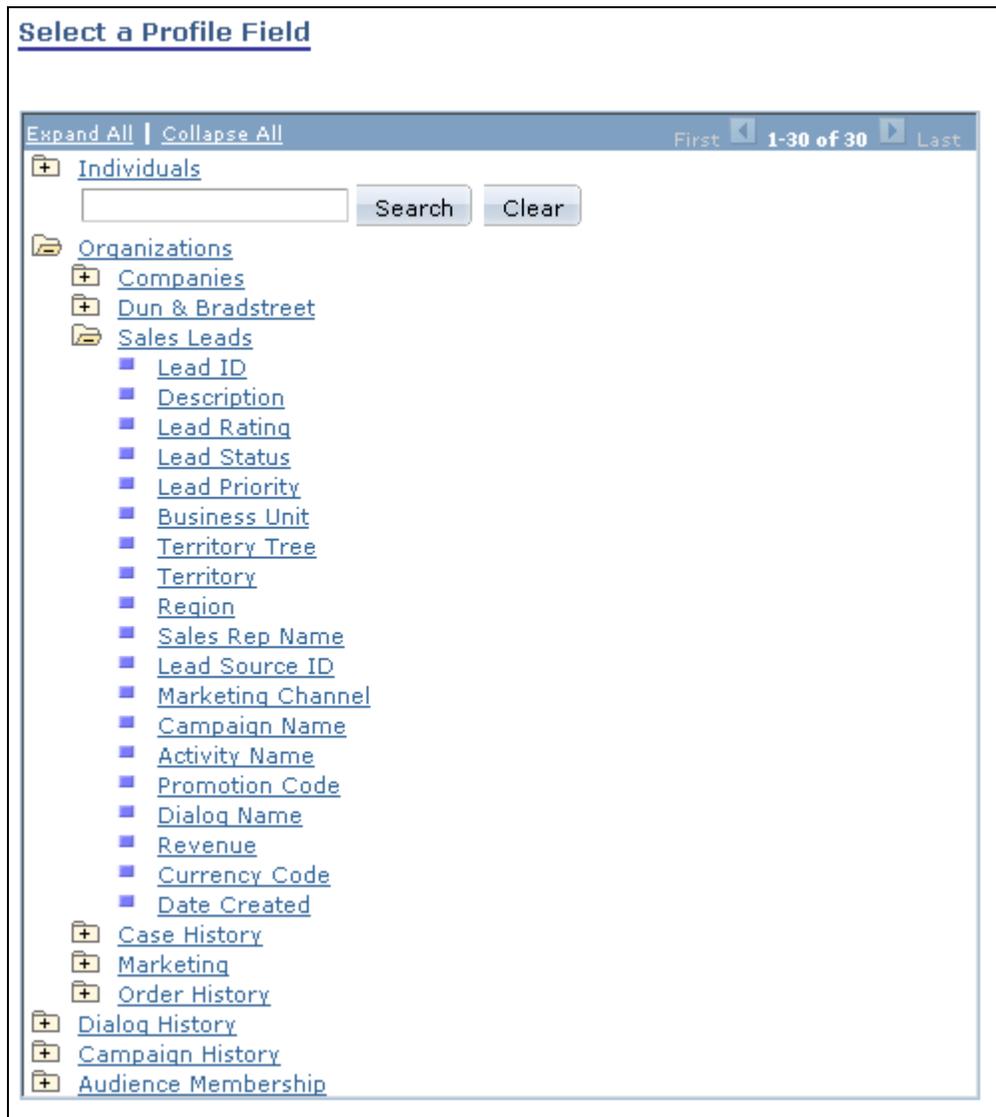


Dialog History folder

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

Using the Sales Leads Profile with Audiences

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



Sales Leads profile fields

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

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

Using the Event Participants Profile with Audiences

The following Event Participants profile fields, which are part of the Individuals profiles, are available in Audience Builder for defining selection criteria:



Event Participants profile fields

Data Item	Description	Field Type
Event ID	The ID of the event in the Event Management tables.	Map Field Choice to Prompt
Invited	All participants from the Event Management tables that have been marked as <i>Invited</i> .	Yes/No
Attended	All participants from the Event Management tables that have been marked as <i>Attended</i> .	Yes/No

Data Item	Description	Field Type
Future Notification	All participants in the Event Management tables that have been marked as <i>Future Notification</i> (that is, those who are interested in being contacted for future events).	Yes/No
Registration Status	One of three options: <i>Registered</i> , <i>Declined</i> , or <i>Waitlisted</i> .	Choose One

These profile names are available for the Consumer, Contact for Consumer, Contact for Partner, and Worker roles.

Defining Active Analytics Framework Terms for Audiences

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

See *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

AAF Resolution Methods

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

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

AAF Implementation Limitations

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

- Only contextual implementations that have been defined for and which are associated with the Audience Builder component context are allowed.
- Only implementations that have binds BO_ID_PERSON or BO_ID_CUSTOMER are supported.

One or the other of these two binds is required.

- Only implementations with the following return data types are supported:
 - String
 - String Array
 - Number
 - Number Array
 - Date
 - Date Array
 - Time
 - Time Array
- SQL Object implementations must return a *single* column only.
- Meta-SQL is not supported in audience queries.

Meta-SQL that cannot be resolved by Audience Builder itself cannot be used within SQL Objects' SQL text or Record.Field's Where clauses. Audience Builder can resolve only the following Meta-SQL terms:

- %DateIn
- %TimeIn
- %DateTimeIn
- %CurrentDateIn
- %CurrentTimeIn
- %CurrentDateTimeIn
- %Upper

AAF Term Requirements

The following requirements must be met of any AAF term that is available to the Audience Builder:

- The return data type must be a scalar type of string, number, date, time, or datetime.
- The Number of Values attribute can be either one or many.
- The term must have an Audience Builder contextual implementation defined.

The implementation must meet the requirements noted previously for supported implementations and resolution methods.

Supported Operators

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

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

WITH Clauses

With clauses are supported between multiple terms if each term meets the following criteria:

- Uses the Audience Select Record.Field implementation.

- References the same record name in the implementation.
- Has identical binds and where clauses defined in the implementation.
- Returns multiple values.

With clauses function in the same way as they do for Many-Row profile fields; with clauses are available only in advanced mode.

Criteria Value Prompting

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

- Prompt (prompt table)
- Translate (XLAT)

Multi-select prompting is not supported.

Exporting Audiences for Use Outside the PeopleSoft CRM Application Suite

This section provides an overview of audience export and discusses how to export an audience.

Understanding Audience Export

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

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

Page Used to Export Audiences

Page Name	Definition Name	Navigation	Usage
Export Audience	RA_EXPORT_AUDIENCE	Click the Export button on the Audience page toolbar.	Create a version of an audience in a common file format that you can export for use outside the PeopleSoft CRM application suite.

Exporting an Audience

Access the Export Audience page (Click the Export button on the Audience page toolbar).

Export Audience

Source Audience

Audience Name Company Contact, "A"	Status Generated
Owner Name Burt Lee	Last Update 03/16/2006 9:29AM
Type Fixed	Count 28

Export File

***Description**

***File Name**

Status Pending

Export Columns			Customize First 1-8 of 8 Last
Order	Profile Field		
<input type="radio"/>	1	Individuals.People.First Name	
<input type="radio"/>	2	Individuals.People.Last Name	
<input type="radio"/>	3	Individuals.People.Social Security Number	
<input type="radio"/>	4	Individuals.People.Address1	
<input type="radio"/>	5	Individuals.People.Address2	
<input type="radio"/>	6	Individuals.People.City	
<input type="radio"/>	7	Individuals.People.State	
<input type="radio"/>	8	Individuals.People.ZIP Code	

Choose Columns to Export

- Individuals
 - CS-Appl Academic
 - CS-Appl Academic History
 - CS-Appl Biographic
 - CS-Appl Employment
 - CS-Appl Honors Awards Extra Curr
 - CS-Appl Parents Emerq Contact
 - CS-Person
 - PUPD ICE
 - People
 - ProfICE
 - Test Prof1
 - test
- Organizations
 - Companies
 - Dun & Bradstreet

[Return to Audience Details](#)
[Process Monitor](#)

Export Audience page

Description Enter a description of the audience.

File Name Displays a file name for the export file. The system automatically creates this name; you can change it if desired.

Selecting Profile Fields to Export

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

Arranging the Export Columns Order

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

Note. Changing the Export Columns order after you have created an export audience does not change the order in the created file. To change the order, you must rerun the process.

Exporting the File

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

Sending SMS Messages to Audiences

You can specify outbound SMS messages to be sent to audiences.

Pages Used to Send SMS Messages to Audiences

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Audiences	RA_LIST_SUMMARY	Marketing, Manage Audiences	Create and update audiences.
SMS Request	RB_SMS_REQUEST	Click the Send SMS button in the Audiences page Toolbar.	Specify details about SMS messages to be sent to audiences.

Sending an SMS Message

To send an SMS message, click the Send SMS button on the Audience page toolbar (Marketing, Manage Audiences).

Audience

Save | Add Audience | Search | Next | Refresh | Clone | Export | Send SMS

Audience Fall 2010 Event : Invitees **Status** Committed
Owner [Melissa Green](#) **Last Updated** 09/16/2009 3:45PM

Audience page toolbar

Specifying SMS Message Details

Access the SMS Request page (click the Send SMS button on the Audience page toolbar).

SMS Request History Select One... Personalize

Save | Search | Send | Cancel

Source Marketing **Status** New

Request Detail

*Description Create SMS request from audience.

Template Name Send in Language English

(Note: The template and Language will be ignored if the message text is modified.)

Message

Processing Foreground Background

Background Schedule

Send Immediately Send on Date Time

Note: Delivery of text messages cannot be guaranteed. They are for informational purposes only. Standard text messaging rates will apply and other charges may also apply to recipient's mobile account.

Audience List

SetID	Audience ID	Audience Name	Audience Type
PSUNV	LST000000300052	Fall 2010 Event : Invitees	Fixed Audience

Audit History

Created	09/17/2009 2:49PM PDT	By DCG	Don Gillespie
Modified	09/17/2009 2:49PM PDT	By DCG	Don Gillespie

SMS Request page

Using this page, you can select an SMS message template and click the Submit button to send the SMS message.

Template Name Select a template from the available list.

Send in Language	Specify the language in which you want the message to be sent. In order to send a message in a selected language, the message must have been defined in that language during the setup process.
Processing	Select <i>Foreground</i> or <i>Background</i> . The default is <i>Background</i> .
Background Schedule	If you specified <i>Background</i> in the Processing field, you can specify whether you want the SMS message to be sent immediately or at a later date and time.
Audience List	The audience from which you arrived at this page is displayed in this grid. Note that audiences must be in the <i>Approved</i> or <i>Committed</i> state in order to send SMS messages to them. If the audience is in another state, an error message displays when you attempt to send the message.
History	You can return to the audience from which you reached this page by selecting its name from the History list.

See *and PeopleSoft Online Marketing 9.1 PeopleBook*, "Setting Up PeopleSoft Online Marketing," Setting Up SMS.

Chapter 8

Using PeopleSoft Marketing Workflow

This chapter discusses how to configure the delivered workflow for:

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

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Configuring the Delivered Workflow for Campaigns and Campaign Tasks

The following table shows the delivered workflow for campaigns:

<i>Campaign Policy Name</i>	<i>Trigger Point Name</i>	<i>Action Name</i>	<i>Role Name</i>	<i>Correspondence Package</i>	<i>Mode</i>
Campaign Status changed to <i>Stopped</i> .	After a Campaign is Saved	Worklist to Campaign Manager	Marketing Campaign RoleUser		
		TimeOut Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	Async after 5 minute delay
		Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	

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

The following table shows the delivered workflow for campaign tasks:

Campaign Task Policy Name	Trigger Point Name	Action Name	Role Name	Correspondence Package	Mode
Campaign Task Status is changed to <i>Rejected</i> .	After a Campaign is Saved	Email to Campaign Task Owner	Marketing Campaign Task Owner	Campaign Task Status Changed	
		Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Task Status Changed	
Campaign Task Status is changed to <i>Assigned</i> .	After a Campaign is Saved	Email to Task Assignee	Marketing Campaign Task Assignee	Campaign Task Status Changed	

Campaign Task Policy Name	Trigger Point Name	Action Name	Role Name	Correspondence Package	Mode
Campaign Task Status is changed to <i>Completed.</i>	After a Campaign is Saved	Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Task Status Changed	
Campaign Task Status is changed to <i>Over Due.</i>	After a Campaign is Saved	Worklist to Campaign Task Assignee	Marketing Campaign Task Assignee		
		TimeOut Email to Campaign Manager	Marketing Campaign RoleUser	Campaign Task Status Changed	
Marketing Auto List Load	After a Campaign is Saved				

Configuring Delivered Workflow for Content and Content Tasks

The following table shows the delivered workflow for content:

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

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

The following table shows the delivered workflow for content tasks:

Content Task Policy Name	Trigger Point Name	Action Name	Role Name	Correspondence Package	Mode
Content task status changed to <i>Assigned</i> .	After a Content is Saved	Content Task Worklist	Marketing Content Task Assignee		
		Content Task Email	Marketing Content Task Assignee	Content Task Status Change	
		Content Task Email	Marketing Content Task Assignee	Content Task Status Change	Async after 5 minute delay
Content task status changed to <i>Completed</i> .	After a Content is Saved	Content Task Worklist	Marketing Content Task Owner		
Content task status changed to <i>Over Due</i> .	After a Content is Saved	Content Task TimeOut	Marketing Content Task Assignee	Content Task Status Change	Async after 1200 minute delay
Content task status changed to <i>Rejected</i> .	After a Content is Saved	Content Task Worklist	Marketing Content Task Owner		

Configuring Delivered Workflow for Offers

The following table shows the delivered workflow for offers:

Offer Policy Name	Trigger Point Name	Action Name	Role Name	Correspondence Package	Mode
Offer status is changed to <i>Planning</i> .	After an Offer is Saved	Offer Email to Owner	Marketing Offer Owner	Offer Status Changed	Sync
Offer status is changed to <i>InReview</i> .	After an Offer is Saved	Offer Email to Owner	Marketing Offer Owner	Offer Status Changed	Sync
		Offer Email to Owner	Marketing Offer Owner	Offer Status Changed	Async after 5 minute delay
Offer status is changed to <i>Completed</i>	After an Offer is Saved	Offer Worklist	Marketing Offer Owner	NA	Sync
Offer status is changed to <i>Declined</i> .	After an Offer is Saved	Offer Worklist	Marketing Offer Owner	NA	Sync

Chapter 9

Creating Campaigns and Activities

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

- Create campaigns.
- Generate sales leads and telesales prospects.

Understanding Campaigns and Activities

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

This section discusses:

- Campaign structure.
- Roll ups.
- Campaign characteristics.
- Activity characteristics.

Associate audiences, offers, collateral, and scripts with activities.

- Campaign triggers.
- Tasks associated with campaigns.
- Campaign and activity status.
- Campaign objects associated with activities.

Campaign Structure

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

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

Marketing Programs

The term *marketing program* refers collectively to the types of marketing campaigns that you can define. The four types of marketing programs are:

- Campaigns.
- Roll ups.
- Dialogs.
- Events.

Campaigns and roll ups are discussed in this chapter. Dialogs are discussed in the Online Marketing documentation. Events are discussed in the CRM for Higher Education documentation.

See *and PeopleSoft Online Marketing 9.1 PeopleBook*.

See *and PeopleSoft CRM for Higher Education 9.1 PeopleBook*, "Oracle's PeopleSoft CRM for Higher Education Preface."

Roll Ups

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

Note. You designate marketing programs as roll ups so that you can establish campaign hierarchies. Marketing programs function the same, whether they are roll ups or standard campaigns. A *roll up* occupies the highest level of the PeopleSoft Marketing hierarchy and contains one or more standard *campaigns* or *dialogs*. The Marketing Program page for a roll up lists its child campaigns and dialogs, if any exist.

Campaign Characteristics

Every campaign has the following characteristics:

Campaign objective	An effective campaign combines various marketing activities in a concerted effort to achieve one central goal, or campaign <i>objective</i> .
Campaign team	A campaign team represents people who are responsible for or interested in the results of the campaign. A campaign team can include not only <i>workers</i> (employees), but also other <i>companies, sites, partners, and partner contacts</i> . Including someone in the campaign team enables workflow functionality. You assign the campaign team on the Plan Campaign Program or Plan Rollup Program page.
Campaign owner	The campaign owner is an employee who is responsible for the campaign. A campaign owner: <ul style="list-style-type: none"> • Takes responsibility for the successful design and implementation of a campaign. • Is functionally the same as any other employee. • Serves as campaign manager.

Activity Characteristics

Every activity has the following characteristics:

Budget	The money that is allocated for the activity.
Activity Type	The tactic that you use to influence the target audience.
Marketing Channel	The medium that you use to deliver the message.
Channel Detail	A specific media outlet that you use to deliver the message.

Define activity characteristics on the Campaigns - Activity Detail page.

Activity Budgets and Costs

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

The system verifies budget amounts—it checks activity budgets within the overall budget of the campaign and checks the campaign overall budget against the roll up budget (if one exists). If any of the budgets are exceeded, the system displays a warning. As an example, assume Roll up A has two child campaigns, Campaign B and Campaign C. If the budget for Roll up A is \$10,000, for Campaign B is \$7,000, and for Campaign C is \$5,000, a warning message appears because the total of the two child campaigns' budgets, \$12,000, exceeds the \$10,000 roll up budget. Likewise, if Campaign B (budget \$7,000) has two activities that each have budgets of \$4,000, a warning appears because the activity budgets exceed the campaign budget.

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

Note. Child programs using different currency codes can be added to roll ups—the budget of the roll up takes this into account.

Activity Type

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

Marketing Channel and Channel Detail

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

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

Associating Audiences, Offers, Collateral, and Scripts with Activities

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

Audience

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

Offer

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

- Product list.
- Price rules (complex or simple pricing structure that includes product discounts and giveaways).

- Dates when the offer is valid.

Collateral

Collateral (sometimes also called *content*) includes all the material that you produce to support a campaign, for use both inside and outside the organization. Examples of collateral include:

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

Scripts

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

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

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

Note. Only the script name, not its type (inbound or outbound) is displayed.

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

Note. You cannot run scripts within the PeopleSoft Marketing application. You can run them using various other PeopleSoft CRM applications, including PeopleSoft TeleSales. You associate scripts with activities within PeopleSoft Marketing for use by the PeopleSoft TeleSales application.

See Also

[Chapter 7, "Using Audiences," page 91](#)

[Chapter 6, "Using Offers," page 75](#)

[Chapter 5, "Creating Campaign Collateral," page 65](#)

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Defining Scripts"

Campaign Triggers

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

Trigger Schedules

Using triggers, you can initiate up to six actions:

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

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

Tasks Associated with Campaigns

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

You select tasks to add to the campaign by using the Task or Task Sets drop-down list boxes on the Program Tasks summary page. You maintain tasks on the Program Task Detail page by clicking the task name or by modifying the task data within the summary grid. You associate tasks with campaigns on the Marketing Programs - Tasks page.

Campaign and Activity Status

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

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

Common Elements Used in This Chapter



Clone this Campaign

Click to clone this campaign.

Note. Cloned campaigns duplicate everything in the campaign definition except triggers and audiences.



Email

Click to email campaign information to recipients.



Calendar

Click to view the Marketing Calendar.



Reporting

Click to display Interactive Reports that you can use to analyze the marketing programs.



Add Program

Click to access the Marketing Program Add page, where you can add new marketing programs.



Next

Click to display the next program in the list.



Previous

Display the previous program in the list.

Creating Campaigns

This section discusses how to:

- Manage campaigns.
- Define campaigns.
- Access activities and attach additional activities to campaigns.
- Define activities.
- Use triggers.
- Define a trigger.
- Define campaign tasks.
- Create and update campaign tasks.
- View the cost summary.
- Work with campaign audiences.
- Measure campaign effectiveness.
- Use campaign notes.
- View campaign history.

- View the Marketing Calendar.

Pages Used to Create Campaigns

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Marketing Program Search	RA_CM_HOME_GRD	Marketing, Marketing Programs	View a list of marketing campaigns, access existing campaigns, and add new campaigns.
Marketing Program Add	RA_PROGRAM_ADD	On the Marketing Program Search page, select the Marketing Program Add tab	Use to add a new marketing program (campaign, dialog, event, or roll up).
Marketing Programs - Plan Campaign Program	RA_CAMPAIGN_DETAIL	Click the program name on the Program Management page.	Define new marketing campaign programs or edit existing ones.
Marketing Programs - Activity Summary	RA_CMPGN_ACTIVITY	Marketing, Marketing Programs, Plan Campaign Programs, Activities	Access existing activities and attach additional activities to the campaign.
Marketing Programs - Team	RA_CAMPAIGN_TEAM	Marketing, Marketing Programs, Plan Campaign Programs, Team	Specify team members for the campaign.
Marketing Programs - Triggers	RA_CAMPAIGN_TRIGER	Marketing, Marketing Programs, Plan Campaign Programs, Triggers	View summary information about existing triggers and add new triggers.
Marketing Programs - Tasks	RA_CAMPAIGN_TASK	Marketing, Marketing Programs, Plan Campaign Program, Tasks	View existing campaign tasks and add new tasks.
Marketing Program Tasks - Task Detail	RA_PGM_TASKDTL	Marketing, Marketing Programs, Plan Campaign Programs, Tasks Click the Add Task button.	Add detailed information about a campaign task.
Marketing Programs - Cost Summary	RA_CAMPAIGN_COSTS	Marketing, Marketing Programs, Plan Campaign Program, Cost Summary	View all costs associated with the campaign including all activities. Costs are summarized by activity and by cost type.
Marketing Programs - Audience	RA_CM_LIST_SUMRY	Marketing, Marketing Programs, Plan Campaign Program, Audience	Attach target audience lists to campaigns.
Marketing Programs - Performance	RA_CMPGN_METRICS	Marketing, Marketing Programs, Plan Campaign Program, Performance	Measure the effectiveness of marketing campaigns.

Page Name	Definition Name	Navigation	Usage
Marketing Programs - Notes	RA_CAMPAIGN_NOTES	Marketing, Marketing Programs, Plan Campaign Program, Notes	View descriptions of campaign notes; add new notes.
Marketing Programs - History	RA_CMPGN_HISTORY	Marketing, Marketing Programs, Plan Campaign Program, History	View the audit and interaction information associated with the campaign.
Marketing Programs - Attributes	RB_ATTR_RUN_CMPG	Click the View Attributes link on the Plan Campaign Program page.	View campaign attributes.
Marketing Calendar	RA_CALENDAR	Marketing, Marketing Calendar or Click the Marketing Calendar button on the Plan Campaign Program page.	View the time relationships of all campaigns.

Managing Campaigns

Access the Marketing Program Search page (Marketing, Marketing Programs).

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

To add a new campaign, access the Marketing Program Add page (select the Marketing Program Add tab).

Note. The Marketing Program Search page is a configurable search page. You can configure this page to suit your personal search needs. Refer to the *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook* for complete information.

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

Defining Campaigns

Access the Marketing Programs - Plan Campaign Program page (Click the program name on the Program Management page).

Marketing Programs

Save Refresh | Notification | Clone | Calendar | Reporting | >> Personalize

Program Lead Generation **Status** Approved
Start Date 01/09/2001 **Program Type** Campaign
End Date 12/31/2010 **ID** TL101

Program | **Activities (1)** | Team | Triggers | Tasks (1) | Cost Summary | Audience | Performance | ▶

Go To Select One... ▼

Plan Campaign Program

Name Lead Generation **Roll up Program** []

Objective Internal ▼ ***Status** Approved ▼

***Owner** Brian Gibbs [] ***Start Date** 01/09/2001 [] ***End Date** 12/31/2010 []

***Currency** US Dollar ▼ **Industry** All Industries []

Description Lead Generation to Telesales and Sales Force for Product Lines []

Secure Campaign by Team Member

Sponsors and Budgets

Customize | Find | [] | [] | First 1-2 of 2 Last

Sponsor Name	External	Budget Source	Budget Amount
Field and Sales Marketing []	<input type="checkbox"/>	Marketing Budget ▼	60,000.00 []
GBI Inc. []	<input type="checkbox"/>	General Budget ▼	1,000,000.00 []

Add a New Sponsor / Budget

Marketing Programs - Plan Campaign Program (1 of 2)

Record Program Costs

Customize | Find | View All | [] | [] | First 1 of 1 Last

*Cost Type	Components	Variable	Unit Cost	Planned Cost	Actual Cost
Market Rese. ▼	Administrative	Variable	[]	5,000.00	8,734.23 []
Totals				5,000.00	8,734.23

Calculate Add a New Cost

Go To [View Attributes](#)

Save Refresh | Notification | Clone | Calendar | Reporting | >> Top of Page

* Required Field

Marketing Programs - Plan Campaign Program page (2 of 2)

Plan Campaign Program

Name

Enter a descriptive code to identify the campaign.

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

Roll up Program	If this campaign is part of a roll up, select the descriptive name of the parent roll up of which this campaign is a part.
Objective	Select an objective from the available options to describe what you will accomplish with this campaign.
Status	Select the position of the campaign in its life cycle. <hr/> Note. When the campaign status is set to <i>Executing</i> or <i>Approved</i> , nothing in the definition can be changed without changing the campaign status. <hr/>
Owner	Displays the descriptive name of the user who is primarily responsible for the campaign.
Start Date and End Date	Enter the date when the campaign begins and ends. Start and end dates for campaigns that are part of a roll up campaign must be within the range of the parent campaign.
Currency	Select the monetary unit with which the campaign is funded.
Industry	Select an industry group from the lookup.
Description	Enter a detailed description of the campaign.
Secure Campaign by Team Member	Select this check box to if you want a security verification process to be performed to determine if the user has authority to view the campaign. If this option is not selected, the campaign is considered to be unsecured, and all users will have access to it.

Campaign Sponsors

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

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

Sponsor Name	Select a sponsor name from the lookup table.
External	Select this check box if the sponsor is external (for example, a partner or partner contact).
Budget Source	Select the department that is funding the campaign.
Budget Amount	Enter the amount of money allocated for the campaign.

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

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

See *and PeopleSoft Partner Relationship Management 9.1 PeopleBook*.

Record Program Costs

The Record Program Costs section enables you to keep a record of costs not associated with any other component; that is, costs that relate to the campaign as a whole.

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

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

Components Displays the category to which the cost belongs.

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

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

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

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

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

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

Calculate Click to calculate total values.

Add a New Cost Click to add a new cost.

Child Programs

This section appears only if the marketing program is a roll up that contains one or more child campaigns or dialogs. Each campaign or dialog name is listed with its type, name, and budget.

Target Academic Term

This section appears only if the Higher Education option is enabled on the General Options page. Enter applicable academic information, such as institution, career and admit term for the marketing program.

Enter an admit term if you run the *Recruiting Performance* Fusion Intelligence reports off of the *CSW: Recruiting & Admissions* Interactive Dashboard.

Go To

View Attributes

Click to access the Attributes page. The Attributes page displays any defined attributes associated with the campaign. When selected, the Attributes page is included in the component tab navigation until you exit this campaign and select another.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences"

Accessing Activities and Attaching Additional Activities to Campaigns

Access the Marketing Programs - Activity Summary page (Marketing, Marketing Programs, Plan Campaign Programs, Activities).

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

Activity Name

Click the activity name of a campaign to access details about the activity, where you can define additional activity attributes for the selected activity.

Add a New Activity

Click to add a new activity.

Note. When adding a new activity, the system generates an activity name related to the name of the campaign. You can enter a new activity name.

Clone Selected Activity

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

Defining Activities

Access the Marketing Programs - Activities page (Marketing, Marketing Programs, Plan Campaign Programs, Activities).

Marketing Programs

Save Refresh | Notification | Clone | Calendar | Reporting | >> Personalize

Program Lead Generation	Status Approved
Start Date 01/09/2001	Program Type Campaign
End Date 12/31/2010	ID TL101

Program Activities (1) Team Triggers Tasks (1) Cost Summary Audience Performance Go To Select One...

Activity Summary Customize Find View All First 1 of 1 Last

General Budget and Objective Audience and Offers Collateral and Script

Activity Name	Status	Start Date	End Date	End Response	Activity Type	Marketing Channel
<input type="checkbox"/> Internal Email Blast - Kick Off!	New	01/01/2002	12/31/2002	12/31/2002	Internal	Intranet

Clone Selected Activity Add a New Activity

Activity Detail

Activity Internal Email Blast - Kick Off!	Promotion COM01TL101WVE0250002
Status New <input type="button" value="v"/>	ID WVE0250002
Objective Internal <input type="button" value="v"/>	Priority Medium <input type="button" value="v"/>
Budget 8,000.00	*Start Date 01/01/2002 <input type="button" value="c"/>
	*End Date 12/31/2002 <input type="button" value="c"/>
	End Response 12/31/2002 <input type="button" value="c"/>

Channel

*Activity Type Internal <input type="button" value="m"/>	*Marketing Channel Intranet <input type="button" value="m"/>
Audience Internal Workforce <input type="button" value="m"/>	Collateral <input type="button" value="m"/>
Offer <input type="button" value="m"/>	Script Name <input type="button" value="m"/>

Marketing Programs - Activities page (1 of 2)

Record Costs					
*Cost Type	Components	Variable	Unit Cost	Planned Cost	Actual Cost
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add a New Activity Cost		Calculate Costs		Totals <input type="text"/>	

Review Activity Performance Metrics					
*Metric	UOM	Forecast Value	Actual Value	Difference	
Number of Targeted	Count	40,000.00		-40,000.00	<input type="button" value="Edit"/>
Add a new Metric		Generation Date 08/25/2009 12:33PM		<input type="button" value="Recalculate"/>	

Activity Notes Summary

No notes have been added to this activity.

Save Refresh | [Notification](#) | [Clone](#) | [Calendar](#) | [Reporting](#) | >> [Top of Page](#)

* Required Field

Marketing Programs - Activities page (2 of 2)

Activity Detail

- Activity** Enter a descriptive name to identify the activity.
-
- Note.** Activity names do not need to be unique. However, duplicate activity names might confuse users.
-
- Promotion** A unique code that identifies the activity. This code is generated automatically. Promotion is used to integrate PeopleSoft Marketing with PeopleSoft Order Capture by associating the order with the offer that is on the activity record.
- Status** Displays the position of the activity in its life cycle.
-
- Note.** Only activities with a status of New can be deleted. Further, after an activity has been placed in Stopped status, none of its associated components (such as Offer, Audience, or Collateral) can be deleted.
-
- Start Date and End Date** Enter the dates when the activity begins and ends. The activity start date cannot precede the campaign start date. The end date cannot exceed the campaign end date.
- Objective** Select the objective that describes the purpose of this activity.
- Priority** Select the priority of the activity. Your priority selection determines how multiple campaign activities are sorted for use by telesales.

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

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

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

Channel

A *channel* is used to get the message to the audience. A full channel definition requires selection of both an activity and a marketing channel. Under certain circumstances, a channel detail selection is needed as well.

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

Activity, marketing channel, and channel detail values are defined in setup.

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

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

Channel Detail This field appears only when the activity is *Broadcast* and the marketing channel is TV or Radio.

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

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

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

Collateral If the channel execution is *TeleSales*, *Sales Force*, *Order Capture*, or *Mail Correspondence*, select the collateral that you want to attach to the activity.

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

Script Name

If the channel execution is *TeleSales* or *Order Capture*, select the script to be used when the activity runs.

Because different channel types have different scripts associated with them, if an activity's channel type is changed (for example, from *TeleSales* to *Order Capture*) the *Script Name* field is cleared and must be reselected.

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

Integration Method

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

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

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

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

Advisor

This lookup field appears when you select an activity type of *In Bound* and a marketing channel of *Advisor*. It enables you to attach an Active Analytics Framework action to an activity.

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

See *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Correspondence Management."

See *PeopleSoft Real-Time Advisor 9.1 PeopleBook*.

Description for Sales Team

This section displays descriptive information about the activity to give Sales users details about the originating campaign so that they can make good decisions about the processing of generated leads and their resultant opportunities. Note that this information appears only if one of the following conditions is met:

- The marketing channel is a sales agent.
- The marketing channel is *TeleSales* and the *Integration* field is set to *Sales Leads*.

If neither of these two conditions is met, then the fields described in this section do not appear.

Note. A marketing activity cannot be moved to *Approved* status if either of the fields in this section are left blank.

Summary Because sales users do not always understand the marketing jargon used in the marketing-oriented activity description, this field gives the campaign or marketing manager a place to include a description more tailored to the sales user's needs to aid the user in operating on the lead within proper context.

Call To Action Specify appropriate follow-up actions to help the sales user correctly interpret and convert the generated lead.

See *and PeopleSoft Sales 9.1 PeopleBook*.

Active Analytic Framework Policies

This grid appears when you create a new activity and set the activity type to *Inbound* and the marketing channel to *Advisor*. If you select a trigger point and click the Create Policies button, you can create a new Active Analytics Framework policy. After you have created the policy and linked it to the campaign activity, the policy information appears in the grid.

Trigger Point Select a trigger point from the available options.

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

See *and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

Record Costs

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

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

Components Displays the category to which the cost belongs.

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

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

Note. This field is editable only when the cost type is Variable.

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

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

Totals	The sum of all planned costs and the sum of all actual costs.
Calculate	Click to calculate total values.
Add a New Activity Cost	Click to add a new cost.

See and [Chapter 4, "Setting Up PeopleSoft Marketing and TeleSales," Defining Cost Elements, page 51.](#)

Review Activity Performance Metrics

Select the terms by which to measure campaign performance.

Metric	Select the metric by which to measure activity performance.
UOM (unit of measure)	Displays the unit of measure in which the metric is calculated.
Forecast Value	Enter the result that you expect the activity to produce.
Actual Value	Displays the result that the activity actually produces. The system populates this field with data from various tables and sometimes from multiple applications (such as PeopleSoft Sales and PeopleSoft Call Center).
Difference	Displays any difference between the forecast and actual values. Over expenditures appear as a negative number.
Add a New Activity Metric	Click to add additional activity metrics.
Recalculate	Recalculates all attached metrics.

Note. All existing metrics are calculated when you access the Activity Detail page for the first time.

See and [Chapter 4, "Setting Up PeopleSoft Marketing and TeleSales," Defining and Creating Metrics, page 43.](#)

Activity Notes Summary

This section contains a list of any notes that have been associated with the activity. An Add Activity Note button on the main activity page enables you to create additional notes to associate with the activity. Activity notes can include attachments.

Using Triggers

Access the Marketing Programs - Triggers page (Marketing, Marketing Programs, Plan Campaign Programs, Triggers).

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

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

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

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

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

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

Note. A trigger can be deleted until it has finished.

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

Trigger Type

Select a trigger type. The trigger type determines when the system runs action requests and controls the field display on the Trigger Detail page.

Values are:

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

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

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

Add

Click to add the selected trigger type.

Defining Team Members

Access the Marketing Programs - Team page.

Marketing Programs

Save Refresh | Notification Clone Calendar Reporting | >> Personalize

Program Start Date End Date Status New Program Type ID NEXT

Program Activities (0) Team Triggers Tasks (0) Cost Summary Audience Performance

Go To Select One...

Team Members

Customize Find View All First 1 of 1 Last

Owner	Name	Telephone	Email Address	Role Name
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Team Member

Team Roles

Customize Find View All First 1 of 1 Last

*Role Name	Description
<input type="text"/>	<input type="text"/>

Add Team Role

Marketing Center Information

Customize Find View All First 1 of 1 Last

*Marketing Center	Description	Institution	Center Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Marketing Center

Marketing Programs - Team page

Owner This check box is automatically selected for the owner of the campaign.

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

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

Add a Team Member Click to enter additional team members.

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

Add Team Role Click to enter additional team roles.

Marketing Center You can select a Marketing Center from the available list if any have been defined for the campaign.

Add Marketing Center

Click this button to add a Marketing Center to the campaign.

Delivered Team Roles

The following campaign team roles are delivered:

<i>Role</i>	<i>Description</i>
Marketing Manager	<ul style="list-style-type: none"> • Manages the design and execution of campaigns. • Determines campaign resources needs. • Manages contact strategies. • Approves campaigns. • Selects campaign channels. • Approves promotional offers. • Oversees campaign budgets. • Manages relationships with the managers of campaign channels (newspaper publishers, web masters, and so on). • Evaluates and fine-tunes campaigns in progress.
Campaign Manager	<ul style="list-style-type: none"> • Supervises campaign teams. • Creates promotional offers. • Manages detailed planning and execution of one or several campaigns. • Assigns specific tasks to campaign team members. • Coordinates activities with other campaign managers. • Evaluates campaigns in progress and suggests changes to the marketing manager. • Establishes campaign budgets.

Role	Description
Marketing Analyst	<ul style="list-style-type: none"> • Defines, analyzes, and manages target audience lists. • Maintains understanding of applications, including PeopleSoft Marketing. • Helps create campaign hierarchies. • Manages campaign elements, including audiences, offers, and collateral. • Generates and analyzes campaign performance reports.
Marketing Researcher	<ul style="list-style-type: none"> • Performs exploratory analysis of marketing campaigns and target audience lists. • Analyzes customer affinities and behaviors. • Builds and manages predictive models for targeting audiences. • Runs marketing optimization programs. • Acts as liaison to the IT department.
Marketing Creative	<ul style="list-style-type: none"> • Creates campaign collateral. • Manages relationships with ad agencies or an internal ad group. • Manages the relationship with the fulfillment shop.
Marketing App Administrator (marketing application administrator)	<ul style="list-style-type: none"> • Creates user profiles. • Sets up user security and roles. • Defines marketing channels. • Defines campaign objectives.

Marketing Programs and Marketing Security

The Marketing Centers grid appears on the Team tab of the Marketing Programs component.

In order to secure a marketing program, you must select the Secure check box, which appears on the Program tab of the Marketing Programs component.

When searching for Marketing Programs that might be secured, the search displays only those Marketing Programs that the user performing the search is authorized to access. Because the Marketing search can also include the program type of Dialog, the search also checks secured dialogs for Marketing Center authorization.

If a secured child campaign is associated to a roll up, all campaigns are automatically copied over from the roll up to the secured child campaign. If a campaign is unsecured and a roll up is selected, Marketing Centers from the roll up are not copied to the campaign.

When a Marketing Center is added or deleted on a roll up, then the changes are propagated to all the secured child campaigns associated to the roll up. However, when adding or deleting Marketing Centers on a secured child campaign, changes are not propagated from the child to the parent roll up. This is because multiple child campaigns can be associated with a roll up, and users might want to assign different Marketing Centers for each campaign. Specific requirements are as follows:

- If a campaign is secured and you select a roll up, the system displays a warning message informing you that Marketing Centers from the selected roll up will be copied over when the campaign is saved, and reminding you to review Marketing Centers that might have been copied from a prior roll up if the campaign was previously associated to another roll up.
- When a save occurs, all Marketing Centers from the roll up that do not already exist on the secured child campaign will be copied over.
- When adding new Marketing Centers to a roll up, upon a save the new Marketing Centers are added to all secured child campaigns that do not already exist on the child campaigns.
- When deleting Marketing Centers from a roll up, upon a save the deleted Marketing Centers will be removed from all secured child campaigns.
- If a secured child campaign that has been previously linked to a roll up is modified by associating it to another roll up, then upon a save all Marketing Centers from the newly linked roll up are copied over to the child campaign if they do not already exist. The user decides whether to manually delete any Marketing Centers that might have been copied over from a prior roll up.

Defining a Trigger

Access the Marketing Programs - Trigger page.

The screenshot displays the 'Marketing Programs - Trigger' configuration page. At the top, there are navigation tabs: Program, Activities (1), Team, Triggers, Tasks (1), Cost Summary, Audience, and Performance. A 'Go To' dropdown is set to 'Select One...'. The 'Trigger Summary' section shows a table with columns: Trigger Name, Trigger Type, Trigger Condition, Start Date, End Date, and Frequency. One row is visible with 'Trigger Name 1' and 'Date and Time'. Below the table, a 'Trigger Type' dropdown is set to 'Date and Time' with an 'Add' button. The 'Trigger Detail' section contains:

- *Trigger Name: Trigger Name 1
- Trigger Type: Date and Time
- Select Condition**: Select information that will prompt the Trigger Actions. Fields for Date and Time.
- Select Trigger Action(s)**: Enter the action(s) to occur when the Trigger Conditions are met.
 - Execute: Campaign Lead Generation, Activity [searchable field]
 - Stop: Campaign Lead Generation, Activity [searchable field]
 - Send Notification: Recipient [searchable field]
 - Generate Audience: * Audience [searchable field]
- Schedule Check Conditions**: Specify the from and to dates, and frequency, the system will check for Trigger Conditions.
 - From [calendar icon] To [calendar icon] Frequency [dropdown]
 - Recurring Last Executed [field] Count 0

 An 'Apply Trigger' button is located at the bottom left of the detail section.

Marketing Programs - Trigger page

Trigger Name Enter a descriptive name for the trigger.

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

Select Condition Group Box

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

Trigger Type	Select Condition
<i>Date and Time</i>	<ul style="list-style-type: none"> • Date • Time
<i>Metric to Metric</i>	<ul style="list-style-type: none"> • Metric One • Campaign One • Activity One • Operator • Metric Two • Campaign Two • Activity Two
<i>Metric to Value</i>	<ul style="list-style-type: none"> • Metric • Campaign • Activity • Operator • Value

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

- Date** Select the date when the system is to run the trigger.

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

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

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

- Metric, Metric One, Metric Two** Select a performance metric to apply against a corresponding campaign or activity. Metric One and Metric Two labels indicate that the metric is applied against the campaign or activity with the same designation.
- Campaign One, Campaign Two** Select a campaign against which you want to apply the metric. Selection of a campaign is required. Condition metrics may be applied against any running campaign.

Campaign	This field displays the name of the current campaign.
Activity, Activity One, Activity Two	Select an optional activity within the specified campaign. When an activity is specified, the metric applies only against that activity and no others within the campaign.
Operator	<p>Select the operator by which to compare two metric results, or a metric against a fixed value. Operator values are:</p> <ul style="list-style-type: none"> • <i>Equal to</i> • <i>Greater than</i> • <i>Greater than or Equal to</i> • <i>Less than</i> • <i>Less than or Equal to</i> • <i>Not Equal to</i> <hr/> <p>Note. The following four operators are reserved for future use: <i>Divide</i>, <i>Minus</i>, <i>Multiply</i>, and <i>Plus</i>.</p> <hr/>
Value	<p>Enter a fixed value against which the metric result is compared.</p> <hr/> <p>Note. The system displays this field only when you select the trigger type <i>Metric to Value</i>.</p> <hr/>

Select Trigger Actions Group Box

Execute	Select to run an activity within the current campaign when the trigger condition is true. Execute actions apply only to the campaign activity and not to the campaign itself.
Stop	Select to stop a campaign, or an activity within the campaign, when the trigger condition is true. If no activity is selected, the stop action applies to the campaign.
Send Notification	Select to notify a person when the trigger condition is true. Select the person to notify in the Send Notification field.
Generate Audience	Select to generate an audience when the trigger condition is true. Select the audience to generate in the Generate Audience field. Schedule the Audience Generation Application Engine program to be run by the processor to generate the audience.

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

Schedule Check Conditions

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

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

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

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

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

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

See Also

[Chapter 4, "Setting Up PeopleSoft Marketing and TeleSales," Defining Trigger Schedules, page 33](#)

Defining Campaign Tasks

Access the Marketing Programs - Tasks page (Marketing, Marketing Programs, Plan Campaign Program, Tasks).

Marketing Programs

Save Refresh | Notification | Clone | Calendar | Reporting | >> Personalize

Program Lead Generation **Status** Approved
Start Date 01/09/2001 **Program Type** Campaign
End Date 12/31/2010 **ID** TL101

Program Activities (1) Team Triggers **Tasks (1)** Cost Summary Audience Performance

Go To Select One...

Program Tasks Customize Find First 1 of 1 Last

Name	Status	Assigned To	Start Date	Due Date	Priority	% Complete
Create the Email	New Task	Brian Gibbs	09/24/2002		Low	

Task Select a name Add Task

Task Sets Select a set Add Task Set

Marketing Programs - Tasks page

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

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

You use task sets to group individual tasks and add them as a group. For example, when you create a campaign, three tasks always need to be added: Create Collateral, Create Metrics, and Create Offer. Rather than selecting each task individually, you can create a task set (perhaps called Always Add 3) and include the three tasks within the task set. Next time you create a campaign, you can select the Always Add 3 task set, eliminating the need to add the tasks one at a time.

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

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

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

See Also

[Chapter 4, "Setting Up PeopleSoft Marketing and TeleSales," Defining Task Tools, page 58](#)

Creating and Updating Campaign Tasks

Access the Marketing Program - Task Detail page (select a task from the available list and then click the Add Task button on the Marketing Program - Tasks page).

Task Detail page

- | | |
|--------------------|--|
| Name | Enter a name for the task, or leave the shell default name. |
| Assigned By | The system automatically assigns the current user to this position. You can change this to any worker. |
| Assigned to | Select a user to run the task. The user must be a member of the campaign team. Save the campaign to activate the task assignment. |
| | <hr/> Note. The system does not permit you to assign a task to a person who is not a member of the campaign team. <hr/> |
| Start Date | Enter a date on which the task is to begin. On this date, a notification is added to the worklist of the team members assigned to the task. |
| Due Date | Enter a date on which the task is to be complete. This due date is compared against the % Complete field. If the task is not 100 percent complete by the due date, a workflow process sends notifications (when defined). |
| Priority | Select the urgency of the task. This information is for the benefit of the user, only. No logic is attached to priority values. The values are: <ul style="list-style-type: none"> • <i>High</i> • <i>Medium</i> • <i>Low</i> |
| Status | Select the position of the task in its life cycle. When the status is changed to <i>Completed</i> , the due date is changed to the current date and the % Complete value is changed to <i>100</i> . |

% Complete (percent complete)

Enter the percentage portion of the task that is complete. When this value is changed to *100*, the due date is changed to the current date and the status is changed to *Completed*.

Description

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

Viewing the Cost Summary

Access the Marketing Programs - Cost Summary page (Marketing, Marketing Programs, Plan Campaign Program, Cost Summary).

You use the Marketing Programs - Costs Summary to view summary information about all costs associated with a campaign. Costs are summarized by the activity and campaign, and by cost types. For roll up campaigns, all child costs (for associated campaigns, activities, and dialogs) are also displayed.

Marketing Programs

Save Refresh | Notification | Clone | Calendar | Reporting | >> Personalize

Program Lead Generation	Status Approved
Start Date 01/09/2001	Program Type Campaign
End Date 12/31/2010	ID TL101

Program Activities (1) Team Triggers Tasks (1) Cost Summary Audience Performance ▶

Go To Select One... ▼

Program Costs Customize | Find | View All | 📄 | First ◀ 1-3 of 3 ▶ Last

Program Cost	Activity Name	Budget	Planned	Expenses	Difference
	Lead Generation	1,060,000.00	5,000.00	8,734.23	-3,734.23
Totals			5,000.00	8,734.23	-3,734.23

Cost Types by Component Customize | Find | View All | 📄 | First ◀ 1-3 of 3 ▶ Last

Description	Component	Planned	Expenses	Difference
Market Research	Administrative	5,000.00	8,734.23	-3,734.23
Totals		5,000.00	8,734.23	-3,734.23

Save Refresh | Notification | Clone | Calendar | Reporting | >> Top of Page

* Required Field

Marketing Programs - Cost Summary page

Working with Campaign Audiences

Access the Marketing Programs - Audience page (Marketing, Marketing Programs, Plan Campaign Program, Audience).

Marketing Programs - Audience page

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

Activity Audiences

The Activity Audiences group box displays information about all audiences associated with the campaign. Information displayed about each audience includes the name of the audience, audience status, the activity to which the audience is attached, the date on which the audience was last updated, and the priority value of the audience.

Count The total count of records in the audience.

Dup. Count (duplicate count) A count of the number of records that are duplicated in other audiences associated with the campaign.

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

Dedup Activity Audiences

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

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

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

Get Duplicate Counts

Click to run a process to determine how many duplicated records exist in each audience. The process is scheduled to run immediately. How long it takes to complete the process depends on the size of the list and other processor activity.

Dedup Audiences (deduplicate audiences)

Click to run a process to eliminate duplicated records. Records in the audience with the highest priority value remain as the original record. Duplicated records in all audiences with a lower priority value are eliminated. The process is scheduled to run immediately. How long it takes to complete the process depends on the size of the list and other processor activity.

Priority

Enter a priority value to determine which records the system removes. The system removes lower-priority duplicates before higher-priority duplicates. Indicate the relative priority of the audiences by giving numerically higher numbers to lower-priority audiences. For example, an audience with a priority number of 99 is of lower priority than an audience with a priority number of 30. To prevent an audience from being modified, enter a priority value of zero (0).

Note. This field can be edited only if the audience is approved or if it is a fixed audience.

Add a Control Group Audience

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

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

Audience Name	Enter a descriptive name for the control group audience.
Selection Type	<p>Select the manner in which the system selects specific records and people to place in control groups.</p> <p>Select <i>Every Nth</i> to select records by an even distribution method. For example, for a control group consisting of five percent of the total audience, every 20th record is selected.</p> <p>Select <i>Random</i> to select records on a random basis.</p> <hr/> <p>Note. The method used to randomly select records is not meant to produce a statistically valid random sample.</p> <hr/>
Minimum Amount	Enter the smallest control group size that you consider acceptable. If the actual amount yielded by the selection process is less than the minimum, the process fails. The newly created control group audience is set to a status of <i>Designed</i> rather than <i>Generated</i> and a note is entered in the log indicating the reason.
Maximum Amount Type	<p>Select the manner in which the maximum size of the control group is determined.</p> <p>Select <i>Fixed Amount</i> to specify an actual maximum number. Enter the maximum number.</p> <p>Select <i>Percentage of Lists</i> to determine the control group count as a percentage of the combined audience total. Enter the percentage of the total number of control group members to draw from each of the audiences. The total percentage must equal 100. To prevent control group members from being selected from a particular audience, enter zero as a source percentage for that audience.</p> <hr/> <p>Note. You can draw control group members only from fixed audiences that have the status <i>Approved</i>.</p> <hr/>
Create This Control Group	Click to generate a control group. The control group creation process is scheduled and run immediately.
Cancel	Click to cancel the control group definition before creating it. After you click the <i>Create This Control Group</i> button, the process cannot be canceled.

Measuring Campaign Effectiveness

Access the Marketing Programs - Performance page (Marketing, Marketing Programs, Plan Campaign Program, Performance).

Marketing Programs

Save Refresh | [Notification](#) | [Clone](#) | [Calendar](#) | [Reporting](#) | >> [Personalize](#)

Program Lead Generation	Status Approved
Start Date 01/09/2001	Program Type Campaign
End Date 12/31/2010	ID TL101

Program Activities (1) Team Triggers Tasks (1) Cost Summary Audience Performance ▶

Go To Select One... ▼

Review Performance Metrics Customize | Find | | First 1-3 of 3 Last

*Metric	UOM	Forecast Value	Actual Value	Difference	View
Number of Targeted	Count				Edit
Number of Leads ▼	Count	1,000.00			View
Cost per Lead ▼	Amount	90.00			View

Add Performance Metric

Save Refresh | [Notification](#) | [Clone](#) | [Calendar](#) | [Reporting](#) | >> [Top of Page](#)

* Required Field

Marketing Programs - Performance page

Review Campaign Performance Metrics

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

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

Metric Select to measure campaign performance.

UOM (unit of measure) Displays the unit of measure associated with the selected metric.

Forecast Value Enter the result that you expect.

Actual Value Displays the actual result. This field is populated with data from various tables and sometimes from multiple applications (such as PeopleSoft Sales and PeopleSoft TeleSales).

Difference Displays the difference between the forecast and actual values.

Edit or View

Click the Edit button to edit an existing metric. Click the View button to return the display to the view mode.

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

Delete

Click to delete an existing metric.

Add a New Performance Metric

Click to add a new metric to the existing list.

Using Campaign Notes

Access the Marketing Programs - Notes page (Marketing, Marketing Programs, Plan Campaign Program, Notes).

Use this page to view existing notes and attachments, to send email messages, or to add new notes.

You can add a note to a campaign, activity, task, content item, content task, or offer.

See *and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Viewing Campaign History

Access the Marketing Programs - History page (Marketing, Marketing Programs, Plan Campaign Program, History).

Use this page to view audit and interaction information about the campaign.

Viewing Audit Information

To view information about changes to the campaign, click the Audit link.

Marketing Programs

Save Refresh << Search Next Add Program Personalize

Program Spring Recruiting - Mail Brochures
Start Date 02/10/2016
End Date 02/20/2016

Status New
Program Type Campaign
ID CMP0300033

Team Triggers Tasks (0) Cost Summary Audience Performance Notes (0) History

Audits | Interactions

Audit History Customize Find View All First 1-2 of 2 Last

Record Name	Field Name	Action Taken	Date and Time Stamp	Changed By	Value Before Change	Value After Change
RA_CMPGN_WAVE		Add	08/05/2009 4:25:37AM PDT			
RA_CAMPAIGN	Rollup Campaign	Change Old (PPR Only)				CMP0300035

Refresh

Marketing Programs - History page

Viewing Interaction Information

To view the email notification interaction records for the marketing campaign, click the Interactions link.

You can click the record's icon to transfer to the appropriate 360-degree view for the interaction.

Viewing the Marketing Calendar

Access the Marketing Calendar page (click the Marketing Calendar button on the Plan Campaign Program page)..

Marketing Calendar				
Search Criteria				
Display Selections				
*Year <input type="text" value="2009"/>		*Quarter <input type="text" value="July - September"/>		
Programs for 2009 3		Previous Quarter	Current Quarter	Next Quarter
Program Name	Type	July	August	September
Generate Consumer Wireless Sales - Joint Program	Campaign			
Joint Marketing Magazine Ad - Q2				
Joint Marketing Direct Mailer				
Joint Marketing Magazine Ad - Q3				
Joint Marketing Magazine Ad - Q4				
Partner Recruitment and Maintenance	Roll up			
Partner Communications	Campaign			
Partner Newsletter				
Partner Consumer Sales - CA	Campaign			
Partner Consumer Sales - CA Activity 2				
Partner Consumer Sales - CA Activity 1				
Partner Consumer Sales - CA Activity 3				
Partner Consumer Sales - CA Activity 4				
Digital Wireless Package	Dialog			
Dialog Begins				
Broadcast Email - Wireless Offer				
Lead Generation	Campaign			
Internal Email Blast - Kick Off!				
Midwest Customer Wireless Drive	Campaign			
Celebrity Pitch - Radio Ad				

Marketing Calendar page

The Marketing Calendar page displays the status and schedule relationship of all campaigns and activities that meet the search criteria that you define (business unit, year, and quarter are required). Schedules are displayed graphically, showing the start and end dates of the campaign at each level of the hierarchy: roll up, campaign or dialog, and activity. Campaigns within a roll up campaign are displayed relative to the parent campaign, and activities within each child campaign are displayed relative to the child campaign.

Creating Sales Leads and TeleSales Prospects

PeopleSoft Marketing enables you to create leads for PeopleSoft Sales or PeopleSoft TeleSales. You can create leads either automatically or manually. The automatic process is delivered enabled with the system and generates leads whenever certain conditions exist. The manual process is available at any point.

This section discusses how to:

- Generate sales or telesales leads automatically.
- Generate sales or telesales leads manually.
- View a generated audience.
- Confirm results of the creation process.

Pages Used to Create Sales Leads and TeleSales Leads

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Create Leads	RA_CREATE_LEADS	Marketing, Execution, Manual Leads Creation	Turn campaign audiences into sales or telesales leads.
View Audience	RA_VIEW_WAVE_LIST	Click the View Audience button on the Create Leads page.	View the created audience.
Leads Creation Status	RA_CREATE_LEAD_STA	<ul style="list-style-type: none"> • Click the View Results button on the Create Leads page. • Marketing, Execution, Lead Creation Status 	Confirm results of the creation process.

Generating Sales or TeleSales Leads Automatically

PeopleSoft Marketing is delivered with an Active Analytics Framework term that automatically generates leads from a campaign activity audience for PeopleSoft Sales and PeopleSoft TeleSales. The term (Marketing Auto List Load) is delivered enabled and can be disabled if you choose. To disable the term:

1. Select Enterprise Components, Active Analytics Framework, Policies, Manage Policies.
2. On the search page, select Marketing Campaign for the context name and click Search.
3. Click Marketing Auto List Load for the desired setID.

Note. In some cases, the term is named CSS: Marketing Auto List Load.

4. Click the Modify System Data button.

Note. If the term has already been modified from its delivered version, this button does not appear.

5. Click the Redesign button.
6. Click Edit Actions.
7. Change the status of one or both actions (Process and Auto Generation Started) to Inactive.
8. Click Done and then click Save.

Leads are automatically generated when the channel execution value on the marketing channel definition is set to either sales or telesales, and the status of a campaign activity moves from approved (APPR) to executing (EXEC). Leads are produced for PeopleSoft Sales when the channel execution value is set to Sales, and for PeopleSoft TeleSales when the value is TeleSales. No messages appear regarding the lead generation.

See Also

Chapter 9, "Creating Campaigns and Activities," Defining Activities, page 159

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Generating Sales or TeleSales Leads Manually

Access the Create Leads page (Marketing, Execution, Manual Leads Creation).

Create Leads

Run Control ID HIT2002-10-10-15.55.29.000000 [Report Manager](#) [Process Monitor](#)

This schedules a batch process that will create a Sales/TeleSales Lead for each member of the Audience that is associated with the selected Campaign Activity, each member of an Audience related to an Event, or each member of an Audience itself.

Create Leads For

Lead Load Type Campaign
 Event
 Audience

*Business Unit High Tech

Campaign VPN Sales to Install Base

Activity West Region Sales Leads for VPN

Event

Audience

Status

Process Status Successfully Completed

Create Leads page

Create Leads For

Business Unit Select the business unit within which the campaign resides.

Campaign Select the campaign within which the activity resides.

Activity	Select the activity. <hr/> Note. The system exports only those audiences that have the status <i>Committed</i> . <hr/>
View Audience	Click to access the View Activity Audience page, where you can verify the audience. <hr/> Note. Although all audience entries appear, entries that have been deleted or are part of a control group are not used to create sales leads or prospects. <hr/>
Run	Click to run this request. PeopleSoft Process Scheduler runs the Create Sales Leads/Prospects process at user-defined intervals.
Status	
Process Status	Displays the status of the process. Values are <i>Not Yet Processed</i> , <i>Successfully Completed</i> , or <i>Completed With Errors</i> .
View Results	Click to access the Leads Creation Status page, where you can view the process results. <hr/> Note. This button is enabled when the process finishes. <hr/>

Viewing a Generated Audience

Access the View Audience page (click the View Audience button on the Create Leads page).

This page enables you to see the actual results of a generated audience.

View Audience

Business Unit HT001 High Tech
Campaign HCP00102 VPN Sales to Install Base
Activity HCW00114 West Region Sales Leads for VPN
Audience ID HCL00103 PacNW Segment

[Return to Create Sales Leads](#)

Audience Records			
Business Object ID	Role Type	Name	Deleted
321	Contact	Albright,Fred	<input type="checkbox"/>
434	Contact	Grady,Sheila	<input type="checkbox"/>
435	Contact	Johnson,Bill	<input type="checkbox"/>
459	Contact	Wright,Daniel	<input type="checkbox"/>
463	Contact	Garrett,Tristan	<input type="checkbox"/>

View Audience page

Confirming Results of the Creation Process

Access the Leads Creation Status page (Marketing, Execution, Lead Creation Status).

Leads Creation Status

Process Instance 13743 **User ID** DCG
Run Status Success **Run Control ID** DCG2009-09-0914.09.37.218000
Rows Processed 9 **Rows in Error** 0

Details			
BO ID	Business Unit	Campaign ID	Activity
14030	US200	CMP0300019	WVE0300013

Lead ID 1000300397 **Note** Lead was successfully created.

Leads Creation Status page

This page displays detailed information about the results of the Create Leads process.

Note Displays notes related to the process. If errors occur during the process, a message might appear for each error.

Chapter 10

Using PeopleSoft TeleSales

This chapter provides an overview of PeopleSoft TeleSales and discusses how to:

- Manage telesales.
- Process prospects and responses.

Understanding PeopleSoft TeleSales

Compared to broadcast, print, or direct mail campaign channels, telesales offers the advantage of trained agents talking person-to-person with prospects. Agents can present more information through telesales than through other media, as well as answer prospect questions. Additionally, the telesales agent can ask for and complete a sale.

PeopleSoft TeleSales provides powerful tools for both telesales managers and agents, plus seamless integration to PeopleSoft Sales and PeopleSoft Order Capture.

PeopleSoft TeleSales enables telesales managers to view details about telesales campaign activities and telesales agents or teams. Managers can assign individual agents or complete teams to activities. By setting up automatic callback rules, managers can define how many times each prospect is available to callers and how frequently the prospect name appears in the caller queue.

PeopleSoft TeleSales enables telesales agents to access call prospects, activate scripts, and record call results within one component. Activity, offer, and product information is available on convenient tabs, and 360-Degree View functionality provides agents with access to all stored information about the customer.

In addition to facilitating the telesales contact, PeopleSoft TeleSales provides three options for closing the sale. For product offers that can be closed with one phone call, you can transfer prospects who want to place an order to an order capture agent, or the telesales agent can capture the order personally. For more complicated products that rely on the telesales call to qualify with a follow-up sales call, PeopleSoft TeleSales can be configured to automatically transfer qualified prospects to the PeopleSoft Sales application. Each of these options depend on the integration method selected as part of the activity definition.

Warning! To ensure that all telesales prospects have a telephone number, include it as part of the audience selection criteria.

Managing TeleSales

This section discusses how to:

- View executing telesales campaign activities.
- Assign an agent to a campaign activity.
- Assign a team to a campaign activity.
- Edit the campaign audience.
- View all teams under a setID.
- Assign a campaign activity to a telesales team.
- Define rules for automatic callback.

Pages Used to Manage TeleSales

Page Name	Definition Name	Navigation	Usage
Assign By Campaign	RT_MGR_CMPGN_SMRY	TeleSales, Manage TeleSales Agents, Assign by Campaign	View executing telesales campaign activities under a business unit.
Assign by Campaign - Assign Agents to Campaign	RT_MGR_CMP_AGT_SEL	TeleSales, Manage TeleSales Agents, Assign by Campaign Click the Assign Agent button on the Assign by Campaign page.	Link individual agents to a campaign activity and establish schedules.
Assign by Campaign - Assign Resources to Campaign	RT_MGR_CMPGN_DTL	TeleSales, Manage TeleSales Agents, Assign by Campaign Click the Assign Team button on the Assign By Campaign page.	Link a team to a campaign activity.
Manage TeleSales - Edit Campaign Audience	RT_MGR_CMPGN_LIST	TeleSales, Manage TeleSales Agents, Assign by Campaign Click the Assign Team button on the Assign By Campaign page. Click the Edit Campaign Audience button on the Assign Resources to Campaign page.	Remove prospects from a campaign audience. Also allows the TeleSales Manager to see the status of all non-closed prospects on a specific activity, as well as seeing to whom a prospect is currently assigned
Assign By Team	RT_MGR_TEAM_SMRY	TeleSales, Manage TeleSales Agents, Assign by Team/Agent	View all teams assigned to campaigns under a setID.

Page Name	Definition Name	Navigation	Usage
Assign by Team - Assign Campaigns To Team	RT_MGR_TEAM_DTL	TeleSales, Manage TeleSales Agents, Assign by Team/Agent Click a team name link on the Assign by Team page.	Link a campaign activity to a telesales team.
Call Back Times	RT_OM_CALLBACKS	TeleSales, Manage TeleSales Agents, Call Back Times	Define rules for automatic callback for telesales campaigns and activities.
Set Acceptable Times	RT_ACCEPTTIMES	TeleSales, Manage TeleSales Agents, Set Acceptable Times	Define rules for acceptable calling times.

Viewing Executing TeleSales Campaign Activities

Access the Assign By Campaign page (TeleSales, Manage TeleSales Agents, Assign by Campaign).

Assign by Campaign									
Business Unit = COM01									
Assignments									
Campaign Name	Campaign Activity			Priority	Start Date	End Date	Assigned To	Calls Remaining	Completed Calls
Wireless Push - Consumer	Wireless Discount - Telesales			Medium	08/13/2002	12/31/2008	Teams	8	0
North America DSL Sales Push	DSL Telesales to Customer Base			Medium	11/11/2002	12/31/2008	Teams	21	0

Assign by Campaign page

The page displays all executing campaign activities successfully pushed from PeopleSoft Marketing. Click a campaign activity name to access the Marketing Programs - Activity page. You can search by Business Unit, Campaign Name, Activity Name, priority, start date, and end date in any combination. Business Unit is a required field when searching.

Note. In order for the telesales manager role to determine the best person to assign the campaign, that role has been granted read-only capabilities to learn more about the campaign. If the telesales manager will be making updates, he or she must be added as a team member or owner.



Click the Assign Agent button to access the Assign Agents to Campaign page and assign individual agents to campaigns.



Click the Assign Team button to access the Assign Resources to Campaign page and assign telesales teams to campaigns.

Note. Agents who are assigned to a campaign activity as part of a team are simultaneously assigned as an individual agent if viewed via the Assign Agent button. This functionality is also useful for assigning a full team plus additional agents, or for assigning a full team and then removing a few people.

Assigning an Agent to a Campaign Activity

Access the Assign by Campaign - Assign Agents to Campaign page (TeleSales, Manage TeleSales Agents, Assign by Campaign, click the Assign Agent icon).

Assign Agents to Campaign

Campaign Activity DSL Telesales to Customer Base 

Audience Telco Customers 

Start Date 11/11/2002 **End Date** 12/31/2008

Priority Medium

View Campaign Call Results

Not Attempted 21 **No Contact** 0

Call Back 0 **Closed** 0

Total Count 21

Assignments				
Select	Agents	Current Assignments	Calls Remaining	Completed Calls
<input type="checkbox"/>	Barney,Smythe	None	0	0
<input type="checkbox"/>	Bell,Kathy	None	0	0
<input type="checkbox"/>	Biaggi,Aldo	None	0	0
<input type="checkbox"/>	Chan,Eddie	None	0	0
<input type="checkbox"/>	Cooper,Scott	None	0	0
<input type="checkbox"/>	Gardner,Gayle M	None	0	0
<input type="checkbox"/>	Kelly,Susan M.	,	0	0
<input checked="" type="checkbox"/>	Nelson,Nancy	Wireless Discount - Telesales, DSL Telesales to Customer Base	29	0
<input type="checkbox"/>	Ogden,Nancy	None	0	0
<input type="checkbox"/>	Smith,Frederick	None	0	0
<input type="checkbox"/>	Underwood,Spencer	None	0	0

[Select All](#) [Clear All](#)

[Return to Assign by Campaign](#)

Assign by Campaign - Assign Agents to Campaign page

View summary information about available agents and select agents for assignment to the campaign.



Click the Campaign Activity icon to access the Marketing Programs - Activities page to view details about the campaign activity.



Click the Edit Campaign Audience icon to access the Edit Campaign Audience page, filter the list display, and remove prospects from the target audience.

View Campaign Call Results

This group box displays the current status of telesales calls for the selected campaign activity.

Assign Resources

This scroll area displays all telesales agents with their current assignments and the status of their calls.

Select Select the check box beside an agent name to assign the agent to the new campaign activity. Assigning an agent makes call prospects available to the agent.

Select All Click to assign all agents to the campaign activity.

Clear All Click to remove all agents from the campaign activity.

Schedule Assignments Click to change the display of the Assign Resources scroll area. The new display enables you to establish specific work schedules for individual agents. Only those agents assigned to the specific activity are displayed and eligible for scheduling.

By establishing a work schedule for agents, you control the date and time when an agent can work a specific activity. Agents with assigned schedules only have access to prospects during their assigned dates and times. All assigned dates and times are validated by the system to fit within the overall parameters of the campaign activity.

When you establish a schedule for an agent originally assigned to the campaign as part of a team, the system changes the assignment status to *Assigned by Agent*. Assignment schedules are not effective until you click the Schedule Assignments button again or click the Save button.

View All Agents Click to return the page display to the default view, which lists all agents.

Assigning a Team to a Campaign Activity

Access the Assign by Campaign - Assign Resources to Campaign page (TeleSales, Manage TeleSales Agents, Assign by Campaign, click the Assign Team icon).

Assign Resources to Campaign

Campaign Activity DSL Telesales to Customer Base

Audience Telco Customers

Start Date 11/11/2002 **End Date** 12/31/2008

Priority Medium

View Campaign Call Results

Not Attempted 21 **No Contact** 0

Call Back 0 **Closed** 0

Total Count 21

Assignments				
Select	Team Name	Current Assignments	Calls Remaining	Completed Calls
<input type="checkbox"/>	Complaint Services	None	0	0
<input type="checkbox"/>	Contact Us	None	0	0
<input type="checkbox"/>	Fraud Team	None	0	0
<input type="checkbox"/>	General Customer Support	None	0	0
<input type="checkbox"/>	Midwest FS Team	None	0	0
<input type="checkbox"/>	Network Operations	None	0	0
<input checked="" type="checkbox"/>	Telemarketing - Midwest All Services	Wireless Discount - Telesales, DSL Telesales to Customer Base	29	0

[Select All](#) [Clear All](#)

[Return to Assign by Campaign](#)

Assign by Campaign - Assign Resources to Campaign page

View summary information about telesales teams and select teams for assignment to the campaign.



Click the Campaign Activity button to access the Marketing Programs - Activities page.



Click the Edit Campaign Audience button to access the Edit Campaign Audience page, filter the audience display and remove prospects.

View Campaign Call Results

This group box displays the current status of telesales calls for the selected campaign activity.

The *Not Attempted* value is calculated by taking the number of calls in the list and subtracting both the completed calls and callbacks that were attempted with no response. Multiple callbacks with no response to the same person are counted as only one call for the purposes of this calculation.

The *Call Back* value is the number of calls that ended in a result of Call Back or No Contact (it is not the number of prospects currently awaiting a callback).

Assign Resources

This scroll area displays all marketing teams with their current assignments and the status of their calls.

Select Select the check box beside a team name to assign the team to the campaign activity. Assigning a team makes call prospects available to team members.

Select All Click to assign all teams to the campaign activity.

Clear All Click to clear all selections.

Editing the Campaign Audience

Access the Manage TeleSales - Edit Campaign Audience page (click the Assign Agent or Assign Team icon on the Assign by Campaign page, then click the Campaign Audience Details icon on the Assign By Campaign page).

Edit Campaign Audience

Campaign Activity Telemarketing - Quality Retail Outlets **Start Date** 10/01/2002

Priority Medium **End Date** 10/01/2010

Select	Name	Status	Team	Assigned To
<input type="checkbox"/>	Blaine, Richard C.	New	None	None
<input type="checkbox"/>	Cox, Terry	New	None	None
<input type="checkbox"/>	Dobbs, Fred C.	New	None	None
<input type="checkbox"/>	Kingston, Halle	New	None	None
<input type="checkbox"/>	Levy, Rick	New	None	None
<input type="checkbox"/>	McGuire, Maureen J.	New	None	None
<input type="checkbox"/>	Williams, Victoria	New	None	None

[Select All](#) [Clear All](#)

[Remove from Audience](#)

[Return to Assign Resources to Campaign](#)

Filter

Enter or select the criteria you want to appear in the list and click Filter.

Name

Status

Team

Manage TeleSales - Edit Campaign Audience page

Remove prospects from the calling list.

Prospects

Select Select the check box beside a prospect name to identify the record for removal from the list.

Select All Click to select all prospects for removal from the calling list.

Clear All Click to clear all selected records.

Remove from Audience Click to remove all selected records from the audience.

Filter

Use the Filter region to limit the display of prospects. Enter a filter value in one or more of the available fields and click the Filter button.

Viewing All Teams Under a SetID

Access the Assign By Team/Agent page (TeleSales, Manage TeleSales Agents, Assign by Team/Agent).

Assign by Team/Agent				
SetID = Communications				
Assignments				
Team Name	Status	Assigned Campaigns	Calls Remaining	Completed Calls
Midwest FS Team	Active	None	0	0
Complaint Services	Active	None	0	0
Contact Us	Active	None	0	0
Fraud Team	Active	None	0	0
General Customer Support	Active	None	0	0
Network Operations	Active	None	0	0
Telemarketing - Midwest All Services	Active	DSL Telesales to Customer Base	21	0

Assign by Team/Agent page

View summary information about all available telesales teams. You can search by SetID, Team Name, or Status in any combination. SetID is a required field when searching.

Team Name Click to access the Assign Campaign to Team page and link a campaign activity to the team.

Linking a Campaign Activity to a TeleSales Team

Access the Assign Campaigns To Team page (click a team name link on the Assign by Team page).

The Assign Campaigns region displays all current campaign activities, the priority, teams currently assigned to the activity, and calls remaining.

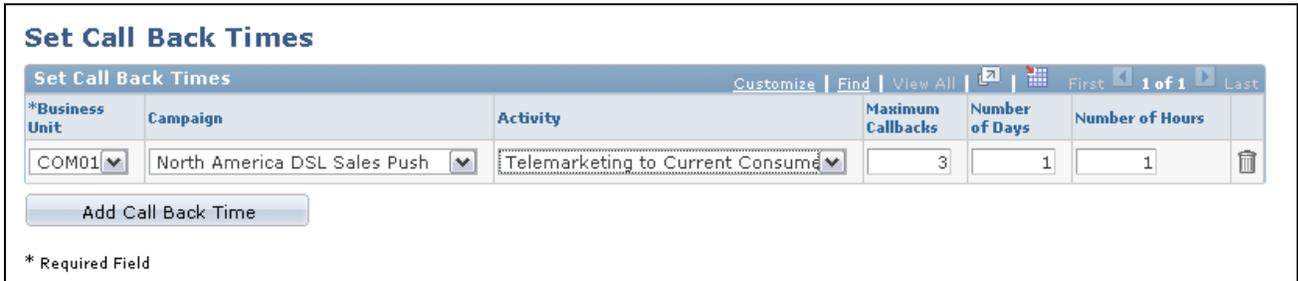
Select Select the check box beside a campaign activity to assign a campaign team.

Select All Click to assign the team to all campaign activities.

Clear All Click to remove the team from all campaign activities.

Defining Rules for Automatic Callback

Access the Set Call Back Times page (TeleSales, Manage TeleSales Agents, Set Call Back Times).



*Business Unit	Campaign	Activity	Maximum Callbacks	Number of Days	Number of Hours
COM01	North America DSL Sales Push	Telemarketing to Current Consume	3	1	1

* Required Field

Set Call Back Times page

Automatic callback rules define when and how often prospects return to the caller queue. Tailor callback rules by any combination of business unit, campaign, or activity—you can define them per business unit, or narrow them down to specific business units, campaigns, and activities.

Business Unit Select the campaign's business unit.

Campaign Select the campaign for which you want to define callback times.

Activity Select the activity for which you want to define callback times. You can define different callback rules for each activity within a campaign.

Number Callbacks Allowed Specify the number of callbacks allowed for this campaign and activity. Enter zero to allow no callbacks. Enter 99 to allow unlimited callbacks.

Add Number of Days Specify the number of days until the prospect is available for a callback. Leave the field blank if the callback is to be within the same day.

Add Number of Hours

Specify the number of hours until the prospect is available for a callback. Leave the field blank to make the callback at the same time of day. You can only add hours in full hour increments. You can use Add Number of Days and Add Number of Hours together. For example, to call the prospect the next day, but one hour later, enter 1 in the Add Number of Days field and 1 in the Add Number of Hours field.

Defining Acceptable Times

Access the Set Acceptable Times page (TeleSales, Manage TeleSales Agents, Set Acceptable Times).

Set Acceptable Times

Business Unit COM01

Campaign North America DSL Sales Push **Activity** Telemarketing to Current Consumers

*Day of the Week	*Start Time	*End Time	
Friday	10:00AM	6:00PM	🗑️
Monday	11:00AM	9:00PM	🗑️
Wednesday	9:00AM	5:00PM	🗑️
Thursday	2:00PM	5:00PM	🗑️

* Required Field

Set Acceptable Times page

Use this page to specify times when it is acceptable for telesales agents to call for the specified campaign and activity. Setting acceptable times is activity specific.

Day of the Week

Select the day of the week when calls are acceptable, or select *All* if all days are allowed.

Start Time, End Time

Specify the hours between which calls are acceptable. Time values should include "AM" or "PM" (for example, 6:00 PM) or be given in 24-hour format (for example, 6:30 PM is 18:30).

Add Acceptable Time

Click to add the current information and insert a blank row below the current one.

Processing Prospects and Responses

This section discusses how to:

- View executing telesales campaigns.
- Contact prospects.
- Enter responses received through channels other than telesales.

See Also

[Chapter 9, "Creating Campaigns and Activities," Defining Activities, page 159](#)

Pages Used to Process Prospects and Responses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
TeleSales	RT_AGT_CMPGN_SMRY	TeleSales, Call Prospects	View current telesales campaigns.
Call Prospects	RT_AGT_CALL_PRSPT	<ul style="list-style-type: none"> • TeleSales, Call Prospects Click the Campaign Activity link on the TeleSales page. • TeleSales, Record Responses Click the Prospect link on the Find An Existing Prospect page. 	Enter responses to marketing contacts.
Activity Details	RT_AGT_CMPGN_DTL	TeleSales, Call Prospects, Activity Details	TeleSales agents can view general information about a telesales campaign activity, including the products offered and offer details.
Product Info (product information)	RT_AGT_PROD_INFO	TeleSales, Call Prospects, Product Info	TeleSales agents can view detailed information about the offered product.
Record Prospect Responses	RT_AGT_CMPGN_SMRY	TeleSales, Record Prospect Responses	Record responses received outside of a direct contact (for example, from a response card).

Viewing Executing TeleSales Campaigns

Access the TeleSales page (TeleSales, Call Prospects).

Click a campaign activity name to access the Call Prospects page.

Contacting Prospects

Access the Call Prospect page.

TeleSales

Refresh | Launch Script | Order Capture | 360-Degree View | >>
Personalize

Activity Name Telemarketing - Direct Sell **List Count** 9
Offer Name BUY A REFRIGERATOR AND GET FREEZER SHELVES FREE **Calls Remaining** 8

Call Prospect
Activity Details
Products

Prospect Information

Name Myers,Jana **Phone** 847/666-1414 - Home
Address 10 Wicker Park, Smallville, IL, 60202, USA **Company**
Date of Birth 10/23/1951 **Language** English
Gender Female **Email**

Dial Prospect
Launch Script
Refresh Script Results
Order Now

Call Prospect page (1 of 2)

Call Outcome

Call Back
 Call Back Date Time
 Type Code
 Phone Ext

No Contact
 Reason

Close
 Final Disposition
 User Disposition

Collateral Details

*Description	Request Date	Fulfillment History Status	Quantity
<input type="text"/>	09/16/2009	Requested	1.0000

Notes

Call Prospect page (2 of 2)

Note. As agents prepare to make the first contact of a new campaign, they should refer to the Activity Details and Products pages to familiarize themselves with the offer and product before placing a call.

The Call Prospect header area displays the activity and offer names, total list count, and the number of calls remaining. Check to confirm that this is the correct activity and offer.

Assign the First Prospect As agents enter the Call Prospect page for the first time, the Assign the First Prospect button appears. Click the button to populate information about the first prospect in the call list.

Prospect Information

The Prospect Information group box displays the name, the address, the company name (if the prospect is a company contact), and the prospect's telephone number. The Call History scroll area displays information related to previous calls for the displayed activity.

Note. The actual fields and buttons displayed depend on the integration method selected on the Campaign - Activities page.

Call History Displays a record of attempted calls to the prospect.

Note. This grid is not displayed in the screen shot.

Dial Prospect Click to automatically dial the prospect.

Note. The Dial Prospect button only works when a CTI (computer telephony interface) system is in use.

Launch Script Click to launch the script linked to this campaign activity. The script will launch in a new window.

Refresh Script Results After the script has processed, click this button to refresh script results (if any) on this page.

Order Now Click to access the PeopleSoft Order Capture Entry Form page and enter order details. This button only appears when the integration method selected on the Campaign - Activities detail page is set to *Order Capture Direct* when the activity is pushed from PeopleSoft Marketing to PeopleSoft TeleSales.

Send to Order Capture Agent Click to transfer gathered information to an order capture agent. This inserts a worklist item and sends notification to order capture agents using workflow processing. The telesales contact is completed, and the order capture agent completes the order. This button only appears when the integration method selected on the Campaign - Activities detail page is set to *Order Capture Indirect* when the activity is pushed from PeopleSoft Marketing to PeopleSoft TeleSales.

Script Name Displays the name of the script used for the telesales call.

Score Displays the score achieved by the prospect's answers to script questions. This field only appears when the integration method selected on the Campaign - Activities detail page is set to *Sales Leads* when the activity is pushed from PeopleSoft Marketing to PeopleSoft TeleSales.

Lead Rating	The value of this field is automatically determined based on the score of the prospect's response to the script questions. You can override the value. Lead Rating values are defined in the PeopleSoft Sales application setup. The values <i>Cold</i> , <i>Hot</i> , and <i>Warm</i> are delivered with the system. This field only appears when the integration method selected on the Campaign - Activities detail page is set to <i>Sales Leads</i> when the activity is pushed from PeopleSoft Marketing to PeopleSoft TeleSales.
Rating Category	The value of this field is automatically determined based on the score of the prospect's response to the script questions. You can override the value. Values are <i>Qualified</i> and <i>Unqualified</i> . This field only appears when the integration method selected on the Campaign - Activities detail page is set to <i>Sales Leads</i> when the activity is pushed from PeopleSoft Marketing to PeopleSoft TeleSales.
Prospect Profile Information	This section displays profile information about the prospect. The information displayed in this section is set up in the profile group, and then the new profile group can be associated to TeleSales prospect and can be displayed on any or all activities. After prospects are called, the database is populated with the results and a meaningful audience can be generated based on the criteria in the new profiles. When building an audience, users select criteria to cull the targeted people from the database. Profiles are used as audience criteria.
Call Outcome	Use options in the Call Outcome group box to record results of this call. You must specify a call outcome.
Call Back Date	Select to specify a particular time to call back. Enter the date and time.
Phone	Enter a callback phone number for the prospect. This can be the same as the original phone number used for the prospect, but does not have to be. If no callback phone number is specified, the original phone number is used.
Type	The phone type being called (for example, Business).
Code	The country code associated with the specified phone number.
No Contact	Select to indicate that the call has not been completed to the named contact. Select a reason from the available options. Values are: <i>No Response</i> , <i>Not Available</i> , and <i>Wrong Number</i> . Selecting <i>No Response</i> results in the call being placed back in the call queue.

Close Select to indicate that the call has been completed. Select a reason from the available options. Values displayed depend on the integration method selected for the activity and include *Do Not Call Again*, *Generate Lead*, *Not Interested*, *Pass to Order Capture*, *Sale*, *Send Email*, and *Send Mail*.

Note. Selecting *Do Not Call Again* places a flag on the prospect's record in the Business Contact table, to prevent future contact through any marketing channel.

Disposition Select a disposition reason from the available options. Disposition reasons are user-defined under the TeleSales Set Up menu.

Collateral Details

Use the Collateral Details scroll area to enter collateral materials requested by the call prospect.

Note. A request for collateral completes a call. You cannot send collateral and assign a callback.

Description Select one of the available collateral items.

Request Date Enter the date that the fulfillment product is requested. This is typically the day that the call is closed.

Fulfillment History Status Enter the status of the product fulfillment. Values are: *Back Order*, *Cancelled*, *Partial*, *Requested* (default value), and *Shipped*.

Quantity Enter the fulfillment product quantity requested. The default value is *1.0000*.

Notes

The Notes group box displays any notes that have been attached to the prospect.

Using Offer Presentment with TeleSales

If offer presentment has been enabled for TeleSales, active offers will pop up automatically on the agent's screen. Additionally, a spinning dollar sign icon will appear in the toolbar. Agents can click on this icon to retrieve any passive offers that are recommended by the third-party optimization engine. You can configure the maximum number of offers that will be presented on the pop-up page. Refer to the Offers documentation for more information about offers and how they are handled.

The Call Outcome section on the Call Prospect page tracks the disposition of the call and customer's response to the specific offer associated with the campaign activity. Note that the outcome of offer recommendations from the third-party optimization engine have no bearing on the outcome of the offer on the activity assigned to that prospect. In other words, if the prospect accepts an offer from the third-party optimization engine and an order is generated, when the agent returns to the Call Prospect page the agent still needs to present the offer that was associated to the campaign activity and then record the customer's response to this particular offer before being able to close out this call and move on to the next prospect on the list.

Prospects' responses to offers can be viewed in the Offer History node in the 360 Degree View

Offer presentation can be enabled within TeleSales by designing and activating an AAF policy using the Display Offer Alert action. The trigger point defined on the policy determines when the offer recommendations are presented by the third-party optimization engine. The following new trigger points have been identified:

Name	Description/Usage
Assign New Prospect	Trigger an action when the Assign New Prospect button is clicked.
Save and Assign Next Prospect	Trigger an action when the Save and Assign Next Prospect button is clicked.
When Telemarketing is Presented	Trigger an action when the Telemarketing (TeleSales) component is loaded
When Offer Icon is Clicked in Telemarketing	Trigger an action when the Offer icon in the Telemarketing (TeleSales) toolbar is clicked.

The following policies should be set up to enable offer presentation:

Policy	Trigger Points	Action to be Executed	Policy Conditions
Create a policy for each trigger point to demonstrate Active Offer presentation	When Telemarketing is Presented Assign New Prospect Save and Assign Next Prospect	Display Offer Alerts: configure this action to present maximum number of offers = 5 and elect to display offer scores.	Use term of current date and set to less than or equal to the chosen end date for this policy.
Create a policy for each trigger point to display the spinning dollar icon on the TeleSales toolbar.	When Telemarketing is Presented Assign New Prospect	Display Offer Icon	Use term of current date and set to less than or equal to the chosen end date for this policy.
Create a policy to retrieve passive offer recommendations when spinning dollar icon is clicked.	When Offer Icon is Clicked in Telemarketing	Display Offer Alerts: configure this action to present maximum number of offers = 5 and elect to display offer scores.	Use term of current date and set to less than or equal to the chosen end date for this policy.

See [Chapter 6, "Using Offers," page 75.](#)

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Defining Scripts"

Entering Responses Received Through Channels Other Than TeleSales

Access the Record Prospect Responses page (TeleSales, Record Prospect Responses).

Record Prospect Responses								
Blaine, Richard C.								
Campaigns								
Find  Download First 1-3 of 3 Last								
Campaign Activity	Provider Group	Priority	Start Date	Start Time	End Date	End Time	List Count	Completed Calls
Telemarketing - Direct Sell	Telemarketing East	Medium	10/01/2002	12:00AM	10/01/2010	11:59PM	9	1
Telemarketing - Quality Retail Outlets	Telemarketing East	Medium	10/01/2002	12:00AM	10/01/2010	11:59PM	7	0

Record Prospect Responses page

To consolidate responses from campaign activities utilizing channels other than telesales, PeopleSoft TeleSales enables agents to record responses without actually contacting the prospect by telephone. For example, a campaign might employ both telesales and direct mail activities. Responses from the direct mail activity are entered into the system manually using the Record Responses component.

Click an activity name to display the Find an existing Prospect search page, which displays a list of prospects associated with that activity (the page displays new prospects only, not assigned and callback prospects). Selecting a prospect name will take you to the Call Prospect page, where you can enter the necessary information (for example, you can execute a script and enter the answers that the prospect has filled out on the response card).

Note. Prospect names with callback times that are still in the future are not linked.

See [Chapter 10, "Using PeopleSoft TeleSales," Contacting Prospects, page 200.](#)

Appendix A

Delivered Web Services and Web Service Operations

This appendix discusses the Generate Audience, Retrieve Audience, Update Audience, and Search Audience web services, and provides guidelines on how to view message elements.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services," Understanding Web Services

Generate Audience

Oracle's PeopleSoft CRM delivers the Generate Audience service operation for the Generate Audience (RA_GEN_AUDIENCE) web service. This operation is used to generate an audience list. The audience generation operation is intended to be run after the audience details and criteria have been defined.

The audience type can be *Dynamic* or *Fixed*. In order to generate an audience list, the User ID executing the web service must be a team member or owner of the audience.

This table provides the technical names, operation type, and messages names of the service operation that is related to the Generate Audience web service:

<i>Service Operation</i>	<i>Operation Type</i>	<i>Request Message</i>	<i>Response Message</i>
Generate Audience (RA_GENERATE_AUDIENCE)	Asynchronous	RA_GENAUD_REQ_CON T	RA_GENAUD_RES_CON T

Retrieve Audience

Oracle's PeopleSoft CRM delivers the Retrieve Audience service operation for the Retrieve Audience (RA_RETRIEVE_AUD) web service. This operation is used to retrieve the result list for an audience.

In order to retrieve a result list for an audience, the User ID executing the web service must be a team member or owner of the audience.

This table provides the technical names, operation type, and messages names of the service operation that is related to the Retrieve Audience web service:

Service Operation	Operation Type	Request Message	Response Message
Retrieve Audience (RA_RETRIEVE_AUDIENCE)	Synchronous	RA_RETAUD_REQ_CONTENT	RA_RETAUD_RES_CONTENT

Update Audience

Oracle's PeopleSoft CRM delivers the Update Audience service operation for the Update Audience (RA_UPD_AUDIENCE) web service. This operation is used to update an audience.

In order to update an audience, the User ID executing the web service must be a team member or owner of the audience.

This table provides the technical names, operation type, and messages names of the service operation that is related to the Update Audience web service:

Service Operation	Operation Type	Request Message	Response Message
Retrieve Audience (RA_UPDATE_AUDIENCE)	Synchronous	RA_UPD_AUD_CONTAINER	RA_UPD_RES_CONTAINER

Search Audience

Oracle's PeopleSoft CRM delivers the Search Audience service operation for the Search Audience (RA_SEARCH_AUDIENCE) web service. This operation is used to search for an audience.

In order to search for an audience, the User ID executing the web service must be a team member or owner of the audience.

The implicit filtering for the search is similar to that of the Audience configurable search setting for *All Audiences as Team Member*.

This table provides the technical names, operation type, and messages names of the service operation that is related to the Search Audience web service:

Service Operation	Operation Type	Request Message	Response Message
Retrieve Audience (RA_SRCH_AUD_SERVICESO)	Synchronous	RA_SRCHAUD_REQ_CONTENT	RA_SRCH_AUD_RES_CONTENT

Viewing Message Elements

You can view the elements and fields that are included in each service operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

- Select PeopleTools, Integration Broker, Integration Setup, Messages.
- Enter the name of the message you want to view in the Message Name field and click Search.
- The Message Definition page appears. Click the message name link under the Parts grid.
- Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

Appendix B

Using Interactive Reports in PeopleSoft Marketing Applications

This chapter provides an overview of interactive reports and discusses how to:

- Use interactive reports for PeopleSoft Marketing.
- Use interactive reports for PeopleSoft TeleSales.
- Exporting dialog responses.

Understanding Interactive Reports

Interactive reports are a dynamic, interactive, high-level implementation of PeopleTools Analytic Calculation Engine (ACE). These reports do not require an analytic logic server or a separate database to store data. You can save results by exporting them to Microsoft Excel, or you can print them.

With interactive reports, you can view transactional data in multidimensional online reports. To determine how information is displayed, drag dimension options onto the report grid. Data can be further filtered by selecting a single value for any dimension option.

For example, using the Campaign Performance Forecast Analysis interactive report, you can analyze campaign performance for all campaigns, for a single campaign, for all campaigns and all activities, for a single campaign and all activities, or for a single campaign and a single activity, among other options. Some interactive reports also enable you to perform what-if scenarios.

While interactive reports are interactive, the communication between interactive reports and the PeopleSoft CRM database is one-way. The changes that you make on an interactive report do not affect data in the database. Interactive reports appear in separate windows. You cannot transfer from an interactive report to a component to access data. In PeopleSoft Marketing, user roles and access profiles control access to forecasts and thereby to interactive reports.

PeopleSoft marketing applications provides seven interactive reports:

- Campaign Performance Forecast Analysis (PeopleSoft Marketing).
- Dialog Performance Forecast Analysis (PeopleSoft Marketing)
- Dialog Survey Report (PeopleSoft Marketing)
- Lead Acceptance (PeopleSoft TeleSales).
- Lead Quality (PeopleSoft TeleSales).

- Sales Effectiveness (PeopleSoft TeleSales).
- Sales Conversion Rate (PeopleSoft TeleSales).

Note. You must have Microsoft Internet Explorer 5.1 or higher to access interactive reports.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Using Interactive Reports"

Marketing Center Security and Interactive Reports

The following Interactive Reports use the Marketing Center hierarchy:

- Dialog Performance Forecast Report.
- Dialog Survey Report.

See *and PeopleSoft CRM for Higher Education 9.1 PeopleBook, "Using Marketing Center Security."*

Using Interactive Reports for PeopleSoft Marketing

This section discusses how to:

- View key performance measurements.
- Perform what-if scenarios.
- Establish assumptions.

Page Used to Use Interactive Reports for PeopleSoft Marketing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Campaign Performance / Forecast Analysis	RA_WHATIF_UPD	Marketing, Interactive Reports, Campaign Performance Forecast or Click the Reporting button in the Marketing Toolbar	View key measurements, perform what-if scenarios, and establish assumptions for marketing campaigns.
Dialog Performance / Forecast Analysis	RY_DIALOG_IR_ADD	Marketing, Interactive Reports, Dialog Performance Forecast	View key measurements, perform what-if scenarios, and establish assumptions for online dialogs.

Page Name	Definition Name	Navigation	Usage
Dialog Survey Report	RY_DLG_SRY_RPT	Marketing, Interactive Reports, Dialog Survey Report	View results of Online Marketing survey dialogs.

Viewing Key Campaign Performance Measurements

Access the Campaign Performance Analysis page (Marketing, Interactive Reports, Campaign Performance Forecast).

View key measurements of campaign performance in one report. By changing the dimensions, you can view results from various angles.

Results Measured

The page measures:

- Audience size.
- Number of leads.
- Number of opportunities.
- Number of customers.
- Response rate.
- Conversion rate.
- Campaign cost.
- Gross revenue.
- Gross profit.

Available Dimensions

Results can be measured by:

- Rollup
- Campaign.
- Activity.
- Channel.

Performing What-If Scenarios

Access the Campaign Forecasting Analysis page (Marketing, Interactive Reports, Dialog Performance Forecast).

Perform what-if scenarios using actual and projected campaign results. You can create and save multiple scenarios to test different assumptions.

Results Measured

The Campaign Forecasting Analysis page measures actual performance against projected results for:

- Audience size.
- Projected audience size.
- Response rate.
- Projected response rate.
- Conversion rate.
- Projected conversion rate.
- Projected number of leads.
- Projected number of customers.
- Projected total cost.
- Projected revenue.
- Projected profit.

Available Dimensions

Results can be projected by:

- Campaign.
- Activity.
- Channel.
- Roll up campaign.

Establishing Assumptions

Access the Assumptions page.

Establish values for three factors:

- Unit campaign cost.
- Unit acquisition cost.
- Revenue per customer.

These values are used to project costs and revenues relative to real or projected results.

Available Dimensions

Results can be projected by:

- Campaign
- Activity
- Roll Up Campaign

Viewing Dialog Performance Measurements

Access the Dialog Performance/Forecast Analysis page (Marketing, Interactive Reports, Dialog Survey Report).

View key measurements of dialog performance in one report. By changing the dimensions, you can view results from various angles.

The report has two tabs: Reach and Response

Results Measured

The Reach page measures:

- Audience count.
- Projected count.
- Hard bounces.
- Soft bounces.
- Unknown bounces.
- Percent bounces.
- Projected percent bounces.
- Projected bounced.
- Queued.
- Expired.
- Reach delivered.
- Reach projected delivered.
- Opened.
- Open rate percent.
- Reopened.
- Clickthrough.

- Clickthrough rate percent.
- Projected CTR percent.
- Projected percent response.

Note. The Open Rate percentage for emails is calculated based on the number of Opened divided by the number of Reach (those emails that were delivered, with no bounces included). For Opened and Reopened, only email in HTML format is tracked (using a 1x1 clear pixel image embedded in the email). When emails are opened multiple times, the Reopen value will reflect each subsequent opening after the first (for example, if an email is opened three times, it will show Opened as 1 and Reopened as 2). Be aware that the Reopened results might not be accurate if the user's email client (for example, Microsoft Outlook) caches the email content.

The Response page measures:

- Response count.
- Projected response count.
- Visits.
- Visitors.
- Projected visitors.
- Percent response.
- Projected percent response.
- Submitters.
- Projected submitters.
- Percent submitters.
- Projected percent submitters.
- Percent complete.

Available Dimensions

Results can be projected by:

- Activity (Action)
- Audience

Viewing Survey Reports

To view survey reports, use the System Process Requests (PRCSMULTI) component.

Access the Dialog Survey Report page.

The Dialog Survey Report displays survey summary results. The default dimension displayed is All_Contacts. Note that the survey data selected for the report will only include the last survey instance of each case.

To run a new survey report, you must enter the relevant business unit, dialog name (only dialogs in Live state are available for selection), and the date range in which the survey was submitted.

Note. If you will be generating Survey Reports frequently, it will increase the data volume in the report table and affect report performance. Starting a daily-based report data purge process will help to maintain the Survey report generation performance. To do this, select PeopleTools, Process Scheduler, System Process Requests. Create a new Run Control ID: OLM_ACE_REPORT_PURGE, and then click Run. Select the check box for the process named RY_RPT_SV_CP and then click OK.

See PeopleSoft Enterprise Customer Relationship Management 9.1 Installation Guide

Results Measured

This page measures the following based on question, survey status, and document name:

- Survey score: The average survey score (not a summation), depending on the level of the dimension chosen. The average can adjust for every dimension selected.

Note. The survey score displayed per contact is an average, depending on the number of surveys sent and responded to by the contact. Also, the overall survey score displayed for all contacts is also an average of all surveys taken by all of the contacts. To view survey scores for each individual survey, refer to the Case page.

- Survey sent: The number of surveys sent to the contact.
- Incomplete survey: The number of surveys that were opened but not completed.
- Completed survey: The number of surveys completed.
- Response rate %: Calculated by $\text{Survey Sent} / (\text{Incomplete Survey} + \text{Completed Survey}) * 100$.

Available Dimensions

Results can be projected by:

- Assigned To
- Case ID
- Region
- Location
- Company Name
- Contact (the default dimension when the page is opened)
- Case Priority

Using Interactive Reports for PeopleSoft TeleSales

This section discusses how to:

- View lead status.
- Evaluate lead quality.
- Measure script completion.
- Measure completed sales.

Pages Used to Use PeopleSoft TeleSales Interactive Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Lead Acceptance	RT_LEAD_ACCEPT_UPD	TeleSales, Interactive Reports, Lead Acceptance	See if leads have been accepted or rejected.
Lead Quality	RT_LEAD_QUAL_UPD	TeleSales, Interactive Reports, Lead Quality	Compare telesales agent and sales representative lead quality ratings.
Sales Effectiveness	RT_SALES_EFFEC_UPD	TeleSales, Interactive Reports, Sales Effectiveness	Determine if telesales agents are completing their scripts.
Sales Conversion Rate	RT_SALES_CONV_UPD	TeleSales, Interactive Reports, Sales Conversion Rate	View completed sales for prospects transferred to order capture.

Viewing Lead Status

Access the Lead Acceptance page (TeleSales, Interactive Reports, Lead Acceptance).

View how many of the leads that have been passed from telesales agents to sales representatives have been accepted or rejected, and how many are yet to be acted upon.

Results Measured

The Lead Acceptance interactive report measures:

- Leads passed from telesales to sales.
- Leads accepted by sales representatives.
- Leads rejected by sales representatives.
- Leads pending (not yet accepted or rejected).

- Percent of passed leads accepted.
- Percent of passed leads rejected.
- Percent of passed leads pending.

Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.
- TeleSales territory.
- TeleSales team.
- TeleSales agent.
- Week.

Evaluating Lead Quality

Access the Lead Quality page (TeleSales, Interactive Reports, Lead Quality).

Compare the quality rating of a lead as determined by the telesales agent with the rating determined by a sales representative. This enables you to determine if there are discrepancies between the lead quality ratings given by telemarketers versus those of sales representatives. By analyzing results using different dimensions, you can identify problems at any level.

The report does not reveal if leads are over or under rated, but only that there are differences.

Results Measured

The Lead Quality interactive report measures:

- Leads passed from telesales to sales
- Leads the lead quality rating determined by the telesales agent matches that of the sales representative.
- Percentage of passed leads were the lead quality rating matches.

Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.

- TeleSales territory.
- TeleSales team.
- TeleSales agent.
- Sales representative.
- Week.
- If the lead has been accepted or rejected by the sales representative.

Measuring Script Completion

Access the Sales Effectiveness page (TeleSales, Interactive Reports, Sales Effectiveness).

Determine if telesales agents are able to complete scripts during their telesales calls. The report measures script completion for closed calls only.

Results Measured

The Sales Effectiveness interactive report measures:

- Closed prospects.
- Percent of closed calls with scripts completed.
- Percent of closed calls with scripts partially completed.
- Percent closed calls with scripts not started.

Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.
- TeleSales team.
- TeleSales provider group.
- Week.

Measuring Completed Sales

Access the Sales Conversion page (TeleSales, Interactive Reports, Sales Conversion Rate).

View how many prospects transferred to order capture actually result in completed sales. The report only analyzes calls from telesales activities where the activity integration method is set to order capture direct or order capture indirect. Results are not measured until the call has been closed by the telesales agent.

Results Measured

The Sales Conversion interactive report measures:

- Closed prospects.
- Percent sale completed.
- Percent pending sale (sale not yet completed).
- Percent no sale.

Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.
- TeleSales team.
- TeleSales agent.
- Week.

Exporting Dialog Responses

PeopleSoft Online Marketing dialogs and surveys allow you to gather useful information from audiences that respond to the dialogs. While operational reports provide a useful and powerful way to view and analyze these responses, it is also useful to be able to easily export this information to a Microsoft Excel-formatted report. Using a simple tool, you can export Online Marketing dialog and survey information to an XML file, which can then be imported into Excel.

Pages Used to Export Dialog Responses

Page Name	Definition Name	Navigation	Usage
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs, URL Maintenance	Specify the URL of the FTP server (must be a secured (FTPS) server where the exported file will be attached.

Page Name	Definition Name	Navigation	Usage
Dialog Response Export	RY_DRE_CTL	Marketing, Operational Reports, Document Responses, Dialog Response Export	Specify information about the report to be exported.

Exporting Dialog Responses

Access the Dialog Response Export page (Marketing, Operational Reports, Document Responses, Dialog Response Export).

- Report ID** Enter a meaningful report ID that defines the type of report you are generating. For security purposes, report IDs are unique to each user (for example, if two users each defined a report named June 09 Survey Responses, each would only see his or her own report).
- Description** Enter a description of the report and its purpose.
- Business Unit** Select the business unit in which the dialog was created.
- Dialog Name** Select the name of the dialog from the list of available choices. The list will display only the names of dialogs you have permission to access, and will only include Live dialogs.
- Limit responses to Audience** *(Optional)* Enter an audience name to export responses only from members of that audience. You can only choose audiences that you are authorized to view (you must have permission to view both Individual and Aggregate responses for the chosen audience). Leave the field blank to export responses from all respondents, regardless of audience.
- Response From Date** Enter a date if you want to limit the exported responses to only those submitted after that date. Leave the field blank if you do not want to specify a beginning date.
- Through Date** Enter a date if you want to limit the exported responses to only those submitted before that date.

Note. You can enter dates in the Response From Date or Through Date fields, both, or neither, depending on how you want to limit the exported responses.

Appendix C

PeopleSoft Marketing Reports

This appendix provides an overview of PeopleSoft Marketing reports.

Note. All reports in this appendix are Crystal reports and some of them can also be run using Oracle Business Intelligent Publisher (BI Publisher or BIP) as specified. BI Publisher is a template-based reporting solution that have been integrated into PeopleTools. For samples of these reports, see the Portable Document Format (PDF) files that are published with your online documentation.

See Also

PeopleTools 8.52: PeopleSoft Process Scheduler PeopleBook

PeopleTools 8.52: PeopleSoft Applications User's Guide

PeopleSoft Marketing Reports: A to Z

The following PeopleSoft Marketing reports are delivered predefined with the system:

Report ID and Report Name	Description	Navigation	Run Control Page
RAC1000 Campaign Effectiveness	Use this report to view and evaluate leads generated by marketing campaigns over a specified period.	Marketing, Operational Reports, Campaign Effectiveness	RUN_RAC1000
RAC1001 Activity Effectiveness	Use this report to view and evaluate leads generated by marketing campaign activities.	Marketing, Operational Reports, Activity Effectiveness	RUN_RAC1001
RAC1002 Campaign and Activity Effectiveness	Combined Campaign and Activity effectiveness report. This report can be generated using BI Publisher in addition to Crystal Reports.	Marketing, Operational Reports, Campaign and Activity Effectiveness	RUN_RAC1002

Report ID and Report Name	Description	Navigation	Run Control Page
RAC1003 Campaign Count by Score	This report is a frequency report displaying percentage, number of people scripted and the score of the script by Campaign / Activity.	Marketing, Operational Reports, Campaign Count by Score	RUN_RAC1003
RAC2000 Task Management	This report shows all the Tasks irrespective of whether they are Campaign Tasks or Content Tasks. Using the report parameters you may obtain a list of Tasks a) for a particular Campaign b) for a Particular Content c) All Campaign and Content Tasks	Marketing, Operational Reports, Task Management	RUN_RA2000
RAC7000 Campaign ROI (return on investment)	This report compares the actual revenue generated by a particular activity over its actual cost. A negative ROI indicates costs exceed revenues. The report is grouped by Rollup Campaigns, Campaigns. This report can be generated using BI Publisher in addition to Crystal Reports.	Marketing, Operational Reports, Campaign ROI	RUN_RA7000
RAC8000 Campaign Expense	This report shows the forecast and actual costs incurred for each campaign activity. The Variance column indicates the deviation of actual over forecast cost. (negative variance indicates you have spent more than forecasted) This report is grouped by Campaign within Rollup Campaign.	Marketing, Operational Reports, Campaign Expense	RUN_RA8000
RAC9000 Content Management	This report audiences all defined content and audiences quantity and status of each item. The report is grouped by Parent Content.	Marketing, Operational Reports, Content Management	RUN_RA9000

Report ID and Report Name	Description	Navigation	Run Control Page
RAC9001 Campaign-Content Management	This report audiences all defined content for a particular campaign activity. The report is grouped by Campaign and Parent Content.	Marketing, Operational Reports, Campaign Content Management	RUN_RA9001
RAC10000 Campaign Management	This report shows audiences all campaigns and activities under a Rollup Campaign.	Marketing, Operational Reports, Campaign Management	RUN_RA1000
RUN_RCOM01 Campaign Counts	This report shows all counts for a telesales campaign.	TeleSales, Reports, Campaign Counts Report	RUN_RCOM01
RUN_RCOM02 Team Counts	This report shows all counts for a telesales team.	TeleSales, Reports, Team Counts Report	RUN_RCOM02

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