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# PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook

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**August 2006**

PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook  
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# About This PeopleBook

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

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## PeopleSoft Enterprise Application Prerequisites

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

You might also want to complete at least one introductory training course, if applicable.

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

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

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## Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

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## Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

### Obtaining Documentation Updates

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

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

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### See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](http://www.oracle.com/support/support_peoplesoft.html)

### Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

#### Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

#### Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, [http://oraclestore.oracle.com/OA\\_HTML/ibeCCtpSctDspRte.jsp?section=14021](http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021)

## Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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## Typographical Conventions and Visual Cues

This section discusses:

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

### Typographical Conventions

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

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

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

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

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

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**Note.** Example of a note.

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

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

---

### Warnings

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

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**Warning!** Example of a warning.

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### Cross-References

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

## Country, Region, and Industry Identifiers

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

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

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

### Country Identifiers

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

## Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

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

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

## Currency Codes

Monetary amounts are identified by the ISO currency code.

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## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at [appsdoc@us.oracle.com](mailto:appsdoc@us.oracle.com).

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

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## Common Elements Used in PeopleBooks

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

<b>Once, Always, and Don't Run</b>	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
<b>Process Monitor</b>	<p>Click to access the Process List page, where you can view the status of submitted process requests.</p>
<b>Report Manager</b>	<p>Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).</p>
<b>Request ID</b>	<p>An ID that represents a set of selection criteria for a report or process.</p>
<b>Run</b>	<p>Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.</p>
<b>SetID</b>	<p>An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.</p>
<b>Short Description</b>	<p>Enter up to 15 characters of text.</p>
<b>User ID</b>	<p>An ID that represents the person who generates a transaction.</p>



# PeopleSoft Marketing Applications Preface

This preface discusses:

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

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

---

## PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

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

- Workforce Management.

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

- Interactions and 360-Degree Views.

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

- Self-Service for Customers.

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

- Relationship Management.

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

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

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

## See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*

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# PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft Enterprise CRM 9 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 Natural Language Processing (NLP) and 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 Enterprise CRM 9 Automation and Configuration Tools PeopleBook*

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# PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The PeopleSoft Enterprise CRM 9 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. PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook.

### **See Also**

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*

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## **PeopleSoft Enterprise CRM Product and Item Management**

The *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft Enterprise CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

### **See Also**

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*

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## **PeopleTools PeopleBooks**

Cross-references to PeopleTools documentation refer to the PeopleTools 8.48 PeopleBooks.



# 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 telemarketing initiative. An online dialog enables you to define an internet marketing channel (dialog) to run an internet campaign from start to finish. A rollup is a program created to serve as a parent to one or more child programs.

Essentially, the purpose of a marketing program is to 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 Enterprise Online Marketing 9 PeopleBook*

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### 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 Telemarketing 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 Telemarketing 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 Enterprise CRM 9 Application Fundamentals PeopleBook*, *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, and *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, with information on where to find the most up-to-date version of each.

## See Also

*PeopleSoft Enterprise Setup Manager for Customer Relationship Management 9 PeopleBook*

## CHAPTER 2

# Navigating in PeopleSoft Marketing

This chapter discusses how to navigate in PeopleSoft Marketing.

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## 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.

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

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### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*

## Pages Used to Navigate in PeopleSoft Marketing

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

### Marketing Center

The Marketing Center custom navigation pages are geared to the person in your organization who is focused on developing and maintaining various marketing programs and audiences, 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.
Marketing Programs	Click Marketing Programs on the Marketing Center page.	View program summary information, and sort or filter by program attributes.

<b>Page Name</b>	<b>Navigation</b>	<b>Usage</b>
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.
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.

<b>Page Name</b>	<b>Navigation</b>	<b>Usage</b>
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.
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.
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

<b>Page Name</b>	<b>Navigation</b>	<b>Usage</b>
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.
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.

Page Name	Navigation	Usage
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

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

## Defining PeopleSoft Marketing Business Units

To set up PeopleSoft Marketing business units, use the Marketing Definition (RA\_BUS\_UNIT\_GBL) component.

Access the Marketing Definition page.

Marketing Definition page

**Default SetID**

Select the default setID to associate with the business unit.

---

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

---

**Currency Code**

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

**Sales Business Unit**

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

**Printer**

Select a printer name for correspondence management.

**Create Business Unit**

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

---

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

---

## CHAPTER 4

# Setting Up PeopleSoft Enterprise Marketing and Telemarketing

This chapter discusses how to:

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

---

## Setting CRM Application Security for Enterprise Marketing

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

### **See Also**

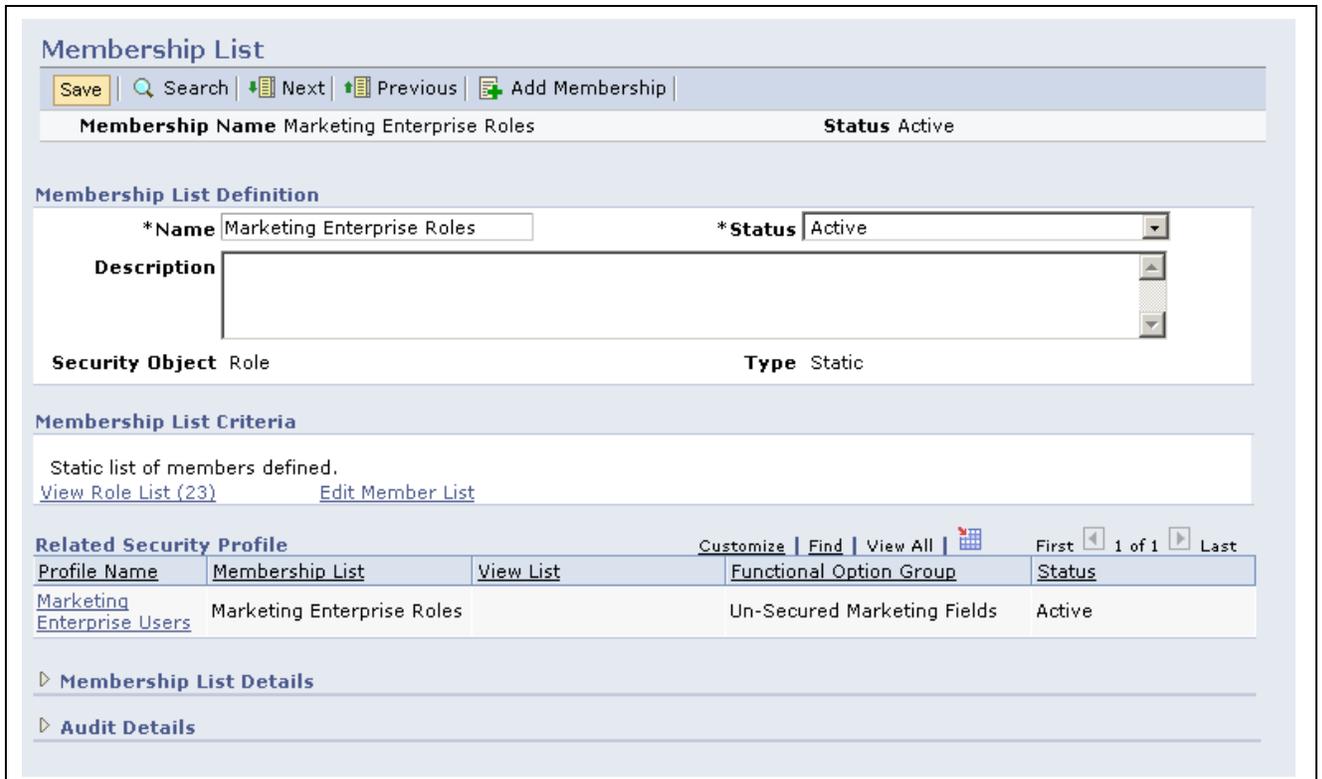
*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*

## Pages Used to Set CRM Application Security for Enterprise Marketing

Page Name	Object Name	Navigation	Usage
Membership List	RSEC_MEMBER_SMRY	Set Up CRM, Security, CRM Application Security, Search Membership List	Set up Enterprise Marketing roles as a membership list.
Add Membership List	RSEC_ML_ROLE	Click the Edit Member List link on the Membership List page 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 Enterprise 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.



Membership List page

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

## Adding a Member

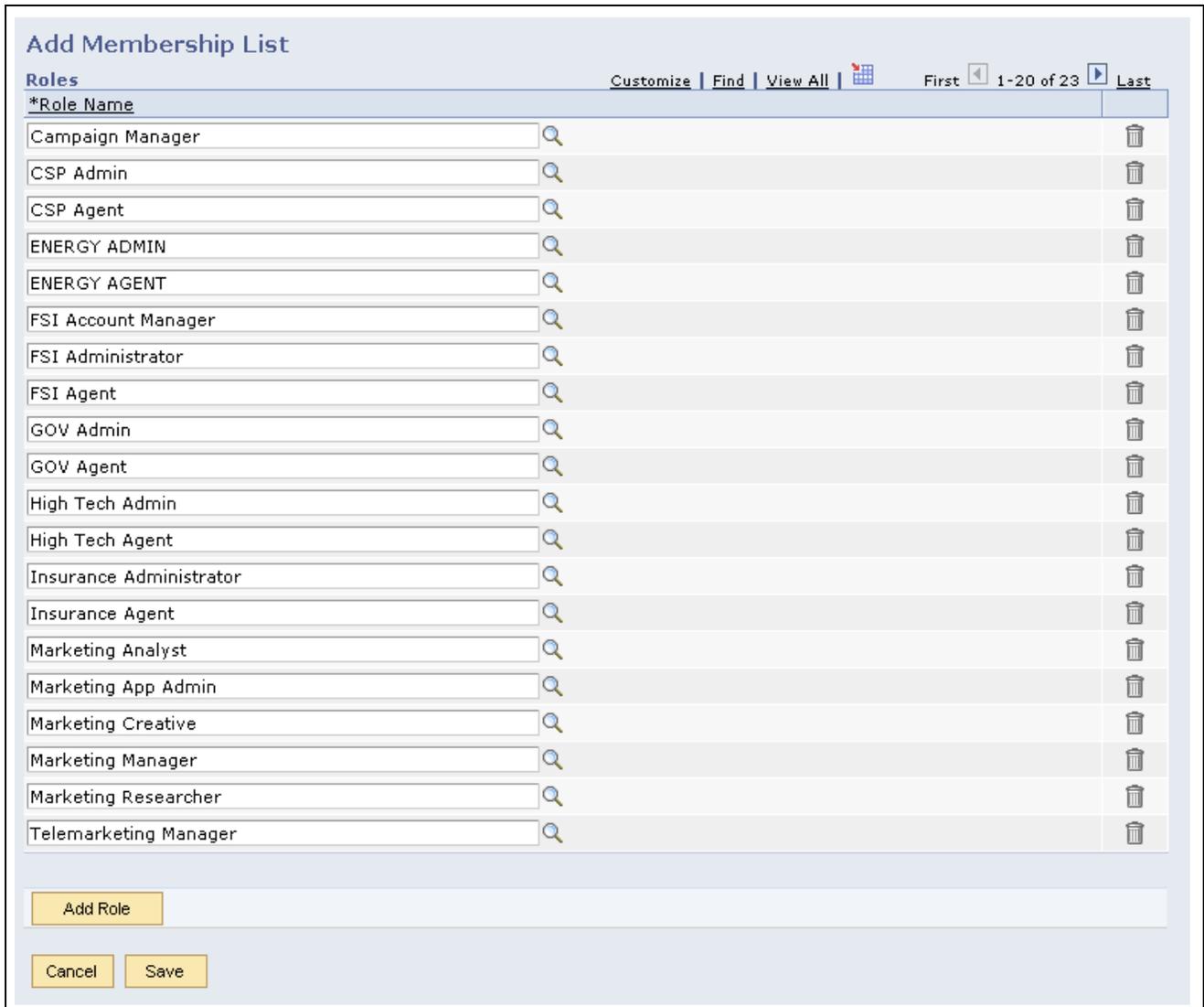
The Add Membership List page displays the security objects (role, person, partner contact, and so forth) included in this membership list. You can edit the objects.

---

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

---

Access the Add Membership List page.



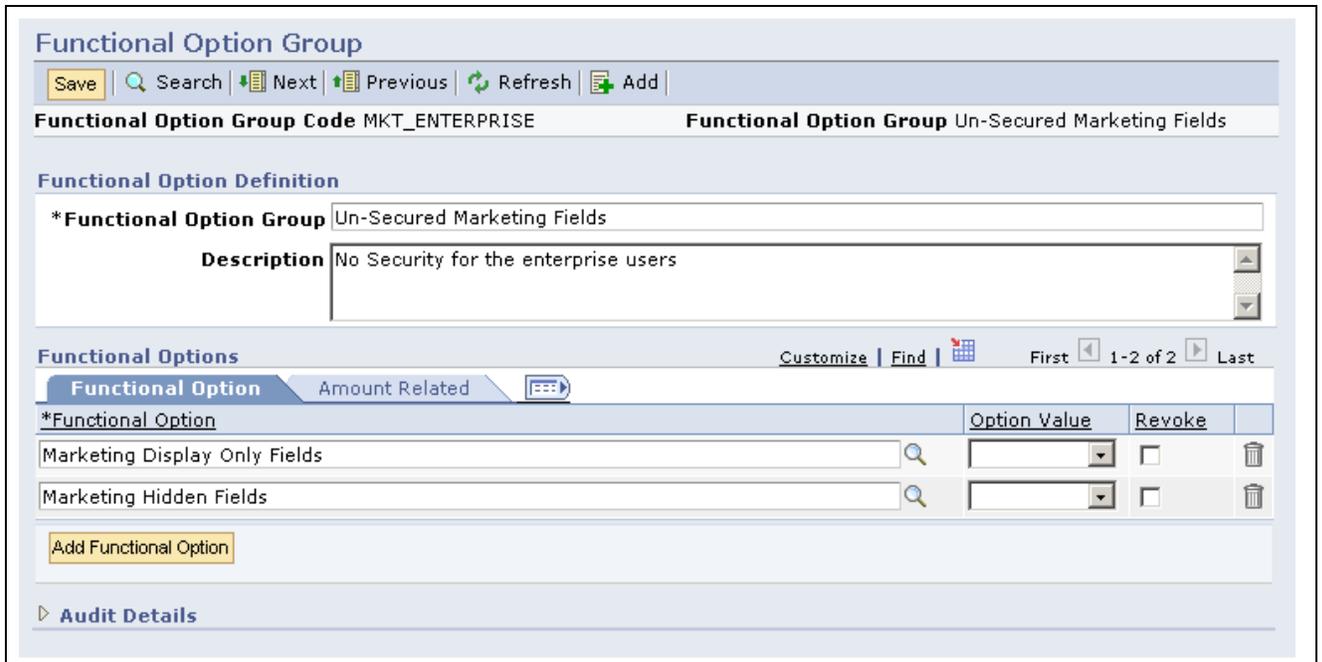
Add Membership List page

**Name** Enter the name of the security object.

**Add Role** Click this button to add a new role to the list.

## Setting Up a Functional Option Group

Access the Functional Option Group page.



Functional Option Group page

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

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*

## Setting Up a Security Profile

Access the Security Profile page.



Security Profile page (1 of 2)



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 Enterprise CRM 9 Application Fundamentals PeopleBook*

## Setting Dataset Security for Enterprise Marketing

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

**See Also**

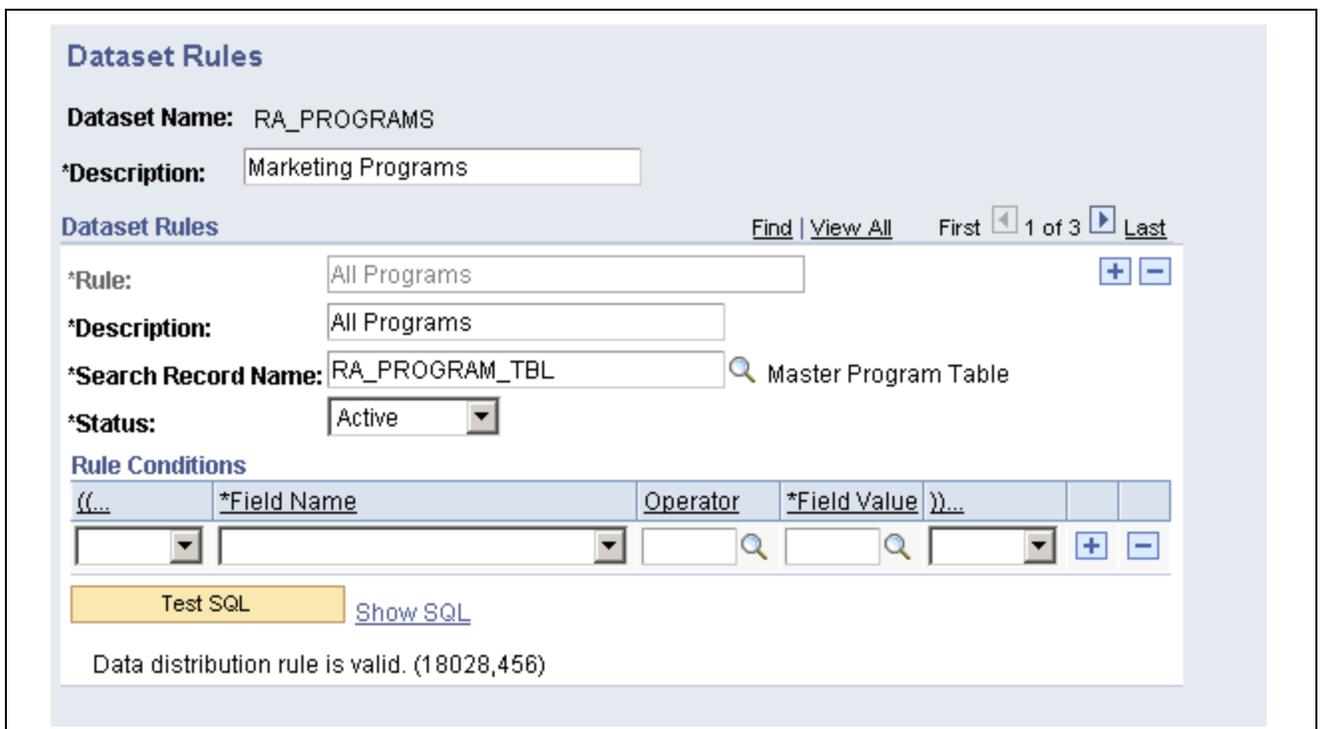
*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*

**Page Used to Set Dataset Security for Enterprise Marketing**

Page Name	Object Name	Navigation	Usage
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.



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 Enterprise Marketing**

This section describes how to set display templates for Enterprise Marketing.

To set display templates for Enterprise Marketing, use the Component Configuration (RA\_COMP\_CFG) component.

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*

## Page Used to Set Display Templates for Enterprise Marketing

Page Name	Object Name	Navigation	Usage
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	Defines the display templates that will be used when displaying the marketing component(s) that use display templates.
System Data Option	RA_COMP_CFG	Click the System Data Option tab on the Component Configuration page.	Modify display template data.

## Setting Display Templates

Access the Display Template page.

### Display Template

**Template ID** MARKETING **Family** Partner Marketing Family

**Description** Partner Marketing Templates **Component** RA\_CAMPAIGN\_DETAIL

**Pages**

Enable	Page	Add Mode Default	Update Mode Default	Comments
<input checked="" type="checkbox"/>	<a href="#">Program</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<a href="#">Triggers</a>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<a href="#">Tasks</a>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<a href="#">Costs</a>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<a href="#">Audience</a>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<a href="#">Performance</a>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<a href="#">Notes</a>	<input type="checkbox"/>	<input type="checkbox"/>	

**General Options**

Option	Value	Comments
Licensed Product Code	<input type="text" value="Marketing"/>	The Licensed Product that this template applies to.
Licensed Product Description	<input type="text" value="CRM for Marketing"/>	Type in a Description. This will be shown in User Preferences.
Application Set Extension	<input type="text" value="Campaign Class Extensions"/>	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.
Portal Name	<input type="text" value="PARTNER"/>	Select the Portal to use for Transferring using a Content Reference.
Portal Object Name	<input type="text" value="CR_RA_MKT_PROG_DTL_GBL"/>	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

Access the Component Configuration page.

The screenshot shows the 'Component Configuration' page with a 'Display Templates' section. The page has tabs for 'General' and 'System Data Option'. The table below lists four configurations for display templates, each with a trash icon for deletion. At the bottom, there are 'Add', 'Save', and 'Notify' buttons.

*Portal Name	*Component Name	*Market	*Display Template	
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

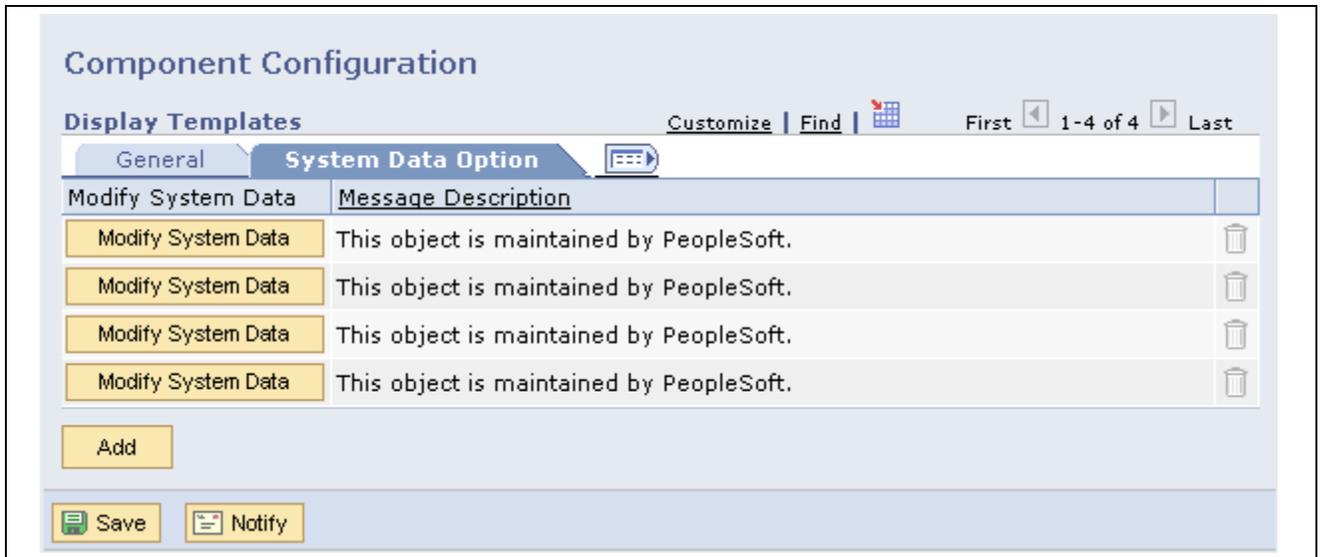
This page defines which display template will be used when displaying the marketing component(s) that use display templates. It is based on the display templates that are defined by default, and the data is set up to use the default display template definitions.

- Add** To add additional templates, click this button and then fill in the necessary fields. Fields that can be added are:
- Portal Name.
  - Component Name.
  - Market.
  - Display Template.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates”.

## Modifying Data

Access the System Data Option page.



System Data Option page

**Modify System Data‘**

Click this button to modify system data for the selected row. Click the General tab and modify the necessary fields. Fields that can be modified are:

- Portal Name.
- Component Name.
- Market.
- Display Template.

---

## Defining Campaign Elements

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

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

## Understanding Campaign Elements

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

<b>Code</b>	<b>Objective</b>	<b>Description</b>
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.
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.

PeopleSoft delivers the following status codes:

<b>Status Code</b>	<b>Status</b>	<b>Description</b>
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.

Status Code	Status	Description
DCLN	Decline	Declined by reviewer.
EXEC	Executing	<p>Being carried out.</p> <p>Before you can change a campaign or wave status to <i>Executing</i>, the statuses of three associated elements must be as follows:</p> <p>Content 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 Enterprise 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, content, 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 Telemarketing applications.</p>
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	Object Name	Navigation	Usage
Marketing Objectives	RA_UD_CMPGN_OBJ	Set Up CRM, Product Related, Marketing, Objectives, Marketing Objectives	Define campaign, dialog, and activity objectives.
Campaign and Activity Statuses	RA_UD_CMPGN_STAT	Set Up CRM, Product Related, Marketing, Campaigns, Statuses, Campaign and Activity Statuses	Define campaign and activity statuses.
Status Rules	RA_UD_STAT_CMB1	Set Up CRM, Product Related, Marketing, Campaigns, Status Rules, Status Rules	Define status rules by establishing valid status changes for campaign objects.
Budget Sources	RA_UD_BUDGT_SRC	Set Up CRM, Product Related, Marketing, Campaigns, Budget Sources, Budget Sources	Define budget sources.
Program Control	RA_PROGRAM_CONTROL	Set Up CRM, Product Related, Marketing, Campaigns, Program Control, Program Control	Define information about Marketing programs.
Trigger Schedules	RA_SCHEDULE	Set Up CRM, Product Related, Marketing, Campaigns, Trigger Schedules, Trigger Schedules	Define trigger schedules by setting up system schedules to check when to execute campaign triggers.

### Defining Objectives

To define marketing objectives, use the Marketing Objectives (RA\_UD\_CMPGN\_OBJ) component.

Access the Marketing Objectives page.

Marketing Objectives	
SetID	SHARE
Description	
SHARE	
Marketing Objectives <span style="float: right;">Customize   Find   View All   </span>	
First  1-9 of 9  Last	
*Objective Code	*Description
ACQU	Acquisition
AWAR	Awareness
CSEL	Cross Sell
EVNT	Events
INTR	Internal
LAUN	Product Launch
LOYA	Loyalty
PRES	Press and Analyst Relations
USEL	Up Sell

\* Required Field

Marketing Objectives page

Objective codes describe the goals of a campaign, a campaign activity, an offer, and, if you have purchased PeopleSoft Online Marketing, an online dialog. Objectives are associated with campaigns on the Program Detail page and with activities on the Activity Details page.

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

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

## Defining Campaign and Activity Statuses

To define campaign and activity statuses, use the Campaign and Activity Statuses (RA\_UD\_CMPGN\_STAT) component.

Access the Campaign and Activity Statuses page.

### Campaign and Activity Statuses

SetID	SHARE	Description	
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> <b>Campaign and Activity Statuses</b> <span style="margin-left: 20px;">Customize   Find   View All   </span> <span>First <span style="border: 1px solid gray; padding: 0 2px;">◀</span> 1-9 of 9 <span style="border: 1px solid gray; padding: 0 2px;">▶</span> Last</span> </div> </div>			
*Campaign Status	*Description		
Approved	Approved		
Archived	Archived		
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 (content, audiences, channels, and so on), send it for review, carry it out (if approved), complete it (unless you stop it prematurely), and archive it. At each stage in its life cycle, a campaign or activity has a status. You may also use status changes to drive workflow processes.

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

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

---

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

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

---

## Defining Status Rules

To define status rules, use the Status Rules (RA\_UD\_STAT\_CMB1) component.

Access the Status Rules page.

### Status Rules

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

SetID	SHARE	Description	SHARE
<b>Status Rules Detail</b>			
		Find   View All	First 1-25 of 69 Last
*Campaign Object Type	*Status Code From		*Status Code To
Campaign	APPR	Approved	EXEC
Campaign	APPR	Approved	IREV
Campaign	CMPL	Completed	IREV
Campaign	DCLN	Declined	IREV
Campaign	EXEC	Executing	CMPL
Campaign	EXEC	Executing	STOP
Campaign	IREV	In Review	APPR
Campaign	IREV	In Review	CMPL
Campaign	IREV	In Review	DCLN
Campaign	IREV	In Review	IREV
Campaign	NEW	New	IREV
Campaign	STOP	Stopped	EXEC
Campaign	STOP	Stopped	IREV
Campaign	TRIG	Trigger Approved	EXEC
Campaign	TRIG	Trigger Approved	STOP

Status Rules page (1 of 2)

Content	CMPL	Completed	EXPR	Expired
Content	IREV	In Review	CMPL	Completed
Content	IREV	In Review	PLAN	Planning
Content	IREV	In Review	RWRK	Re-Work
Content	NEW	New	PLAN	Planning
Content	PLAN	Planning	IREV	In Review
Content	RWRK	Re-Work	IREV	In Review
Offer	CMPL	Completed	ARCH	Archived
Offer	IREV	In Review	CMPL	Completed
Offer	IREV	In Review	DECL	Declined

\* Required Field

Status Rules page (2 of 2)

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

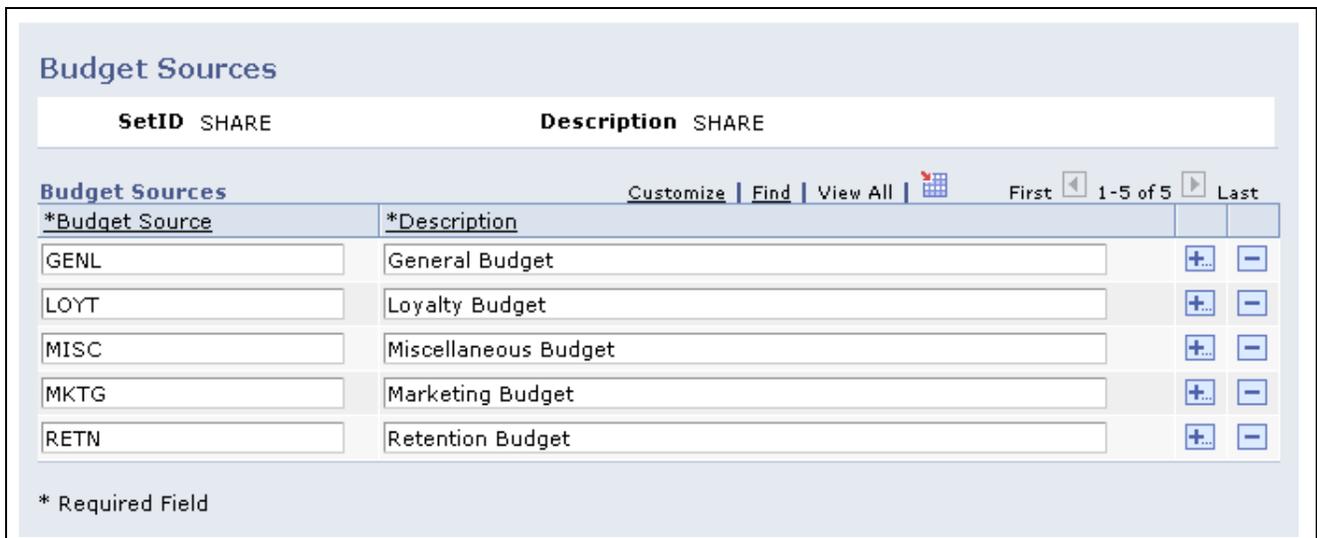
PeopleSoft delivers common status rules with your Enterprise Marketing system. You may add new rules as needed.

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

## Defining Budget Sources

To define budget sources, use the Budget Sources (RA\_UD\_BUDGT\_SRC) component.

Access the Budget Sources page.



Budget Sources page

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

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

## Defining Program Control

Access the Program Control page.

### Program Control

**Program Type** Campaign

#### Program Control Components

**Menu Name** RA\_CAMPAIGN\_MANAGEMENT

**Menu Bar Name** USE

**Item Name** RA\_CAMPAIGN\_DETAIL **Component:** RA\_CAMPAIGN\_DETAIL

**Transfer Page** RA\_CAMPAIGN\_DETAIL

**Transfer Mode** Update/Display

#### Control Details

**Program Image** PS\_CAMPAIGN\_ICN

**Activity Image** PS\_CAMPAIGN\_WAVE\_ICN

Program Control page

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

### Trigger Schedules

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

**Schedule ID** DAILY

#### Schedule

<p><b>*Description</b> <input type="text" value="Daily"/></p> <p><b>Comment</b> <input type="text" value="Daily"/></p> <p><b>Frequency</b> <input type="text" value="Daily"/></p> <p><b>Month of the Year</b></p> <p><b>Day of the Week</b></p> <p><b>Day of the Month</b>      <input type="checkbox"/> Last Day of the Month</p>	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">Days of the Week</th> <th colspan="2" style="text-align: left; border-bottom: 1px solid black;">Months</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Monday</td> <td><input type="checkbox"/> January</td> <td><input type="checkbox"/> July</td> </tr> <tr> <td><input checked="" type="checkbox"/> Tuesday</td> <td><input type="checkbox"/> February</td> <td><input type="checkbox"/> August</td> </tr> <tr> <td><input checked="" type="checkbox"/> Wednesday</td> <td><input type="checkbox"/> March</td> <td><input type="checkbox"/> September</td> </tr> <tr> <td><input checked="" type="checkbox"/> Thursday</td> <td><input type="checkbox"/> April</td> <td><input type="checkbox"/> October</td> </tr> <tr> <td><input checked="" type="checkbox"/> Friday</td> <td><input type="checkbox"/> May</td> <td><input type="checkbox"/> November</td> </tr> <tr> <td><input checked="" type="checkbox"/> Saturday</td> <td><input type="checkbox"/> June</td> <td><input type="checkbox"/> December</td> </tr> <tr> <td><input checked="" type="checkbox"/> Sunday</td> <td></td> <td></td> </tr> </tbody> </table>	Days of the Week	Months		<input checked="" type="checkbox"/> Monday	<input type="checkbox"/> January	<input type="checkbox"/> July	<input checked="" type="checkbox"/> Tuesday	<input type="checkbox"/> February	<input type="checkbox"/> August	<input checked="" type="checkbox"/> Wednesday	<input type="checkbox"/> March	<input type="checkbox"/> September	<input checked="" type="checkbox"/> Thursday	<input type="checkbox"/> April	<input type="checkbox"/> October	<input checked="" type="checkbox"/> Friday	<input type="checkbox"/> May	<input type="checkbox"/> November	<input checked="" type="checkbox"/> Saturday	<input type="checkbox"/> June	<input type="checkbox"/> December	<input checked="" type="checkbox"/> Sunday		
Days of the Week	Months																								
<input checked="" type="checkbox"/> Monday	<input type="checkbox"/> January	<input type="checkbox"/> July																							
<input checked="" type="checkbox"/> Tuesday	<input type="checkbox"/> February	<input type="checkbox"/> August																							
<input checked="" type="checkbox"/> Wednesday	<input type="checkbox"/> March	<input type="checkbox"/> September																							
<input checked="" type="checkbox"/> Thursday	<input type="checkbox"/> April	<input type="checkbox"/> October																							
<input checked="" type="checkbox"/> Friday	<input type="checkbox"/> May	<input type="checkbox"/> November																							
<input checked="" type="checkbox"/> Saturday	<input type="checkbox"/> June	<input type="checkbox"/> December																							
<input checked="" type="checkbox"/> Sunday																									

\* 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 executing campaign triggers. Values are:

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

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

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

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

---

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

---

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

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

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

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

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

---

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

---

<b>Month of the Year</b>	Select the month when the system is to check campaign conditions every year. This field is editable only when you select <i>Annually</i> in the Frequency field.
<b>Day of Week</b>	Select the day of the week when the system is to check campaign conditions. This field is available only when you select <i>Weekly</i> in the Frequency field.
<b>Day of the Month</b>	Select the day of the month when the system is to check campaign conditions. This field is editable only when you select either <i>Monthly</i> or <i>Annually</i> in the Frequency field.
<b>Last Day of the Month</b>	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.
<b>Days of the Week</b>	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.
<b>Months</b>	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

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

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

## Pages Used to Define Channel Elements

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

## Defining Channel Activities

To define channel activities, use the Channel Activities (RA\_UD\_ACTIVITY) component.

Access the Channel Activities page.

**Channel Activities**

SetID SHARE      Description SHARE

**Activities**      Customize | Find | View All |      First ◀ 1-6 of 6 ▶ Last

*Activity Code	*Description		
BCST	Broadcast	+...	-
DRCT	Direct	+...	-
EVNT	Event	+...	-
INBD	In Bound	+...	-
INTR	Internal	+...	-
PRNT	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.

**Marketing Channels**

SetID SHARE      Description SHARE

Activity DRCT      Description Direct

**Marketing Channels**      Find | View All |      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	Telemarketing	Telemarketing	+...	-

\* Required Field

Marketing Channels page

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

- Channel ID** Enter a code that identifies the marketing channel.
- Marketing Channel** Enter a description of the marketing channel. This description appears when the marketing channel is selected on the Campaign - Activities detail page.
- Channel Execution** Channel execution indicators drive the behavior of an activity once it is set to *Executing* (EXEC) status. Select a channel execution method. Values are:
  - Mail Correspondence*: Select to execute the marketing activity through direct mail. This method enables the user to use Correspondence Management to generate document merges.
  - Order Capture*: Select to indicate that campaign activity is intended for internal use by the PeopleSoft Order Capture application. The result of this is that customers defined in the audience associated with this campaign activity are potentially eligible for upsell or cross-sell promotions.
  - Sales Force*: Select to indicate that the execution channel for the campaign activity is sales. Once the campaign activity is set to *Executing*, the audience associated with the campaign activity is pushed to the PeopleSoft Sales application as a group of sales leads.
  - Telemarketing*: Select to execute the marketing activity through PeopleSoft Telemarketing. Once an activity is set to *Executing*, the audience associated with the campaign activity is pushed to the PeopleSoft Telemarketing application as a group of telemarketing leads.
  - Advisor/Cross Sell*: Allows for execution of marketing activities in cross-sell situations.

---

**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.

**Channels**

<b>SetID</b>	SHARE	<b>Description</b>	SHARE
<b>Activity</b>	BCST	<b>Description</b>	Broadcast
<b>Marketing Channel</b>	RADI	<b>Description</b>	Radio Stations

**Channel Details** Customize | Find | View All | First  Last

*Channel Detail	*Description		
<input type="text" value="CBS"/>	<input type="text" value="CBS Radio"/>	+..	-..
<input type="text" value="WGN"/>	<input type="text" value="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.

<b>Channel Detail</b>	Enter a code that identifies the channel.
<b>Description</b>	Enter a description of the specific media outlet.

**See Also**

Chapter 9, “Creating Campaigns and Activities,” Defining Activities, page 141

---

## Defining Content Elements

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

This section discusses how to:

- Define content types.
- Define content subtypes.

---

**Note.** Content type and content subtype are included for reporting organizational purposes and are fully modifiable: there are no system requirements for the codes, so you can define them as you wish.

---

### Pages Used to Define Content Elements

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

### Defining Content Types

To define content types, use the Content Types (RA\_UD\_CONT\_TYPE) component.

Access the Content Types page.

Content Types			
SetID	SHARE	Description	SHARE
<b>Content Types</b>		Customize   Find   View All	First ◀ 1-9 of 9 ▶ Last
*Content Type	*Description		
CREA	Creative		
CTY	County Fair		
DELV	Deliverable		
DRCT	Direct Marketing		
EVNT	Event		
PRES	Press/Analyst		
PUBL	Publishing		
TOOL	Sales Tools		
WEB	Web		

\* Required Field

Content Types page

Use content types to define broad categories of content.

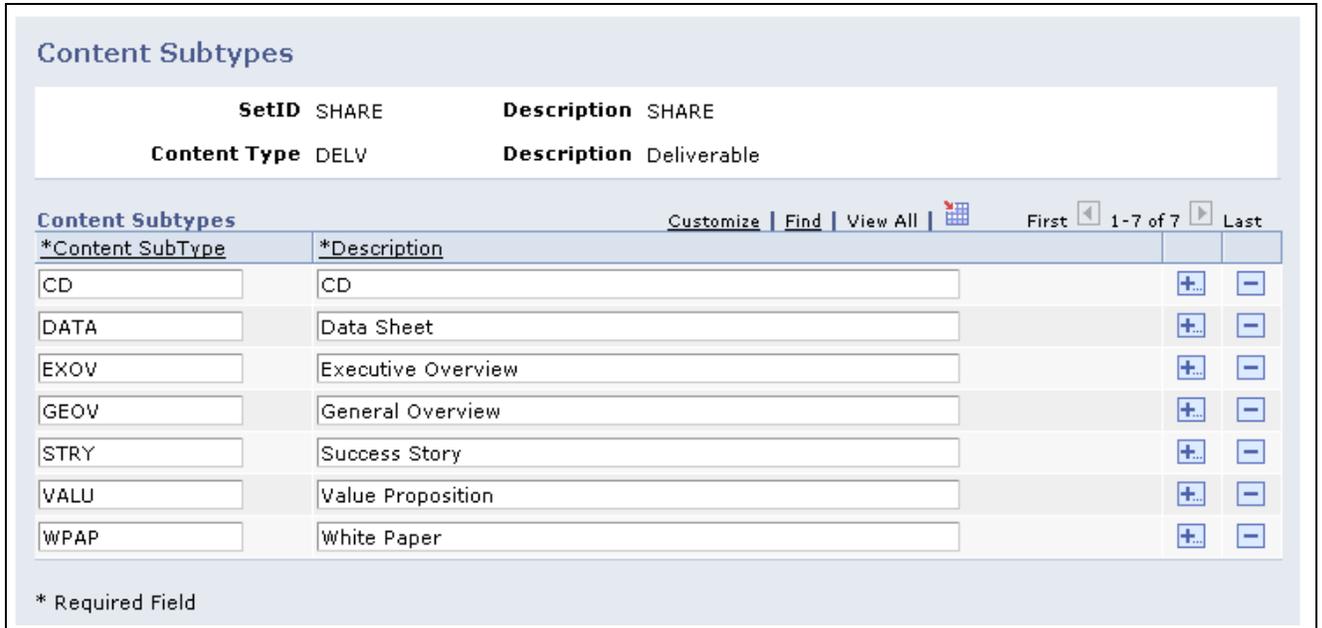
**Content Type** Enter a code that identifies the content type.

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

## Defining Content Subtypes

To define content subtypes, use the Content Subtypes (RA\_UD\_CNT\_STYPE) component.

Access the Content Subtypes page.



Content Subtypes page

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

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

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

## Defining Offer Options

This section discusses how to:

- Define offer context.
- Define offer options.

To set define offer options, use the RA\_OFFER\_OPTIONS component.

### Pages Used to Define Offer Options

Page Name	Object 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.
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

Access the Offer Context page.

Context Id		
1	Case	+ -
2	Order Capture CI	+ -
3	360-Degree View	+ -

Offer Context page

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

## Defining Offer Options

Access the Offer Options page.

**Third Party Optimization**

Offer Options page

**Third Party Optimization** Select if you will be using 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.

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

Enterprise Marketing is delivered with the following predefined metrics:

<b>Metric Name</b>	<b>Description</b>	<b>Unit of Measure</b>
Contact Rates – Telemarketing	Campaign activity level	Percentage
Conversion Rates – Telemarketing	Campaign activity level	Percentage
Cost	Campaign activity level	Currency amount
Cost	Campaign level	Currency amount
Cost	Rollup level	Currency amount
Cost per Lead	Campaign activity level	Currency amount
Cost per Lead	Campaign level	Currency amount
Cost per Lead	Rollup level	Currency amount
Cost per Quote	Campaign activity level	Currency amount
Cost per Quote	Campaign level	Currency amount
Cost per Quote	Rollup level	Currency amount
Do Not Call Rate – Telemarketing	Campaign activity level	Percentage
“Do Not Contact” Responses	Rollup level	Count
Lead to Quote ratio	Campaign activity level	Percentage
Lead to Quote ratio	Campaign level	Percentage

<b>Metric Name</b>	<b>Description</b>	<b>Unit of Measure</b>
Lead to Quote ratio	Rollup level	Percentage
Number of Leads	Campaign activity level	Count
Number of Leads	Campaign level	Count
Number of Leads	Rollup level	Count
Number of Opportunities	Campaign activity level	Count
Number of Opportunities	Campaign level	Count
Number of Opportunities	Rollup level	Count
Number of Quotes	Campaign activity level	Count
Number of Quotes	Campaign level	Count
Number of Quotes	Rollup level	Count
Number of Responses	Campaign activity level	Count
Number of Responses	Campaign level	Count
Number of Responses	Rollup level	Count
Opportunity Rate – Telemarketing	Campaign activity level	Percentage
Opportunity to Quote ratio	Campaign activity level	Percentage
Opportunity to Quote ratio	Campaign level	Percentage
Opportunity to Quote ratio	Rollup level	Percentage
Order Revenue	Campaign activity level	Currency amount
Order Revenue	Campaign level	Currency amount

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

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

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

See [Chapter 9, “Creating Campaigns and Activities,” Define a Trigger, page 147](#); [Chapter 9, “Creating Campaigns and Activities,” Measuring Campaign Effectiveness, page 157](#); [Chapter 7, “Using Audiences,” Associating Costs with an Audience or Segment, page 105](#); [Chapter 9, “Creating Campaigns and Activities,” Defining Activities, page 141](#) and [Chapter 5, “Creating Campaign Content,” Entering the Costs of Creating Content, page 65](#).

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

## Pages Used to Define and Create Metrics

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

## Defining Metric Types

To define metric types, use the Metric Types (RA\_UD\_MET\_TYPE) component.

Access the Metric Types page.

**Metric Types**

SetID SHARE Description SHARE

Metric Types Customize | Find | View All | First 1-3 of 3 Last

*Metric Type	*Description		
CMPG	Campaign Level	+	-
RLUP	Rollup Level	+	-
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.

**Metric Subtypes**

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

**Metric Type** CMPG      **Description** Campaign Level

**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.

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.

**Metrics detail**

**Performance Metric Detail**

**SetID** SHARE **Metric ID** MET0000113

**Detail**

**\*Name**

**\*Metric Type**

**\*Metric Sub Type**

**Unit Of Measure**

**Description**

**SQL Identifier**

**\*Active Status**

```
SELECT %DecDiv(SUM(A.COST) , SUM(A.LEAD_COUNT)) FROM ( SELECT
BUSINESS_UNIT , RA_CAMPAGN_ID , RA_CMPGN_WAVE_ID , 0 LEAD_COUNT ,
SUM(RA_ACTUAL_AMT) COST FROM PS_RA_ACT_COST_VW GROUP BY
BUSINESS_UNIT , RA_CAMPAGN_ID , RA_CMPGN_WAVE_ID UNION SELECT
BUSINESS_UNIT , RA_CAMPAGN_ID , RA_CMPGN_WAVE_ID , SUM
(RA_ACTUAL_AMT) , 0 FROM PS_RA_LEADS_VW GROUP BY BUSINESS_UNIT ,
RA_CAMPAGN_ID , RA_CMPGN_WAVE_ID ) A WHERE A.BUSINESS_UNIT = :1
AND A.RA_CAMPAGN_ID = :2 HAVING SUM(A.LEAD_COUNT) > 0
```

Performance Metric Detail page

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

To create custom metrics, you must first define the accompanying SQL objects and statements using PeopleSoft Application Designer. SQL objects designed to govern PeopleSoft Enterprise 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.

<b>Metric Type</b>	Select the type of object to be analyzed: <ul style="list-style-type: none"> <li>• <i>CMPG</i> — <i>Campaign</i></li> <li>• <i>WAVE</i> — <i>Activity</i></li> <li>• <i>RLUP</i> — <i>Campaign Rollup</i></li> </ul>
<b>Metric Sub Type</b>	Define the nature of the analysis: <ul style="list-style-type: none"> <li>• <i>Performance</i></li> <li>• <i>Financial</i></li> </ul>
<b>SQL Identifier</b> (Structured Query Language identifier)	Select a unique identifier of the SQL object that contains the SQL statement that governs the metric's calculations.
<b>Active Status</b>	Select the metric's status: <i>Active</i> or <i>Inactive</i> .
<b>SQL Stmt Text</b> (Structured Query Language statement text)	Displays the SQL statement that governs the metric's calculations.

---

## Defining Cost Elements

This section discusses how to:

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

### Pages Used to Define Cost Elements

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

### Defining Cost Types

To define cost types, use the Cost Types (RA\_UD\_COST\_TYPE) component.

Access the Cost Types page.

### Cost Types

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

**Cost Types** Customize | Find | View All |

First ◀ 1-6 of 6 ▶ Last

<u>*Cost Type ID</u>	<u>*Description</u>		
ADMN	Administrative	+	-
ANLY	Analysis	+	-
CHNL	Channel	+	-
CONT	Content	+	-
FULL	Fulfillment	+	-
LIST	List	+	-

\* 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.

**Record Costs**

SetID SHARE                      Description SHARE

---

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

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

\* Required Field

Record Costs page

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

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

---

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

---

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

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

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

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

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

## Defining Channel Costs

To define channel costs, use the Channel Cost (RA\_CHANNEL\_COST) component.

Access the Channel Cost page.

**Channel Cost**

<b>SetID</b> SHARE	<b>Description</b> SHARE
<b>Activity</b> BCST	<b>Description</b> Broadcast
<b>Marketing Channel</b> TV	<b>Description</b> Television Stations
<b>Channel Detail</b> ABC	<b>Description</b> ABC

**Record Costs**

*Cost Type	Variable	Unit Cost	Forecast Value	Actual Value
Maintenance	Variable			

\* 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, and set up segment groups.

## Page Used to Define Audience Information

Page Name	Object Name	Navigation	Usage
Audience Setup	RA_LIST_CONFIG	Set Up CRM, Product Related, Marketing, 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.

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.

**Setup Saved Search Audience**

Search Refresh Add Personalize

**Component** RD\_PERSON\_SEARCH  
**Page** RD\_PRSN\_SRCH\_SEC  
**Market** Global  
**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

Setup Saved Search Audience 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	

Modify System Data

This object is maintained by PeopleSoft.

Setup Saved Search Audience page (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.

<b>Enabled Marketing/Dialog Roles</b>	Displays the Marketing/Dialog target individual roles (role/relationship) that can be extracted from the configurable search results to make up an audience list.
<b>Override Search Record</b>	(Optional) Select an alternate search record containing identical fields to the primary search record, plus any additional fields for mapping to a target type. This search record could be a view that provides additional constraints or joins to affect the search results for the audience.
<b>Field Mappings</b>	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.

Define Segment Group page

<b>Segment Group ID</b>	Enter the unique identifier for the segment group. If you do not enter an identifier (leaving the default value of NEXT) then a group ID will be generated automatically.
<b>Segment Group</b>	Enter a name for the segment group.
<b>Status</b>	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 Enterprise Marketing, tasks are associated with campaigns, content, and offers, and are assigned to appropriate team members as a reminder to do a certain thing at a certain time. When a task is assigned to a campaign team member, a notification is added to 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	Object Name	Navigation	Usage
Task Shells	RA_TASK_SHELL	Set Up CRM, Product Related, Marketing, Task Shell, Task Shell	Define task shells.
Task Sets	RA_TASK_GROUP	Set Up CRM, Product Related, Marketing, Task Sets	Define task sets.

## Defining Task Shells

To define task shells, use the Task Shell (RA\_TASK\_SHELL) component.

Access the Task Shell page.

**Task Shell**

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

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

<b>Description</b>	Enter a description of the task shell.
<b>Priority</b>	Select a priority value for the task shell. The priority value indicates the urgency of the task shell for information purposes only. Options are <i>High</i> , <i>Medium</i> , or <i>Low</i> .
<b>Status</b>	Select a status for the task. Options are <i>Active</i> and <i>Inactive</i> .

## Defining Task Sets

To define task sets, use the Task Sets (RA\_TASK\_GROUP) component.

Access the Task Sets page.

**Task Sets**

This page is for creating task sets.

**Group Type** Campaign

**Task Sets**

\*Name Evaluate ROI Status Active

Task Shell ID	
Create Metrics	Delete
Create New Task	Delete
Review Metrics	Delete

Add Shell

\* Required Field

Task Sets page

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

<b>Name</b>	Enter a name for the task set.
<b>Task Shell ID</b>	Select the name of a task shell that you want to include in the task set. Add and delete additional task shells as needed.

## Defining Telemarketing Elements

This section discusses how to:

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

## Pages Used to Define Telemarketing Elements

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

## Defining Telemarketing Fulfillments

To define telemarketing fulfillments, use the Fulfillments (RT\_MGR\_MANAGE\_FFL) component.

Access the Fulfillments page.

**Fulfillments**

SetID SHARE

**Fulfillments**

\*Fulfillment ID: BROCHURE      \*Status: Active

\*Description: Brochure      Product Description

Product: [ ]      [ ]

Long Description: Company Brochure

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 telemarketing call, prospects may request collateral materials related to the products offered. Call outcome selections of *Send Collateral by Mail* or *Send Collateral by Email* require that you also specify the collateral requested. When the telemarketing agent closes the call, a worklist item is sent to a fulfillment agent.

## Defining Telemarketing User Dispositions

To define telemarketing user dispositions, use the User Disposition (RT\_USR\_DISPOSTN) component.

Access the User Dispositions page.

User Dispositions						
SetID 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	10/03/2002 5:14PM	SAMPLE	+	-
Generate a Lead	COOL	Cool Customer Lead	10/03/2002 5:14PM	SAMPLE	+	-
Generate a Lead	HOT	Hot Customer Lead	10/03/2002 5:14PM	SAMPLE	+	-
Not Interested	HAVE	Already Has Similar Product	10/03/2002 5:14PM	SAMPLE	+	-
Not Interested	NEED	No Perceived Interest	10/03/2002 5:14PM	SAMPLE	+	-
Send Collateral by Ema	SNDE	Do not email	10/03/2002 5:14PM	SAMPLE	+	-
Send Collateral by Mail	SNDM	Do not mail	10/03/2002 5:14PM	SAMPLE	+	-

\* Required Field

User Dispositions page

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

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

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

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

## Incorporating an Automatic Transfer Function into PeopleSoft Telemarketing Scripts

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*.



## CHAPTER 5

# Creating Campaign Content

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

---

## Understanding Campaign Content

This section discusses:

- Content types and subtypes.
- Content statuses.

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

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

Examples of campaign content include the following:

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

## Content Types and Subtypes

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

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

<b>Content Type</b>	<b>Content Subtype</b>
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
Event	Scripted Presentation

Content Type	Content Subtype
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

## Content Statuses

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

The following table shows content statuses:

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

---

## Managing Content

In this section, we list common elements and discuss:

- Adding or editing a content definition.
- Defining content.
- Associating collateral files with content.
- Associating tasks with content.
- Entering the costs of creating content.
- Viewing, adding, and emailing content notes.

### Common Elements for This Section

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

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

## Pages Used to Manage Content

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

## Adding or Editing a Content Definition

Access the Manage Content page.

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

## Defining Content

Access the Manage Content - Content Details page.

Manage Content - Content Details page

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

## Associating Collateral Files with Content

Access the Manage Content - Collateral page.

**Manage Content**

Save Add Refresh Search Previous Next Personalize

**Setid** SHARE **Content ID** CON0000104

**Content** MMA Content - TV AD Press Rel

Content Details Collateral Task Costs Notes

**Attach Collateral** 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

Add Collateral

Save Add Refresh Search Previous Next Top of Page

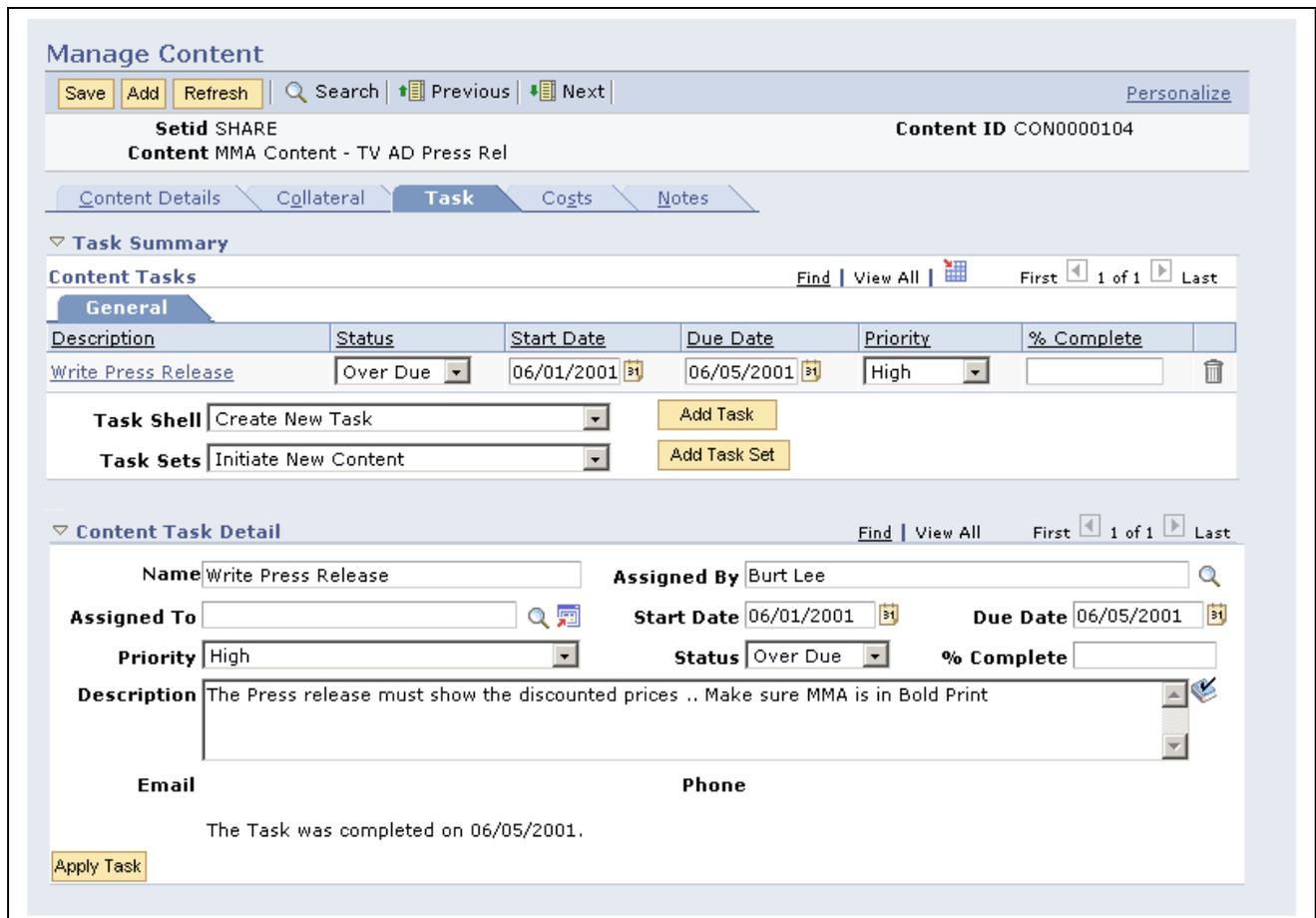
Manage Content - Collateral page

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

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

## Associating Tasks with Content

Access the Manage Content - Task page.



Manage Content - Task page

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

- Task Shell** Select a task shell from the available options.
- Task Sets** Select a task set from the available options.
- Add Task** Click to add a new task.
- Add Task Set** Click to add a new task set.
- Name** Displays the name of the task or task set
- Assigned By** 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 Chapter 4, “Setting Up PeopleSoft Enterprise Marketing and Telemarketing,” Defining Task Tools, page 51.

## Entering the Costs of Creating Content

Access the Manage Content - Costs page.

**Manage Content**

Save Add Content Refresh Search Previous Next Personalize

Setid SHARE Content ID CON0000104  
Content MMA Content - TV AD Press Rel

Content Details Collateral Task **Costs** Notes

**Record Costs** Find First 1 of 1 Last

*Cost Description	Components	Variable	Unit Cost	Forecast Value	Actual Value	
Creative	Content	Fixed		1000.00	1000.00	Delete

Add Content Cost Totals 1000.00 1000.00 Calculate

\* Required Field

Save Add Content Refresh Search Previous Next Top of Page

Manage Content – Costs page

**Cost Description** Select the description of the cost that you want to associate with the content. 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 content’s cost is defined as variable or fixed.

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

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

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

## Viewing, Adding, and Emailing Content Notes

Access the Manage Content - Notes page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.



# CHAPTER 6

## Using Offers

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

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### Understanding Offers

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

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

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.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Interactions and 360-Degree Views”.

### 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.

Status	Description
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 Enterprise Marketing and Telemarketing,” 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 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: for example, for the icon to appear in the 360-Degree View toolbar, a policy must be configured using the action “Display Offer Icon in 360,” and for it to appear in the Case toolbar, a policy must be configured using the action “Upsell Configuration on Case.” Order Capture does not require an AAF policy to display the icon on the Order Capture page.

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**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 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, 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 available if a third-party optimization engine is installed.

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

See *PeopleSoft Enterprise CRM 9 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.

See *PeopleSoft Enterprise CRM 9 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

Page Name	Object Name	Navigation	Usage
Manage Offers	RA_OFFER_DETAIL1	Marketing, Manage Offers, Offer	Define attributes that make up a campaign offer.
Create Price Rule - Select products, partners and discount	RA_PRICESET_PG	<ul style="list-style-type: none"> <li>• Click the Add Price Rule link on the Offer page when creating a new offer.</li> <li>• Click the Update products and price rule link on the Offer page when editing an existing offer.</li> </ul>	Specify the type of discount structure that applies to the offer and the products offered.
Create Price Rule - Define Price Breaks	RA_PRICE_BREAK	Click the Next button on the Create Price Rule - Select products, partners and discount page.	Define the discount structure of the offer.
Create Price Rule - Review and Save	RA_PRICE_BREAK3	Click the Next button on the Create Price Rule - Define Price Breaks page.	Confirm price rule selections before saving the definition.
Note	RA_OFFER_NOTE	Marketing, Manage Offers, Note	Write notes and attach them to offers.

### Defining an Offer

Access the Manage Offers page.

### Manage Offers

**Offer** BUY BIKING SHORTS AND GET BIKING GLOVES FREE
 
**Status** New  
**Start Date** 02/01/2002 **End Date** 12/31/2005

#### Offer Details

**\* Offer** BUY BIKING SHORTS AND GET BIKING GLOVES FREE
 **Type** Promotional Discount

**\* Status** 
**Owner**

**Objective** 
**\* Start Date** 02/01/2002  **\* End Date** 12/31/2005

**Priority** 
**Control %**

**Internal Description**

---

**Price Rule**

**Summary** BUY BIKING SHORTS AND GET BIKING GLOVES FREE
 **Price Rule** A020000103

**Discount** Giveaway

**Product Selection**

Description	List Price
Switchback Mt. Biking Shorts,	US010->EA-49, US011->EA-85

Manage Offers page (page 1 of 2)

#### Discount Detail

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

#### Presentation

**Display Message**

**Script Type**

**Marketing Channels**

*Channel Execution	
<input type="text" value="Telemarketing"/>	<input type="button" value=""/>
<input type="text" value="Order Capture"/>	<input type="button" value=""/>
<input type="text" value="Mail Correspondence"/>	<input type="button" value=""/>
<input type="text" value="Sales Force"/>	<input type="button" value=""/>
<input type="text" value="Cross Sell"/>	<input type="button" value=""/>

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

#### Audit History

\* Required Field

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.

<b>Type</b>	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.
<b>Status</b>	Enter the position of the offer in its life cycle
<b>Owner</b>	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.
<b>Objective</b>	Select an objective for the offer.
<b>Priority</b>	Select a priority for the offer.
<b>Control %</b>	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).
<b>Start Date and End Date</b>	Enter the start and end dates that the offer is valid.
<b>Internal Description</b>	Enter a description of the offer that will only be viewed by internal personnel—the offer recipient will not see this description.
<b>Price Rule</b>	<i>(Promotional Discount offer only)</i> Displays information about the products and price rule for the offer.
<b>Discount Detail</b>	<i>(Promotional Discount offer only)</i> Displays information about the discount associated with the offer.
<b>Update Products and Price Rule</b>	<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/> <b>Note.</b> You cannot access the Create Price Rule wizard when the offer’s Status is Complete or Archived. <hr/>
<b>Display Message</b>	Enter a description of the offer that will be visible to the offer recipient.
<b>Script Type</b>	Select whether the script type is an Advisor dialog or a branch script.
<b>Script Name</b>	Select the name of the Advisor dialog or branch script you specified. This field appears when you select a Script Type.
<b>Marketing Channels</b>	Select a channel from the drop-down list.  The available options vary depending on the offer type. For Promotional Discount, the choices are Telemarketing, Order Capture, Mail Correspondence, Sales Force, and Cross Sell. For Communication, the choices are Mail Correspondence and Cross Sell.
<b>Add Channels</b>	Click to specify marketing channels to add to the Marketing Channels list.
<b>Add All Channels</b>	Click to add all available marketing channels to the list.
<b>Transaction Context</b>	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:

- 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.

**Create Price Rule**

1 2 3

**Step 1 : Select products, partners and discount**

**Discount Type** Giveaway

**Product** Find | 1 of 1 | First | Last

*Description	List Price
Switchback Mt. Biking Shorts,	US010->EA-49, US011->EA-85

Add Product

**Partners** Customize | Find | View All | 1 of 1 | First | Last

Partner Company

Add Partner

Next >> [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.

<b>Product ID</b>	Select the ID of the offered product.
<b>Description</b>	Displays the description of the selected product.
<b>List Price</b>	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.
<b>Partner Company</b>	( <i>Optional</i> ) Select the name of a partner company if you want to create a Price Rule keyed by Partner ID.

## Defining Quantity Breaks and Price Adjustments

Access the Create Price Rule - Define Price Breaks page.

**Create Price Rule**

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 Rule - Define Price Breaks page

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

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

---

<b>Unit of Measure</b>	Select the unit of measure you want to use for the offered product.
<b>Low Quantity</b>	Enter the minimum quantity of product to qualify for the promotional discount.
<b>Upper Quantity</b>	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.

<b>Adjustment Type</b>	Select the type of discount that you want to apply to the product price. Type options are: <i>Amount:</i> Select the amount option to deduct a fixed currency amount from the final product price. <i>Percent:</i> Select the percent option to calculate and deduct a percent amount from the final product price.
<b>Percent</b>	Enter a percent amount that you want deducted from the final product price when you select a Percent type.
<b>Amount</b>	Enter the currency amount that you want deducted from the final product price when you select an Amount type.
<b>Currency Code</b>	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.

<b>Description</b>	Select the Promotional Product ID number of the product you are giving away as the promotional item.
<b>Unit of Measure (Promotion)</b>	Select the unit of measure used for the promotional product.
<b>Quantity</b>	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 <i>Box</i> as the Unit of Measure (promo prod) and <i>1</i> as the Quantity.

## Reviewing and Saving Your Price Rule Definition

Access the Create Price Rule - Review and Save page.

**Create Price Rule**

1 2 3

**Step 3 : Review and Save**

**Product Selection** Customize | Find |  First  1 of 1  Last

Description	List Price
Switchback Mt. Biking Shorts,	US010->EA-49, US011->EA-85

**Partners** Customize | Find |  First  1 of 1  Last

Partner Company

**Price Breaks** Customize | Find |  First  1 of 1  Last

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

[Return to Manage Offers](#)

Create Price Rule - Define Price Breaks 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 74](#)

## Attaching Notes to Offers

Access the Offers - Note page.

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

See *PeopleSoft Enterprise CRM 9 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

Page Name	Object Name	Navigation	Usage
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.

**Present Offer**

**Offers** Find | View All | First ◀ 1-3 of 3 ▶ Last

Offer Name	Score	Expiration Date	Script
FREEZER VOLUME DISCOUNT 10%	90.00	10/31/2009	
<a href="#">Customer Appreciation Offer</a>	90.00	12/31/2008	
<a href="#">Air Conditioning CU Offer</a>	90.00	12/31/2008	

**Offer Details**

▼ **Message**

FREEZER VOLUME DISCOUNT 10%

▼ **Discount Detail** Find | View All | First ◀ 1 of 1 ▶ Last

Unit of Measure	Low Quantity	Upper Quantity	Adjustment Type	Percent	Amount	Currency Code
Each	1.0000	99999.0000	Percent	10.00		

▼ **Products Offered** Find | View All | First ◀ 1-2 of 2 ▶ Last

Quantity	UOM	Description	List Price	Currency
<input type="text"/>	Each	7.2 cu. Ft. Chest Freezer Flas	1388.8800	US Dollar
<input type="text"/>	Each	22.8 cu. Ft. Chest Freezer Man	1388.8800	US Dollar

[Return to Previous Page](#)

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.

---

### Understanding Audiences

This section discusses:

- Audiences
- Segments
- Audience statuses
- Audience sources
- Audience types

#### Audiences

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

Every marketing campaign requires one or more target audiences. These target audiences can be current customers drawn from your own database, unknown prospects from a rented list, or respondents to a banner ad on a 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 Telemarketing, Online Marketing, or Sales applications, or will you use a third-party direct mail vendor?

- Do you want the audience to reflect changes to the database each time 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 go 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, it is important that you carefully consider changes to an existing audience so that you don't adversely affect another campaign. For this reason, PeopleSoft Marketing provides the ability to clone audiences.

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## 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:

<b>Audience Status</b>	<b>Description</b>
<i>In Design</i>	Audience is new and selection criteria is not yet defined.
<i>Designed</i>	At least some audience selection criteria is 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 completed successfully.
<i>Approved</i>	Audience is approved for use in live campaigns.

Audience Status	Description
<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 only be changed 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). Internal audiences are generated by selecting records from your PeopleSoft CRM database. These records may be existing customers, or a list imported from an outside source. In either case, the audience is drawn from the database.

External audiences are unknown contacts that do not exist in your database. Two common examples of 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.

There are nine sources of audiences:

Audience Source	Description
<i>External</i>	<p>An <i>External</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>	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.
<i>Internal Using Combine Audiences</i>	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.
<i>Internal Using Import</i>	A contact list is imported into your PeopleSoft CRM database, from which you generate an internal (known) audience.

Audience Source	Description
<i>Internal Using PSQuery</i>	This query uses PSQuery functionality to create an audience from contacts currently in the PeopleSoft Marketing system. Using PSQuery requires a knowledge of SQL.
<i>Internal Using Saved Search</i>	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 gives you the option of saving the search as an audience.  <b>Note.</b> 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.
<i>Control Group</i>	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.  <b>Note.</b> 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.
<i>Test Audience</i>	A test audience is created by selecting a subset of a generated audience. Use test audiences to try different offers on different subsets of your audience. These test audiences can be created as a percentage of the original audience count, or users can specify the total number of records for each test audience. Test audience selection is random. All test audiences are fixed audiences.  <b>Note.</b> You can create test audiences only for audiences in the status of generated, approved, or committed.
<i>Segment</i>	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.

**See Also**

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Query*

**Audience Types**

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

A fixed audience is an internal audience that does not change, such as the list of people who attended a 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>	The audience query runs only at the time the audience is created—results are static once 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.
<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.

## Using Audiences with the CRM/Student Administration Integration

Similar to CRM Sales, in which sales representatives want to keep their deals confidential, Student Administration users (recruiters and users who handle applications) want to view only those recruits or prospects that have been assigned to them. Audience generation allows you to limit access to prospects and applicants based on the user's role, by automatically appending a subquery to a generated audience that causes it to filter the results by the list of prospects or applicants a particular user has permission to see.

This functionality is active when data has been imported to CRM from Student Administration. This data is included in a CRM table with special security access. If such data exists in the CRM system, users who have been identified as Student Administration users are keyed to a table imported from Student Administration, such that these users will only be able to access prospects or recruits who have been assigned to them. When audiences are generated, a SQL subquery is appended to the audience-generation query, limiting the results of the query to only these prospects or recruits.

The filtering of audiences is determined by which application classes are defined in the CS\_AUDSECURITY application class set (Set Up CRM, Common Definitions, Component Configuration, Application Class Registry).

The audience generation process behaves differently depending on whether the generated audience is static or dynamic.



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**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.

---

<b>Owner</b>	Person who is responsible for an audience.
<b>Status</b>	Position of an audience in its life cycle. Values are <i>Approved, Archived, Committed, Designed, Generated, In Design, Processing, and Scheduled.</i>

## Pages Used to Create and Manage Audiences

Page Name	Object Name	Navigation	Usage
Audiences	RA_LIST_SUMMARY	Marketing, Manage Audiences	View summary information about all existing audiences or add a new audience.
Audience Details	RA_LIST_MAIN	<ul style="list-style-type: none"> <li>Click an audience name on the Audiences page to open an existing audience.</li> <li>Click the Create New Audience button on the Audiences page to define a new audience.</li> </ul>	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.
Define Segment Group	RA_SEGMENT_GROUP	<p>Set Up CRM, Product Related, Marketing, Audiences, Segment Groups</p> <p>or</p> <p>Click the Add New Segment Group button on the Segment Details page.</p>	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.

Page Name	Object Name	Navigation	Usage
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 or eliminate records from a generated audience.
Audiences - Correspondence	RA_LIST_CM	Marketing, Audiences, Correspondence	View summary information about audience correspondence and initiate new correspondence.
Team	RA_LIST_TEAM	Marketing, Manage Audiences, Team	Associate team members to an audience. You can associate individual workers or entire roles as team members—in the case of roles, each individual worker who has that role is considered a team member. Team membership can be used to control or limit who can access this audience/segment.  <b>Note.</b> 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.

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

Audiences are created using profiles. For a complete explanation of profiles, 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 *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*.

## Creating an Audience

Access the Audience Details page.

**Audience**

Save | Add | Search | Refresh | Clone

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

**Audience Definition**

\*Audience Name  \*Status

\*Audience Source  \*Type

Owner Name  Last Updated 05/03/2005 10:15AM

Description

Published

**Audience Information**

**Selection Criteria** No selection criteria has been defined.

Define Selection Criteria

**Audience/Count Generation**

Date Last Generated  Count 0

Generate Audience/Count  None  Date    Time

Now

Audience Generation Log

Clone Audience

Audience Details page

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

## Audience Details Page Header

<b>Audience Name</b>	Enter a descriptive name for the audience. This field is display-only once the audience is saved.
<b>Source</b>	Indicates from where an audience is drawn and how it was selected. Values are <i>Control Group</i> , <i>External</i> , <i>Internal Using Audience Builder</i> , <i>Internal Using Combine Audiences</i> , <i>Internal Using Import</i> , <i>Internal Using PSQuery</i> , <i>Test Audience</i> , and <i>Internal Using Saved Search</i> .
	<hr/> <b>Note.</b> You cannot change the source type of an audience once you have created it. <hr/>
	<hr/> <b>Note.</b> The values <i>Control Group</i> , <i>Test Audience</i> , and <i>Internal Using Saved Search</i> 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 once the audience has been created. <hr/>
<b>Published</b>	Select this check box to indicate that you want the audience or segment to be visible and available to users outside the CRM Marketing application, such as the AAF Library or the Strategic Account Planning application.

## Audience/Count Generation

<b>Date Last Generated</b>	Displays the date and time when the audience was last generated successfully.
<b>Generate Audience/Count</b>	Select when you want the audience to generate.
<b>None</b>	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.
<b>Date and Time</b>	Select to specify a date and time for the audience to generate.
<b>Now</b>	Select to generate the audience as soon as you save the changes.
<b>Log</b>	Displays information about generated audiences. For each effort to generate an audience, the log includes the date and time, the outcome of the effort, and the number of records (people) placed on the audience.

## Generating an Audience Using Audience Builder

Access the Create a Target Audience - Select Roles page.

---

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

---

**Create a Target Audience**

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

[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), or a *Worker* (an employee of a company). It is possible for someone to 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 may select more than one to include all eligible records.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*.

### Defining Selection Criteria

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

**Create a Target Audience**

1 2 3

**Step 2: Define Selection Criteria**

[Switch to Advanced Mode](#)

**Selection Criteria**

And/Or	Profile Field	Operator	Value
	Individuals.People.SetID	is equal to	CRM01
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 >>

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. In other words, each individual condition must be met for the combined (parenthetical) condition to be met. Because the parentheses are applied based on simple rules, it is important that you carefully consider the expected results of your query.

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

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

<i>And/Or</i>	<i>Profile Field</i>	<i>Operator</i>	<i>Value</i>
	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:

<b>And/Or</b>	<b>Profile Field</b>	<b>Operator</b>	<b>Value</b>
	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 Application Fundamentals documentation for more information about how profiles are defined.

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

**Operator**

Specify the criteria operator.

**Value**

Enter the criteria value. If a prompt table is associated with the profile field, the Value field will contain a lookup. Otherwise, you can enter freeform 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 will return a selection only when *all* linked conditions are met.

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

---

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

<b>Available Operator</b>	<b>Profile Type</b>	<b>What is Included</b>
is empty	One Row	Includes any record where there is no data in the selected field.
is not empty	One Row	Includes any record where there is data in the selected field.
is equal to	One Row	Includes any record where the data in the selected field is equal to the specified value.
is not equal to	One Row	Includes any record where the data in the selected field is not equal to the specified value.

<b>Available Operator</b>	<b>Profile Type</b>	<b>What is Included</b>
is less than	One Row	Includes any record where the data in the selected field is less than the specified value.
is no more than	One Row	Includes any record where the data in the selected field is less than or equal to the specified value.
is at least	One Row	Includes any record where the data in the selected field is equal to or greater than the specified value.
is more than	One Row	Includes any record where the data in the selected field is greater than the specified value.
contains	One Row	Includes any record where the character or string data in the selected field contains the specified character or string value.  <b>Note.</b> Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.  <b>Note.</b> This operator is available only in advanced mode.
not contains	One Row	Includes any record where the character or string data in the selected field does not contain the specified character or string value.  <b>Note.</b> Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.  <b>Note.</b> This operator is available only in advanced mode.
starts with	One Row	Includes any record where the character or string data in the selected field starts with the specified character or string value. For example, to select all records where the contact's last name begins with <i>A</i> , specify the value <i>A</i> .  <b>Note.</b> Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.

<b>Available Operator</b>	<b>Profile Type</b>	<b>What is Included</b>
not starts with	One Row	<p>Includes any record where the character or string data in the selected field does not start with the specified character or string value. For example, to include all records except those where the contact's last name begins with <i>A</i>, specify the value <i>A</i>.</p> <p><b>Note.</b> 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 where the character or string data in the selected field ends with the specified character or string value.</p> <p><b>Note.</b> Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.</p> <p><b>Note.</b> This operator is available only in advanced mode.</p>
not ends with	One Row	<p>Includes any record where the character or string data in the selected field does not end with the specified character or string value.</p> <p><b>Note.</b> Do not enter wildcard characters. When appropriate, the system may add wildcard characters, but they should not be entered by the user.</p> <p><b>Note.</b> This operator is available only in advanced mode.</p>
has at least one	One Row w/Choose Many attribute, Many Row	Includes any individual having at least one associated record where the data in the selected field is equal to the specified value.
has all	One Row w/Choose Many attribute	Includes any record where the data in the selected field includes all values specified. If any specified values are missing, the record 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 where the data in the selected field is equal to the specified value.
has none	One Row w/Choose Many attribute, Many Row	Includes any individual having no associated records where the data in the selected field is equal to the specified value.

<b><i>Available Operator</i></b>	<b><i>Profile Type</i></b>	<b><i>What is Included</i></b>
has only	Many Row	Includes any individual having only associated records where the data in the selected field is equal to the specified value.
has other than	Many Row	Includes any individual having at least one associated record where the data in the selected field is not equal to the specified value.
has only empty	Many Row	Includes any individual having only associated records where no data is contained in the selected field.
has none empty	Many Row	Includes any individual having only associated records where data is contained in the selected field.
has at least one empty	Many Row	Includes any individual having at least one associated record where no data is contained in the selected field.
has other than empty	Many Row	Includes any individual having at least one associated record where data is contained in the selected field.
has all less than	Many Row	Includes any individual having only associated records where the data in the selected field is less than the specified value.
has all more than	Many Row	Includes any individual having only associated records where the data in the selected field is more than the specified value.
has none less than	Many Row	Includes any individual having no associated records where the data in the selected field is less than the specified value.
has none more than	Many Row	Includes any individual having no associated records where the data in the selected field is more than the specified value.
has any less than	Many Row	Includes any individual having at least one record where the data in the selected field is less than the specified value.
has any more than	Many Row	Includes any individual having at least one record where the data in the selected field is more than the specified value.

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

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

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

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See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*.

## Reviewing and Saving Audience Creation Information

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

The screenshot shows the 'Create a Target Audience' interface. At the top, there are three numbered steps: 1 (blue), 2 (blue), and 3 (yellow), indicating the current step. Below the steps is the title 'Step 3: Review and Save'. The main content is divided into two sections: 'Selection Criteria' and 'Audience/Count Generation'. The 'Selection Criteria' section contains a text box with the criteria: 'Select Contact for a Company, Consumer, Contact for a Partner where Individuals.People.SetID is equal to CRM01 and Individuals.People.Do Not Contact is not equal to Yes and Individuals.Sales Leads.Lead Rating has at least one Hot'. Below this text are two buttons: 'Edit Roles' and 'Edit Criteria'. The 'Audience/Count Generation' section has three radio button options: 'Save without generating' (selected), 'Schedule audience generation' (with 'Time' and 'Date' input fields), and 'Start audience generation now'.

Create a Target Audience - Review and Save page

### Selection Criteria

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

### Audience/Count Generation

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

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

### Generating an Internal Audience Using Combined Audiences

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

- |                      |   |
|----------------------|---|
| <b>Audience Name</b> | Select an existing audience to include in the new audience. Add all additional audiences required to make up the combined audience. |
|----------------------|---|

## Importing an Audience

Creating an imported audience involves defining an audience shell within PeopleSoft Marketing, then importing audience data into the CDM using the CDM Data Import process. The CDM Data Import process populates the audience table. Once 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 *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Importing Data Into PeopleSoft Enterprise CRM”.

## Generating an Audience Using PeopleSoft Query

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

---

**Note.** Audience Builder does not support explicit ordering in the query. If query has a sort order, the sort will be 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.

---

<b>Query Name</b>	Select the query created using PeopleSoft Query Manager.
<b>Modified Query SQL</b>	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.

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

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<b>Query Manager</b>	Click to access the PeopleSoft Query Manger.
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See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Query*

## Cloning an Audience

<b>Clone Audience</b>	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 <i>In Design</i> , regardless
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of the status of the source audience. The cloned audience must pass through the regular status stages including generation.

## Creating Test Audiences

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

**Create Test Audiences**

---

**Source Audience**

<b>Audience Name</b> Company Contacts Audience	<b>Status</b> Committed
<b>Owner Name</b> Burt Lee	<b>Last Update</b> 10/14/2002 1:12PM
<b>Type</b> Fixed	<b>Count</b> 700

**Test Audiences**

Enter Number of Test Audiences

	Audience Name	Percent	Limit	
1	Company Contacts Audie Test 1	10.00	10	
2	Company Contacts Audie Test 2	10.00	10	

**Total**

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

Create Test Audiences page

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

**Note.** The Create Test Audiences button is 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, as only the test audiences are included in the total.

**Limit**

Enter a maximum count for the test audience. The limit overrides the percentage value. For example, if your original audience size is 210 and you

create a test audience of 10 percent with a limit value of 20, the test audience size is 20 rather than 21.

## Creating and Updating Segments

Access the Segment Detail page.

### Segment

Save
+ Add Segment
+ Add Child Segment
+ Add Sibling Segment
Search
Refresh
Clone

Segment Detail
Result List
Activities
Correspondence
Team
Costs
Notes

#### Segment Hierarchy

View Group Default

Expand All
Collapse All
First
1-1 of 1
Last

+
[New Segment] - (0)

#### Segment Details

\*Segment Name Student Gold Segment

\*Status In Design

Count 0

Last Generated

Parent Segment  🔍

\*Segment Group Default 🔍 📄

Owner Brett McGrath 🔍

Last Updated 05/25/2006 1:35PM

Publish Segment

#### Segment Definition

##### Roles

Contact for a Company

Consumer

Contact for a Partner

Worker

##### Selection Criteria

And/Or	Profile Field	Operator	Value
	Individuals.People.First Name <span style="float: right;">🔍</span>	is not empty <span style="float: right;">▼</span>	

+
-

[Switch to Advanced Mode](#)

Segment Detail page (1 of 2)

**Segment/Count Generation**

Date Last Generated Count 0

Generate Segment/Count  None  
 Date   Time   
 Now

Segment Generation Log

Clone Segment Test SQL/Count

Save | Add Segment | Add Child Segment | Add Sibling Segment | Search | Refresh | Clone | Top of Page

\* Required Field

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

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

### View Group

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

Selecting a segment group refreshes the page and displays the segments that are part of the selected group so 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 *Contact for a Company* (a representative of a company), a *Consumer*, or a *Contact for a Partner* (a representative of a partner). It is possible for someone to appear as both, or even appear as a contact multiple times, if the individual represents more than one company. You must select at least one option, but may select more than one to include all eligible records.

### Selection Criteria

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

See [Chapter 7, “Using Audiences,” Creating and Updating Audiences, page 88.](#)

## 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 88.](#)

## Defining a Segment Group

Access the Define Segment Group page.

Define Segment Group page

A Segment Group is a way to arrange 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 *Active* to make the segment group available to have segments and hierarchies assigned to it; select *Inactive* to make it unavailable.

## Associating Audiences and Segments with Activities

Access the Audiences - Activities or Segments - Activities page.

**Audience** Appliance Contact List  
**Owner** Burt Lee  
**Status** Approved  
**Last Updated** 10/09/2002 5:16PM

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

**Associated Activities** Customize | Find | View All | First 1-2 of 2 Last

Program	Activity
Appliances Commercial Campaign	Television Commercial
Appliances Commercial Campaign	Telemarketing Wave

Activity

Save | Add | Search | Refresh | Clone | Export | Next | Top of Page

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 only a view of existing data, and you cannot attach an audience or segment to an activity from it.

<b>Program</b>	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.
<b>Activity</b>	Displays an activity with which the audience or segment is associated. Click to access the Campaign Detail - Activity Details page.
<b>Activity</b>	Select the campaign activity with which to associate the audience or segment. The association will be made when the audience or segment is saved.

## Creating Audience and Segment Plans

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

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

## Associating Costs with an Audience or Segment

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

**Audience**  
 Save | Add | Search | Refresh | Clone | Export | Previous | Next  
**Audience** Company Contacts Audience **Status** Committed  
**Owner** Burt Lee **Last Updated** 10/14/2002 1:12PM

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

**Record Costs** Find | View All | First 1 of 1 Last  
 \*Cost Type Variable Unit Cost Forecast Value Actual Value  
 External List Variable [ ] [ ] [ ]  
 Add Cost Calculate Totals [ ] [ ]

Save | Add | Search | Refresh | Clone | Export | Previous | Next | Top of Page  
 \* Required Field

### Audiences - Costs page

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

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

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

**Unit Cost** Enter the cost of one unit.

**Forecast Value** Enter the expected cost of all units.

**Actual Value** Enter the actual cost of all units.

## Viewing and Adding Audience or Segment Notes

Access the Audiences - Notes page.

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

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

## Removing Records from a Generated Audience

Access the Audience - Result List page.

**Audience** Company Contacts Audience      **Status** Committed  
**Owner** [Burt Lee](#)      **Last Updated** 10/14/2002 1:12PM

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

**Show Deleted Rows**

**Results**      Customize | Find | View All      First 1-7 of 7 Last

Name		Email	Phone	Address	Personal	Misc.	Prefs.
Last Name	First Name	Middle Name	Salutation	Suffix			
Levy	Rick						
Williams	Victoria						
Cox	Terry						
Kingston	Halle						
Blaine	Richard		C.				
Dobbs	Fred		C.				
McGuire	Maureen		J.				

Audience - Result List page

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

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

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

#### Show Deleted Rows

Select the check box to return deleted records to the display.

#### Select

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

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

#### Delete Selected Rows

Click the Delete Selected Rows button to remove selected records. The system removes the records when the page is saved.

#### Restore Selected Rows

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

### Customizing Your Audience Records Page

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

Click the Customize link to go to the Personalize Column and Sort Order page when you can specify the information 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.

The Audiences - Correspondence page provides a summary view of all correspondence associated with an audience and enables you to create a new email or print correspondence using PeopleSoft CRM Correspondence Management functionality. Complete information on using Correspondence Management is available in the PeopleSoft Application Fundamentals 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 *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Correspondence Management”.

See [Chapter 4, “Setting Up PeopleSoft Enterprise Marketing and Telemarketing,” Defining Audience Information, page 48.](#)

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*.

## Defining Teams for an Audience

Access the Audience - Team page.

**Audience**

Save | Add | Search | Refresh | Clone | Export | Previous | Next

**Audience** Company Contacts Audience      **Status** Committed  
**Owner** [Burt Lee](#)      **Last Updated** 10/14/2002 1:12PM

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

**Team Members**      Customize | Find | View All |      First 1-2 of 2 Last

Owner	*Name	
<input type="checkbox"/>	Alan Bailey	<input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Ravi Jognu	<input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Delete"/>

Add Team Member

**Team Roles**      Customize | Find | View All |      First 1 of 1 Last

*Role Name	Description	
<input type="text"/> <input type="button" value="Lookup"/>	Manager	<input type="button" value="Delete"/>

Add Team Role

Save | Add | Search | Refresh | Clone | Export | Previous | Next      [Top of Page](#)

\* Required Field

Audience - Team page

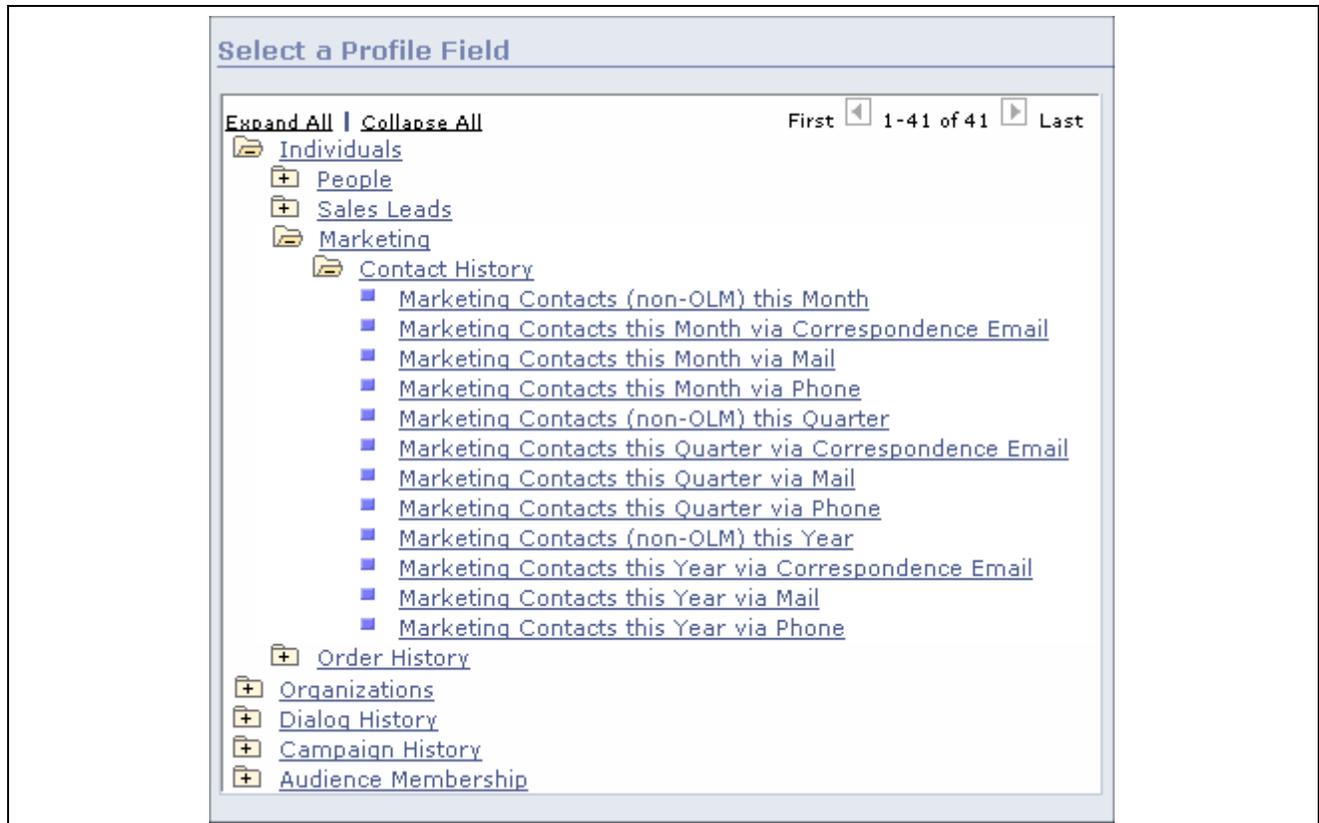
- Owner**      Select this check box to designate the indicated person as the team owner.
- Name**      Enter a name in the field or use the lookup to select one.
- Add Team Member**      Click this button to add another row to the list.
- Role Name**      Enter a role name or use the lookup to select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

## Using Delivered Active Analytics Framework Terms with Audiences

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

### Marketing Interaction Data

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



Contact History folder

**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.

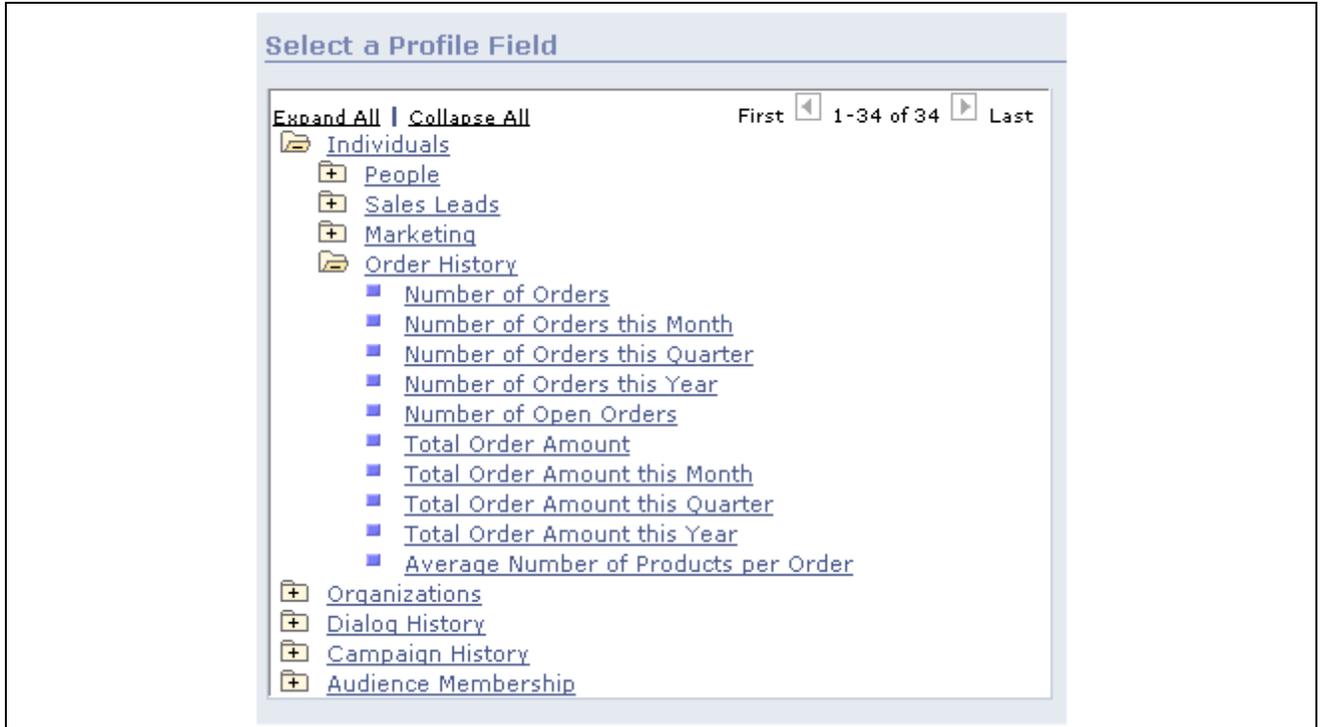
- Marketing Contacts this Month.
- Marketing Contacts this Month via Email.
- Marketing Contacts this Month via Mail.
- Marketing Contacts this Month via Phone.
- Marketing Contacts this Quarter.
- Marketing Contacts this Quarter via Email.
- Marketing Contacts this Quarter via Mail.
- Marketing Contacts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

Phone contacts are calculated from Telemarketing 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.

---

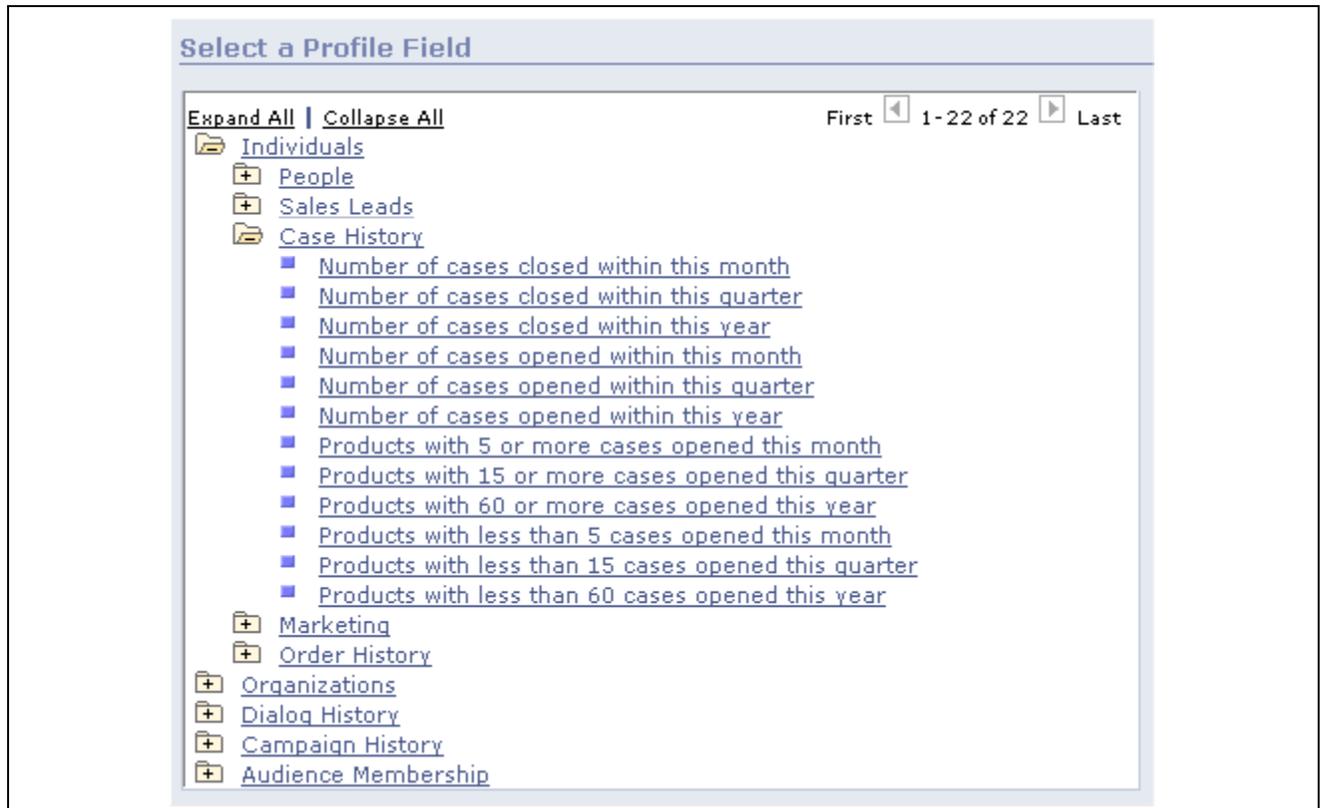
- Number of Orders this Month.\*
- Number of Orders this Quarter.\*
- Number of Orders this Year.\*
- Number of Orders.\*
- Number of Open Orders.\*\*
- Total Order Amount this Month.\*
- Total Order Amount this Quarter.\*
- Total Order Amount this Year.\*
- Total Order Amount.\*
- Average Number of 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 less than 5 cases opened this month.
- Products with less than 15 cases opened this month.
- Products with less 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 [Chapter 7, "Using Audiences," Creating and Updating Audiences, page 88.](#)

### Marketing Execution and Response Data

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

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



Campaign History folder

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

## Dialog Execution and Response Data

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

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

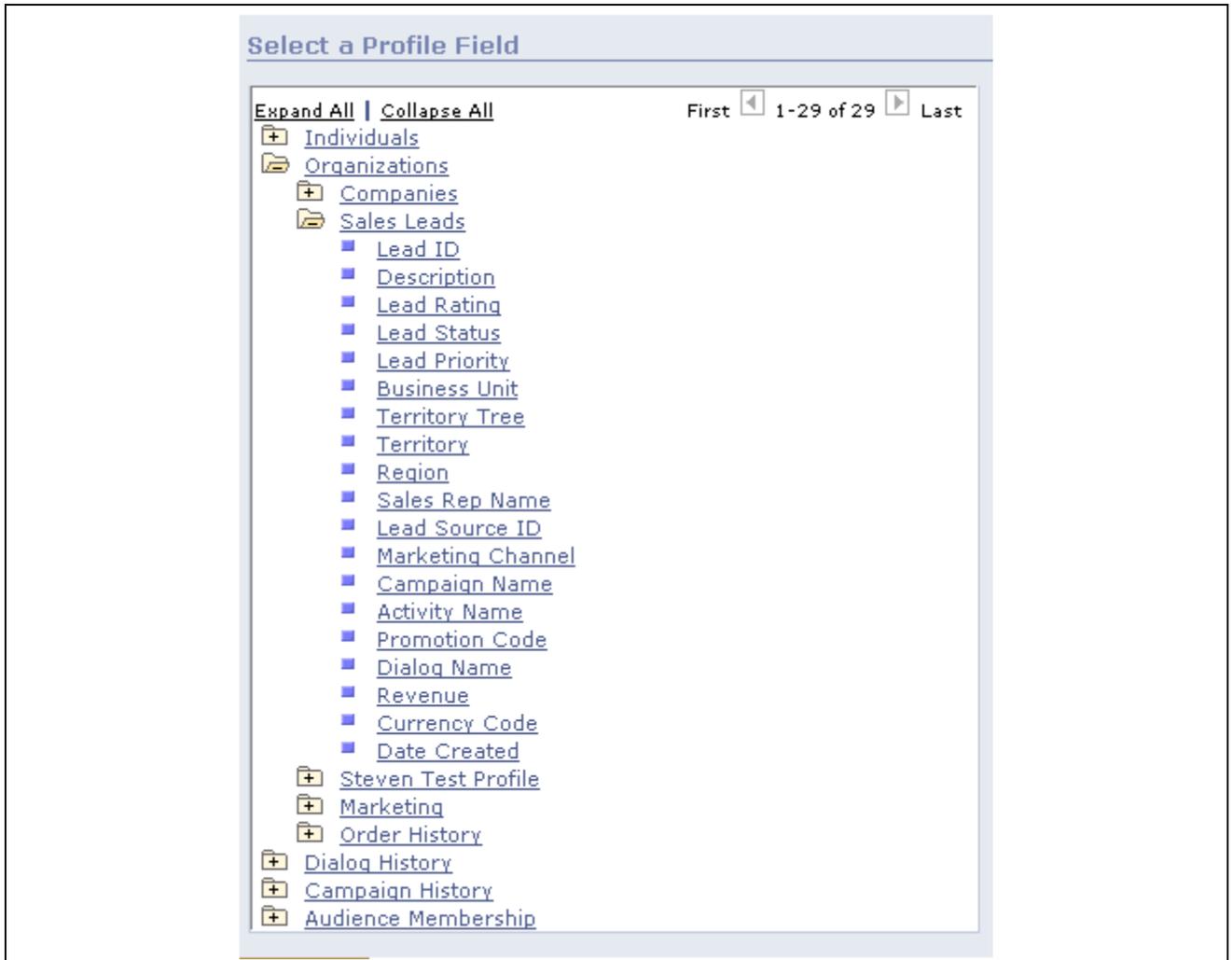


Dialog History folder

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

## Defining Active Analytics Framework Terms for Audiences

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework".

### AAF Resolution Methods

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

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

### AAF Implementation Limitations

The AAF Data Library 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 must be true of any AAF term available to the Audience Builder:

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

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

### **Supported Operators**

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

Term Data Type	Implementation Returns One/Many	Supported Operators
String	One	is empty, is not empty, is equal to, is not equal to, is less than, is no more than, is more than, is at least, contains**, not contains**, starts with*, not starts with*, ends with*, not ends with*, is one of*  *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

This section 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 only export *Internal* audiences and audience with a status of *Approved*, *Archived*, *Committed*, or *Generated*.

---

### Page Used to Export Audiences

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

### Exporting an Audience

Access the Export Audience page.

### Export Audience

---

**Source Audience**

<b>Audience Name</b> Appliance Contact List	<b>Status</b> Committed
<b>Owner Name</b> Burt Lee	<b>Last Update</b> 10/09/2002 5:16PM
<b>Type</b> Fixed	<b>Count</b> 58

**Export File**

\***Description**

\***File Name**

**Status** Pending

**Export Columns** First ◀ 1-8 of 8 ▶ Last

Order	Profile Field	
<input type="radio"/>	Individuals.People.Last Name	🗑️
<input type="radio"/>	Individuals.People.First Name	🗑️
<input type="radio"/>	Individuals.People.Social Security Number	🗑️
<input type="radio"/>	Individuals.People.Address1	🗑️
<input type="radio"/>	Individuals.People.Address2	🗑️
<input type="radio"/>	Individuals.People.City	🗑️
<input type="radio"/>	Individuals.People.State	🗑️
<input type="radio"/>	Individuals.People.ZIP Code	🗑️

**Choose Columns to Export**

- Individuals
  - People
    - SetID
    - Role Type
    - External ID
    - Source ID
    - First Name
    - Last Name
    - Social Security Number
    - Middle Name
    - Suffix
    - Salutation
    - Gender
    - Email
    - Email Alternative
    - Email Domain
    - Address1
    - Address2
    - Address3
    - Address4
    - City
    - State
    - ZIP Code
    - Country

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 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 will 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 Enterprise CRM 9 Application Fundamentals PeopleBook*



## 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 Enterprise CRM 9 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:

Campaign Policy Name	Trigger Point Name	Action Name	Role Name	Correspondence Package	Mode
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 Status changed to <i>Approved</i> .	After a Campaign is Saved	Worklist to Campaign Manager	Marketing Campaign RoleUser	Campaign Status Changed	

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

<b>Campaign Task Policy Name</b>	<b>Trigger Point Name</b>	<b>Action Name</b>	<b>Role Name</b>	<b>Correspondence Package</b>	<b>Mode</b>
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:

<b>Content Policy Name</b>	<b>Trigger Point Name</b>	<b>Action Name</b>	<b>Role Name</b>	<b>Correspondence Package</b>	<b>Mode</b>
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	

<b>Content Policy Name</b>	<b>Trigger Point Name</b>	<b>Action Name</b>	<b>Role Name</b>	<b>Correspondence Package</b>	<b>Mode</b>
		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:

<b>Content Task Policy Name</b>	<b>Trigger Point Name</b>	<b>Action Name</b>	<b>Role Name</b>	<b>Correspondence Package</b>	<b>Mode</b>
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:

<b>Offer Policy Name</b>	<b>Trigger Point Name</b>	<b>Action Name</b>	<b>Role Name</b>	<b>Correspondence Package</b>	<b>Mode</b>
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 telemarketing prospects from a campaign audience.

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## Understanding Campaigns and Activities

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

This section discusses:

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

### It Starts with a Campaign

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

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

## Marketing Programs

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

- Campaigns.
- Roll ups.
- Dialogs.

Campaigns and roll ups are discussed in this chapter. Dialogs are discussed in the Online Marketing documentation.

See *PeopleSoft Enterprise Online Marketing 9 PeopleBook*.

## Roll Ups

A roll up is a marketing program created for the express purpose of serving 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 sub-campaigns, 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 content), 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:

<b>Campaign objective</b>	An effective campaign combines various marketing activities in a concerted effort to achieve one central goal, or campaign <i>objective</i> .
<b>Campaign team</b>	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</i> , <i>sites</i> , <i>partners</i> , and <i>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.
<b>Campaign owner</b>	Employee responsible for the campaign. A campaign owner: <ul style="list-style-type: none"> <li>• Takes responsibility for the successful design and execution of a campaign.</li> <li>• Is functionally the same as any other employee.</li> </ul>

- Serves as campaign manager.

## Activity Characteristics

Every activity has the following characteristics:

<b>Budget</b>	Money allocated for the activity.
<b>Activity Type</b>	Tactic that you use to influence the target audience.
<b>Marketing Channel</b>	Medium that you use to deliver the message.
<b>Channel Detail</b>	Specific media outlet that you use to deliver the message.

Define activity characteristics on the Campaigns - Activity Detail page.

### Activity Budgets and Costs

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

The system verifies budget amounts—activity budgets are checked within the overall budget of the campaign, and the campaign overall budget is checked against the roll up budget (if there is one). If any of the budgets are exceeded, a warning is displayed. As an example, assume Rollup A has two child campaigns, Campaign B and Campaign C. If Rollup A's budget is \$10,000, Campaign B's budget is \$7,000, and Campaign C's budget is \$5,000, a warning message is displayed because the total of the two child campaigns' budgets, \$12,000, exceed 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 will appear because the activity budgets exceed the campaign budget.

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

---

**Note.** Child programs using different currency codes can be added to roll ups—the roll up's budget will take 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 the specific outlet, such as the NBC network or a local newspaper is termed the *Channel Detail*.

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

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

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

### Audience

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

### Offer

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

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

### Content

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

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

### Scripts

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

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

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

---

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

---

## See Also

[Chapter 7, “Using Audiences,” page 81](#)

[Chapter 6, “Using Offers,” page 67](#)

[Chapter 5, “Creating Campaign Content,” page 57](#)

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Defining Scripts”*

## Campaign Triggers

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

### Trigger Schedules

Using triggers, you can initiate up to six actions:

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

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

## Tasks Associated with Campaigns

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

“You select tasks to add to the campaign by using the Task or Task Sets drop-down lists 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.

## Understanding Campaign and Activity Status

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

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

---

## Common Elements Used in this Chapter



**Clone this Campaign**

Click this button to clone this campaign.

---

**Note.** Cloned campaigns duplicate everything in the campaign definition except triggers and audiences.

---



**Email**

Click this button to email campaign information to recipients.



**Calendar**

Click this button to view the Marketing Calendar.



**Reporting**

Click this button to display Interactive Reports you can use to analyze the marketing programs.



**Add Program**

Click this button to display the Marketing Program Add page, where you can add new marketing programs.



**Next**

Display the next program in the list.



**Previous**

Display the previous program in the list.

---

## Creating Campaigns

In this section, we discuss how to:

- Manage and define campaigns, assign campaign sponsors, and assign campaign team members.
- View and define campaign activities.
- Define triggers.
- View and define campaign tasks.
- View and manage campaign audiences.
- Define campaign costs.
- Measure campaign performance.
- View and manage campaign notes.
- View campaign attributes.
- View campaign schedules.

## Pages Used to Create Campaigns

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

Page Name	Object Name	Navigation	Usage
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.

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

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

---

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

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**Note.** Selecting a roll up name in 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.

Marketing Programs - Plan Campaign Program page (1 of 2)

**Sponsors and Budgets**

Sponsor Name	External	Budget Source	Budget Amount
Jack Diamond	<input type="checkbox"/>	Marketing Budget	
Cool Solutions	<input checked="" type="checkbox"/>	External Budget	30000.00

[Add a New Sponsor / Budget](#)

---

**Team Members** Find | View All |  First 1-4 of 4 Last

Name	Phone	Email	Team Role
Eddie Chen	No Telephone	E-mail address was not found	Enterprise Channel M
Gina Hernandez	408/745-7827	ghernandez@coolsolutions_psft.com	Partner Marketing M
Jack Diamond	No Telephone	jdiamond@gbi_psft.com	Campaign Manager
Hans Weimann	408/745-7182	hweimann@coolsolutions_psft.com	

[Add a New Team Member](#)

---

**Go To** [View Attributes](#)

[Save](#) [Refresh](#) [Notification](#) [Clone](#) [Calendar](#) [Reporting](#) [Search](#) [Add](#) [Top of Page](#)

\* Required Field

Marketing Programs - Plan Campaign Program page (2 of 2)

- 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 you will accomplish with this campaign.
- Status** Select the position of the campaign in its life cycle.

**Note.** Once the campaign status is set to Executing or Approved, nothing in the definition can be changed without changing the campaign status.
- Owner** Displays the descriptive name of the user who is primarily responsible for the campaign.
- Start Date and End Date** Enter the date when the campaign begins and ends. Start and end dates for campaigns that are part of a 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.

**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.

---

<b>Sponsor Name</b>	Select a sponsor name from the lookup table.
<b>External</b>	Select this check box if the sponsor is external (for example, a partner or partner contact).
<b>Budget Source</b>	Select the department funding the campaign.
<b>Budget Amount</b>	Enter the amount of money allocated for the campaign.
<b>Add a New Sponsor/Budget</b>	Click the Add a New Sponsor/Budget button 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.)

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See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*.

## Campaign Team Members

<b>Name</b>	Select the name of each person included in the campaign team from the lookup table. Phone and Email information will display when available.
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---

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

---

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

<b>Add a New Team Member</b>	Click to enter additional team members.
------------------------------	---

The following campaign team roles are delivered:

Role	Description
Marketing Manager	<ul style="list-style-type: none"> <li>• Manages the design and execution of campaigns.</li> <li>• Determines campaign resources needs.</li> <li>• Manages contact strategies.</li> <li>• Approves campaigns.</li> <li>• Selects campaign channels.</li> <li>• Approves promotional offers.</li> <li>• Oversees campaign budgets.</li> <li>• Manages relationships with the managers of campaign channels (newspaper publishers, webmasters, and so on).</li> <li>• Evaluates and fine-tunes campaigns in progress.</li> </ul>
Campaign Manager	<ul style="list-style-type: none"> <li>• Supervises campaign teams.</li> <li>• Creates promotional offers.</li> <li>• Manages detail planning and execution of one or several campaigns.</li> <li>• Assigns specific tasks to campaign team members.</li> <li>• Coordinates activities with other campaign managers.</li> <li>• Evaluates campaigns in progress and suggests changes to the marketing manager.</li> <li>• Establishes campaign budgets.</li> </ul>
Marketing Analyst	<ul style="list-style-type: none"> <li>• Defines, analyzes, and manages target audience lists.</li> <li>• Maintains understanding of applications, including PeopleSoft Marketing.</li> <li>• Helps create campaign hierarchies.</li> <li>• Manages campaign elements, including audiences, offers, and content.</li> <li>• Generates and analyzes campaign performance reports.</li> </ul>
Marketing Researcher	<ul style="list-style-type: none"> <li>• Performs exploratory analysis of marketing campaigns and target audience lists.</li> <li>• Analyzes customer affinities and behaviors.</li> <li>• Builds and manages predictive models for targeting audiences.</li> <li>• Runs marketing optimization programs.</li> <li>• Acts as liaison to the IT department.</li> </ul>

Role	Description
Marketing Creative	<ul style="list-style-type: none"> <li>• Creates campaign content.</li> <li>• Manages relationships with ad agencies or an internal ad group.</li> <li>• Manages the relationship with the fulfillment shop.</li> </ul>
Marketing App Administrator (marketing application administrator)	<ul style="list-style-type: none"> <li>• Creates user profiles.</li> <li>• Sets up user security and roles.</li> <li>• Defines marketing channels.</li> <li>• Defines campaign objectives.</li> </ul>

---

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

---

**Go To**

**View Attributes**

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

**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’s name is listed with its type, name, and budget.

**See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Security and User Preferences”

**Accessing Activities and Attaching Additional Activities to Campaigns**

Access the Marketing Programs - Activity Summary page.

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

**Activity Name**

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

**Add a New Activity**

Click to add a new activity.

---

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

---

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

## Defining Activities

Access the Marketing Programs - Activity Detail page.

**Marketing Programs**

Save Refresh Notification Clone Calendar Reporting Search >> Personalize

Program Start Date End Date Status New Program Type Campaign

Program Activities Triggers Tasks Costs Audience Performance Notes

Go To Select One...

Activity Summary Customize Find View All First 1 of 1 Last

General Budget and Objective Audience and Offers Content and Script

Activity Name	Status	Start Date	End Date	End Response	Activity Type	Marketing Channel	Channel Detail
<input type="checkbox"/> Direct Field Leads	Executing	07/12/2006	08/11/2006	08/11/2006	Direct	Sales Agents	

Clone Selected Activity Add a New Activity

**Activity Detail**

Activity Direct Field Leads Promotion SECTIONAL10

Status Executing \*Start Date 07/12/2006

Objective Priority Medium \*End Date 08/11/2006

Budget 7,000.00 End Response 08/11/2006

**Channel**

Activity Type Direct Marketing Channel Sales Agents

Channel Detail

\*Audience Offer Content Script Name

Marketing Programs - Activity Detail page (1 of 2)

**Description for Sales Team**

Text entered in the following fields will be displayed on sales leads generated by this activity.

**Summary**

**Call to Action**

---

**Record Costs** Find | View All | First 1-2 of 2 Last

*Cost Type	Components	Variable	Unit Cost	Planned Cost	Actual Cost
<input type="text" value="Vendor"/>	Administrative	Variable	<input type="text"/>	3,000.00	1,783.83
<input type="text" value="Printing"/>	Content	Variable	<input type="text"/>	58,750.00	59,000.00
			<b>Totals</b>	61,750.00	60,783.83

---

**Review Activity Performance Metrics** Find | View All | First 1-2 of 2 Last

*Metric	UOM	Forecast Value	Actual Value	Difference
<input type="text" value="Number of Leads"/>	Count	37.00		<input type="button" value="View"/>
<input type="text" value="Number of Targeted"/>	Count	2.00		<input type="button" value="View"/>

**Generation Date** 07/12/2006 10:15AM

Marketing Programs - Activity Detail 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 as it identifies the activity. This code is generated automatically. Promotion is used to integrate Marketing with Order Capture by associating the order with the offer that is on the activity record.

### Status

Displays the position of the activity in its life cycle.

---

**Note.** Only activities with a status of New can be deleted. Further, once an activity has been placed in Stopped status, none of its associated components (such as Offer, Audience, or Content) can be deleted.

---

### Start Date and End Date

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

### Objective

Select the objective that describes the purpose of this activity.

### Priority

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

<b>Budget</b>	Enter the amount of money allocated for the activity. The system accepts standard monetary formats, such as 10,000 USD.
	<hr/> <b>Note.</b> Establish the campaign currency on the Marketing Programs - Plan Campaign Program page (Sponsor section). <hr/>
<b>End Response</b>	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.
<b>Channel</b>	
A channel is how you get the message to the audience. A full channel definition requires selection of both an Activity and a Marketing Channel. Under certain circumstances, a Channel Detail selection is needed as well.	
The fields available in this section depend on the activity and marketing channel combination selected. Not all fields are used with all combinations.	
Activity, Marketing Channel, and Channel Detail values are defined in setup.	
<b>Activity Type</b>	Enter the means by which you convey the marketing message.
<b>Marketing Channel</b>	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 <i>Telemarketing</i> causes the page to display the Specify Telemarketing Details section.
<b>Channel Detail</b>	This field only appears when the Activity selection is <i>Broadcast</i> and the Marketing Channel selection is TV or Radio.
<b>Audience</b>	If the channel execution is <i>Telemarketing</i> , <i>Sales Force</i> , <i>Order Capture</i> , or <i>Mail Correspondence</i> , select the audience that you want to attach to the activity.
<b>Package Name</b>	If the channel execution is <i>Mail Correspondence</i> , select a correspondence package. Correspondence templates are created in the Correspondence setup component.
<b>Offer</b>	If the channel execution is <i>Telemarketing</i> , <i>Sales Force</i> , <i>Order Capture</i> , or <i>Mail Correspondence</i> , select the offer that you want to attach to the activity.
<b>Content</b>	If the channel execution is <i>Telemarketing</i> , <i>Sales Force</i> , <i>Order Capture</i> , or <i>Mail Correspondence</i> , select the content that you want to attach to the activity.
<b>Send Date</b>	If the channel execution is <i>Mail Correspondence</i> , this field displays the date the message package (email or mail) was sent.
<b>Script Name</b>	If the channel execution is <i>Telemarketing</i> , or <i>Order Capture</i> , select the script to be used when the activity executes.
	Because different channel types have different scripts associated with them, if an activity's channel type is changed (for example, from Telemarketing to Order Capture) the Script Name field is cleared and must be reselected.
	<hr/> <b>Note.</b> In PeopleSoft Marketing, you can associate scripts with activities for use by other PeopleSoft applications (for example, PeopleSoft Telemarketing), but you cannot execute scripts. <hr/>

**Integration Method**

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

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

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

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

**Advisor**

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

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Correspondence Management”.

See *PeopleSoft Enterprise Real-Time Advisor CRM 9 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 is true:

- The Marketing Channel is a Sales Agent.
- The Marketing Channel is Telemarketing and the Integration field is set to Sales Leads.

If neither of these two conditions are 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 that will help the sales user correctly interpret and convert the generated lead.

See *PeopleSoft Enterprise Sales 9 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 will appear in the grid.

<b>Trigger Point</b>	Select a trigger point from the available options.
<b>Add a Policy</b>	Click this button to create a new Active Analytics Framework policy. You will be prompted to save the campaign first.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

## Record Costs

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

<b>Cost Type</b>	Select the cost type description that uniquely identifies the main purpose of the expense.
<b>Components</b>	Displays the category to which the cost belongs.
<b>Variable</b>	Displays whether the cost type is defined as variable or fixed.
<b>Unit Cost</b>	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.

---

<b>Planned Cost</b>	Enter the amount that you expect to pay for all units of the product or service to be measured in this cost metric.
<b>Actual Cost</b>	Enter the amount that you actually pay for all units of the product or service measured in this cost metric.
<b>Totals</b>	The sum of all planned costs and the sum of all actual costs.
<b>Calculate</b>	Click to calculate total values.
<b>Add a New Activity Cost</b>	Click to add a new cost.

See [Chapter 4, “Setting Up PeopleSoft Enterprise Marketing and Telemarketing,” Defining Cost Elements, page 45.](#)

## Review Activity Performance Metrics

Select the terms by which to measure campaign performance.

<b>Metric</b>	Select the metric by which to measure activity performance.
<b>UOM (unit of measure)</b>	Displays the unit of measure in which the metric is calculated.
<b>Forecast Value</b>	Enter the result that you expect the activity to produce.

<b>Actual Value</b>	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).
<b>Difference</b>	Displays any difference between the forecast and actual values. Over expenditures display as a negative number.
<b>Add a New Activity Metric</b>	Click to add additional activity metrics.
<b>Recalculate</b>	Recalculates all attached metrics.

---

**Note.** All existing metrics are calculated when you enter the Activity Detail page for the first time.

---

See [Chapter 4, “Setting Up PeopleSoft Enterprise Marketing and Telemarketing,” Defining and Creating Metrics, page 38.](#)

## Using Triggers

Access the Marketing Programs - Triggers page.

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

---

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

---

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

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

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

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

---

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

---

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

<b>Trigger Type</b>	Select a trigger type. The trigger type determines when the system executes action requests and controls the field display on the Trigger Detail page. Values are:
---------------------	---

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

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

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

**Add**

Click to add the selected trigger type.

## **Define a Trigger**

Access the Marketing Programs - Trigger Summary page.

The screenshot displays the 'Marketing Programs - Trigger Summary' page. At the top, there are navigation tabs: Program, Activities, Triggers (selected), Tasks, Costs, Audience, Performance, and Notes. A 'Go To' dropdown menu is set to 'Select One...'. Below the tabs is a 'Trigger Summary' section with a table containing one row of trigger data. The table has columns for Trigger Name, Trigger Type, Trigger Condition, Start Date, End Date, and Frequency. The trigger name is 'EXECUTE TELESALSALES PER SURVEY SUCCESS', the type is 'Metric to Value', and the condition is 'Response Rate on Freezer Sales Drive - NA, Satisfaction Survey - Freezer Customers >= 1'. Below the table is a 'Trigger Type' dropdown menu set to 'Select a Trigger' and an 'Add' button. The 'Trigger Detail' section follows, with fields for '\*Trigger Name' (EXECUTE TELESALSALES PER SURVEY SUC), '\*Trigger Type' (Metric to Value), and a 'Select Condition' group box. This group box includes fields for '\*Metric' (Response Rate), '\*Activity' (Satisfaction Survey - Freezer Custo), 'Value' (1), 'Campaign' (Freezer Sales Drive - NA), and 'Operator' (Greater than or Equal to). Below this is a 'Select Trigger Action(s)' group box with options for 'Execute', 'Stop', 'Send Notification', and 'Generate Audience'. The 'Execute' and 'Send Notification' options are checked. The 'Send Notification' option has a 'Recipient' field set to 'Jack Diamond' and an email address 'jdiamond@gbi\_psft.com'. At the bottom is a 'Schedule Check Conditions' group box with 'From' (07/05/2002), 'To' (08/30/2002), 'Frequency' (Weekly), and 'Recurring' (unchecked). The 'Last Executed' date is 08/30/2002 and the 'Count' is 1. An 'Apply Trigger' button is at the bottom left.

Marketing Programs - Trigger Summary page

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

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

### Select Condition Group Box

The trigger type selected determines 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"> <li>• Date</li> <li>• Time</li> </ul>
<i>Metric to Metric</i>	<ul style="list-style-type: none"> <li>• Metric One</li> <li>• Campaign One</li> <li>• Activity One</li> <li>• Operator</li> <li>• Metric Two</li> <li>• Campaign Two</li> <li>• Activity Two</li> </ul>
<i>Metric to Value</i>	<ul style="list-style-type: none"> <li>• Metric</li> <li>• Campaign</li> <li>• Activity</li> <li>• Operator</li> <li>• Value</li> </ul>

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

- Date** Select the date when the system is to execute the trigger.
- 
- Note.** The system displays this field only when you select the trigger type *Date and Time*.
- 
- Time** Enter the time when the system is to execute the trigger. The system recognizes standard time formats, for example, 2:30 p.m. or 02:30 PM or 14:30.
- 
- Note.** The system displays this field only when you select the trigger type *Date and Time*.
- 
- Metric, Metric One, Metric Two** Select a performance metric to apply against a corresponding campaign or activity. Metric One and Metric Two labels indicate that the metric is applied against the campaign or activity with the same designation.
- Campaign One, Campaign Two** Select a campaign against which you want to apply the metric. Selection of a campaign is required. Condition metrics may be applied against any executing campaign.
- Campaign** This field displays the name of the current campaign.
- Activity, Activity One, Activity Two** Select an optional activity within the specified campaign. When an activity is specified, the metric applies only against that activity and no others within the campaign.

<b>Operator</b>	<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"> <li>• <i>Equal to</i></li> <li>• <i>Greater than</i></li> <li>• <i>Greater than or Equal to</i></li> <li>• <i>Less than</i></li> <li>• <i>Less than or Equal to</i></li> <li>• <i>Not Equal to</i></li> </ul>
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---

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

---

<b>Value</b>	Enter a fixed value against which the metric result is compared.
--------------	--

---

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

---

### Select Trigger Actions Group Box

<b>Execute</b>	Select the check box to execute an activity within the current campaign when the trigger condition is true. Execute actions only apply to the campaign activity and not to the campaign itself.
<b>Stop</b>	Select the check box to stop a campaign, or an activity within the campaign, when the trigger condition is true. If no activity is selected, the stop action applies to the campaign.
<b>Send Notification</b>	Select the check box to notify a person when the trigger condition is true. Select the person to notify in the Send Notification field.
<b>Generate Audience</b>	Select the check box to generate an audience when the trigger condition is true. Select the audience to generate in the Generate Audience field. Schedule the Audience Generation Application Engine program to be run by the processor to generate the audience.
<b>Result</b>	After the system attempts to execute a trigger—whether successfully or unsuccessfully—it displays a result message. If the trigger execution attempt is unsuccessful, the result message indicates the nature of the failure.

### Schedule Check Conditions

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

<b>From and To</b>	Enter start and end dates and times between which the system will check for trigger conditions.
<b>Frequency</b>	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.

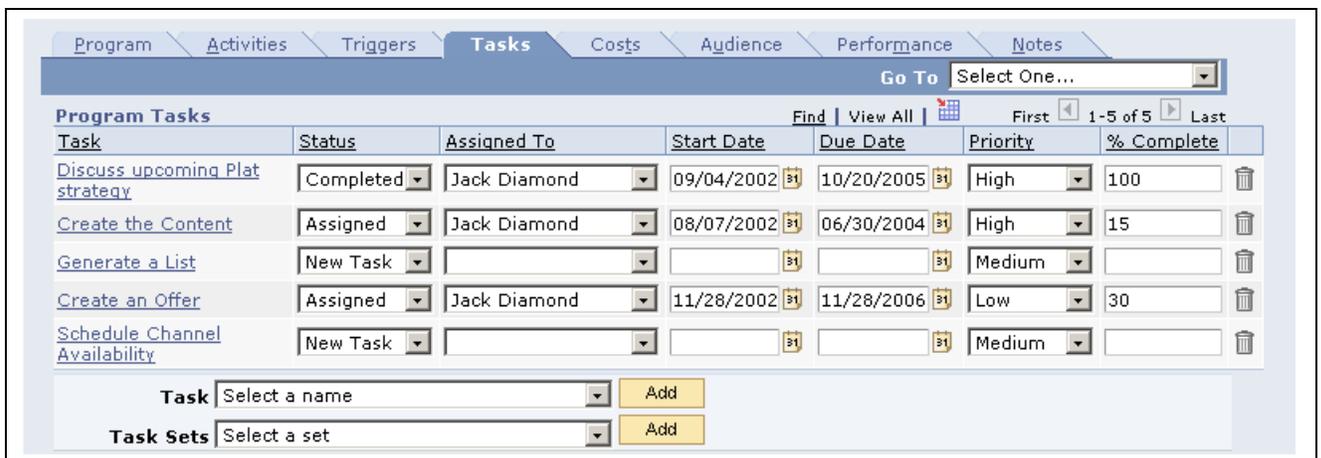
---

**See Also**

[Chapter 4, “Setting Up PeopleSoft Enterprise Marketing and Telemarketing,” Defining Trigger Schedules, page 29](#)

## Defining Campaign Tasks

Access the Marketing Programs - Tasks page.



Marketing Programs – Tasks page

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

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

You use task sets to group individual tasks and add them as a group. For example, when you create a campaign there are three tasks that always need to be added: Create Content, 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 drop down list. To create a new task, select *Create a New Task* and define the new task as required. Otherwise, select a predefined task shell and modify if necessary. Click Add to go to the Marketing Program Tasks - Campaign Task Detail page where you can define a new task or modify an existing one.

**Task Sets**

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

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

**See Also**

Chapter 4, “Setting Up PeopleSoft Enterprise Marketing and Telemarketing,” Defining Task Tools, page 51

## Creating and Updating Campaign Tasks

Access the Marketing Program Tasks - Program Task Detail page.

Program Task Detail page

**Name**

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

**Assigned By**

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

**Assigned to**

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

---

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

---

**Start Date**

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

**Due Date**

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

**Priority**

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

- *High*
- *Medium*

- *Low*

**Status** Select the position of the task in its life cycle. When Status is changed to *Completed*, the Due Date is changed to the current date and the % Complete value is changed to *100*.

**% 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 value is changed to *Completed*.

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

## Working with Campaign Level Costs

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

### Tracking Campaign Level Costs

Access the Marketing Programs - Costs page.

Marketing Programs - Costs page

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

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

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

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

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

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

---

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

---

- Planned Cost** Enter the amount that you expect to pay for all units of the product or service to be measured in this cost metric.
- Actual Cost** Enter the amount that you actually pay for all units of the product or service measured in this cost metric.
- Totals** The sums of all planned costs and all actual costs.
- Calculate** Click to calculate total values.
- Add a New Cost** Click to add a new cost.

### Reviewing Costs

The Campaign - Costs - Review All Costs page displays summary information about all costs associated with a campaign. Costs are summarized by the activity and campaign, and by cost types. For roll up campaigns, all child costs (for associated campaigns, activities, and dialogs) are also displayed.

## Working with Campaign Audiences

Access the Marketing Programs - Audience page.

Audience Name	Status	Associated Activity	Last Update	Priority	Count	Dup. Count
<a href="#">Audience</a>	Committed	Direct Field Leads	09/25/2002 9:27AM		2	0
<a href="#">Bay Area Customers - Premier</a>	Committed	Lab Freezer Cross Sell	09/09/2002 11:17AM		44	0
<a href="#">Phone Preferred Contacts - West</a>	Committed	Sectional Walk-In Follow Up	10/09/2002 3:23PM		9	0
<a href="#">Western Reg Install - Fall02</a>	Committed	Walk-In Freezer Telesales Drive	10/02/2002 5:22PM		45	0
<a href="#">Audience</a>	Committed	Satisfaction Survey - Freezer Customers	09/25/2002 9:27AM		2	0

**▼ Dedup Activity Audiences**

Select "Get Duplicate Counts" to calculate duplicate counts based on the current priority settings.  
 Select "Dedup Audiences" to remove duplicates from lesser priority activities/audiences.  
 Note: Only activities/audiences with nonzero priorities are taken into account when calculating duplicate counts and/or deleting duplicates.

Marketing Programs - Audience page (1 of 2)

▼ **Add a Control Group Audience**

**Control Group Definition**

\*Audience Name

\*Selection Type

**Source Audience Percentages**

Enter a source percentage and priority for each Audience from which to create the control group.  
(Note: Source Audience percentages must total 100% and priorities must be unique.)

Audience Name	Percent	Priority
*Audience		
*Bay Area Customers - Premier		
*Phone Preferred Contacts - Wes		
*Western Reg Install - Fall02		
*Audience		

**Control Group Audience Size**

Minimum Amount

\*Maximum Amount Type  Fixed Amount  
Amount

Percentage of Lists  
Percent

\* Required Field

Marketing Programs - Audience page (2 of 2)

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

### Activity Audiences

The Activity Audiences group box displays information about all audiences associated with the campaign. Information displayed about each audience includes the name of the audience, audience status, the activity to which the audience is attached, the date the audience was last updated, 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.

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

---

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

---

<b>Get Duplicate Counts</b>	Click the button to run a process to determine how many duplicated records exist in each audience. The process is scheduled to run immediately. How long it takes to complete the process depends on the size of the list and other processor activity.
<b>Dedup Audiences</b> (deduplicate audiences)	Click the button to run a process to eliminate duplicated records. Records in the audience with the highest priority value remain as the original record. Duplicated records in all audiences with a lower priority value are eliminated. The process is scheduled to run immediately. How long it takes to complete the process depends on the size of the list and other processor activity.
<b>Priority</b>	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 only be edited if the audience is Approved or if it is a fixed audience.

---

## Add a Control Group Audience

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

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

<b>Audience Name</b>	Enter a descriptive name for the control group audience.
<b>Selection Type</b>	Select the manner in which the system selects specific records and people to place in control groups.  Select <i>Every Nth</i> to select record by an even distribution method. For example, for a control group consisting of five percent of the total audience, every 20th record is selected.  Select <i>Random</i> to select records on a random basis.

---

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

---

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

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

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

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

---

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

---

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

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

## Measuring Campaign Effectiveness

Access the Marketing Programs - Performance page.

*Metric	UOM	Forecast Value	Actual Value	Difference	View
Number of Leads	Count	1,000.00		-1,000.00	Edit
Number of Opportunities	Count	900.00		-900.00	Edit
Number of Quotes	Count	989.00		-989.00	Edit
Opportunity to Quote ratio	Percentage	90.00		-90.00	Edit

Marketing Programs - Performance Metrics page

### Review Campaign Performance Metrics

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

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

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

**UOM** (unit of measure) Displays the unit of measure associated with the selected metric.

<b>Forecast Value</b>	Enter the result that you expect.
<b>Actual Value</b>	Displays the actual result. This field is populated with data from various tables and sometimes from multiple applications (such as PeopleSoft Sales and PeopleSoft Telemarketing).
<b>Difference</b>	Displays the difference between the forecast and actual values.
<b>Edit or View</b>	Click the Edit button to edit an existing metric. Click the View button to return the display to the view mode.
<hr/>	
<b>Note.</b> Only one metric can be edited at a time. No metric changes are effective until the page is saved.	
<hr/>	
<b>Delete</b>	Click the button to delete an existing metric.
<b>Add a New Performance Metric</b>	Click to add a new metric to the existing list.

## Using Campaign Notes

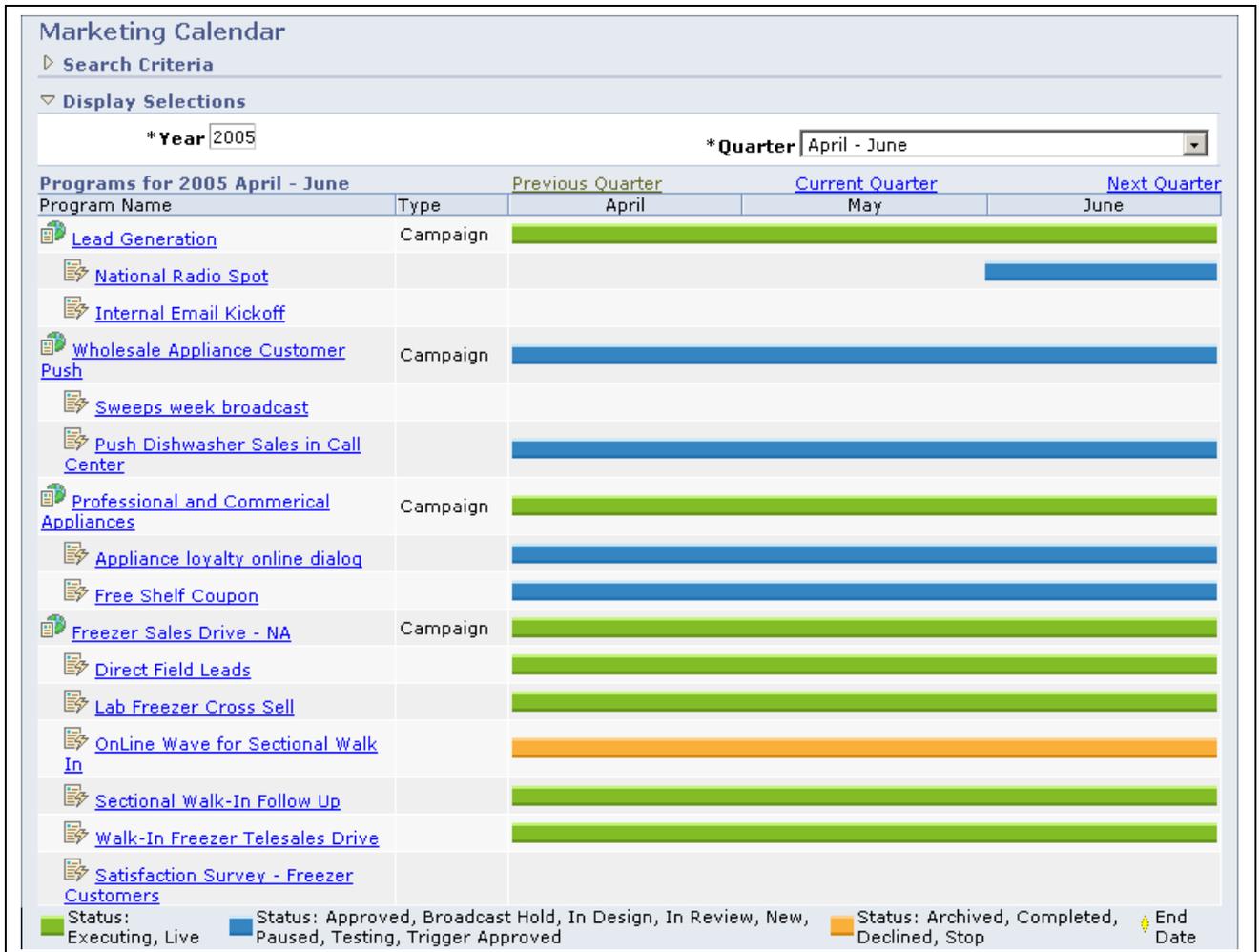
Access the Marketing Programs - Notes page.

Use the Marketing Programs - Notes page to view existing notes and attachments, to email notes, or to add new notes.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

## Viewing the Marketing Calendar

Access the Marketing Calendar page.



Marketing Calendar page

The Marketing Calendar page displays the status and schedule relationship of all campaigns and activities that meet the search criteria you define (Business Unit, Year, and Quarter are required). Schedules are displayed graphically, showing the start and end dates of the campaign at the each level of the hierarchy: Rollup, campaign or dialog, and activity. Campaigns within a 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 Telemarketing Prospects

PeopleSoft Marketing enables you to create leads for PeopleSoft Sales or PeopleSoft Telemarketing. You have the option to create leads either automatically or manually. The automatic process is delivered enabled with the system and generates leads whenever certain conditions are present. The manual process is available at any point.

In this section, we discuss how to:

- Generate sales or telemarketing leads automatically.
- Manually generate sales or telemarketing leads.
- View a generated audience.

- Confirm results of the creation process.

## Pages Used to Create Sales and Telemarketing Leads

Page Name	Object Name	Navigation	Usage
Create Leads	RA_CREATE_LEADS	Marketing, Execution, Manual Leads Creation	Turn campaign audiences into sales or telemarketing leads.
View Activity Audience	RA_VIEW_WAVE_LIST	Click on the View Audience button on the Create Leads page.	View the created audience.
Leads Creation Status	RA_CREATE_LEAD_STA	<ul style="list-style-type: none"> <li>• Click on the View Results button on the Create Leads page.</li> <li>• Marketing, Execution, Lead Creation Status</li> </ul>	Confirm results of the creation process.

## Automatically Generating Sales or Telemarketing Leads

PeopleSoft Marketing is delivered with an Active Analytics Framework term that automatically generates leads from a campaign activity audience for PeopleSoft Sales and PeopleSoft Telemarketing. The term (Marketing Auto List Load) is delivered enabled and can be disabled if you choose. To disable the term:

1. Go to Enterprise Components, Active Analytics Framework, Policies, Manage Policies.
2. On the search page, select Marketing Campaign for the Context Name and click Search.
3. Click on Marketing Auto List Load for the desired SetID.

---

**Note.** In some cases, the term is named CSS: Marketing Auto List Load.

---

4. Click the Modify System Data button.

---

**Note.** If the term has already been modified from its delivered version, this button will not appear.

---

5. Click the Redesign button.
6. Click Edit Actions.
7. Change the status of one or both actions (Process and Auto Generation Started) to Inactive.
8. Click Done and then click Save.

Leads are automatically generated when the channel execution value on the marketing channel definition is set to either sales or telemarketing, and the status of a campaign activity moves from approved (APPR) to executing (EXEC). Leads are produced for PeopleSoft Sales when the channel execution is value is set to sales, and for PeopleSoft Telemarketing when the value is telemarketing. No messages are displayed regarding the lead generation.

### See Also

Chapter 9, “Creating Campaigns and Activities,” Defining Activities, page 141

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”

## Manually Generating Sales or Telemarketing Leads

Access the Create Leads page.

### Create Leads

**Run Control ID** HIT2002-10-10-15.55.29.000000 [Report Manager](#) [Process Monitor](#) Run

This schedules a batch process that will create a Sales/Telemarketing Lead for each member of the Audience that is associated with the Campaign Activity.

#### Create Leads For

<b>*Business Unit</b>	<input type="text" value="HT001"/>	🔍	High Tech	
<b>*Campaign</b>	<input type="text" value="HCP00102"/>	🔍	VPN Sales to Install Base	
<b>*Activity</b>	<input type="text" value="HCW00114"/>	🔍	West Region Sales Leads for VPN	<span style="border: 1px solid black; padding: 2px 5px;">View Audience</span>

#### Status

**Process Status** Successfully Completed View Results

Create Leads page

### Create Leads For

- Business Unit** Select the business unit within which the campaign resides.
- Campaign** Select the campaign within which the activity resides.
- Activity** Select the activity.

---

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

---

- View Audience** Click to access the View Activity Audience page, where you can verify the audience.

---

**Note.** While all audience entries appear, entries that have been deleted or are part of a Control Group are not used to create sales leads or prospects.

---

- Run** Click to run this request. PeopleSoft Process Scheduler runs the Create Sales Leads/Prospects process at user-defined intervals.

### Status

- Process Status** Displays the status of the process. Values are: Not Yet Processed, Successfully Completed, or Completed With Errors.

**View Results**

Click to access the Leads Creation Status page, where you can view the process results.

**Note.** This button is enabled upon completion of the process.

## Viewing a Generated Audience

Access the Campaign Activity Audience page.

The Campaign Activity Audience page enables you to see the actual results of a generated audience.

### Campaign Activity Audience

**Business Unit** HT001 High Tech  
**Campaign** HCP00102 VPN Sales to Install Base  
**Activity** HCW00114 West Region Sales Leads for VPN  
**Audience ID** HCL00103 PacNW Segment

[Return to Create Sales Leads](#)

**Audience Records** Customize | Find |  First  1-5 of 5  Last

Business Object ID	Role Type	Name	Deleted
321	Contact	Albright,Fred	<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"/>

Campaign Activity Audience page

## Confirming Results of the Creation Process

Access the Leads Creation Status page.

### Leads Creation Status

**Process Instance** 8842 **User ID** DGILLESP  
**Run Status** Success **Run Control ID** DGI2004-04-2205.24.38.762000  
**Rows Processed** 7 **Rows in Error** 0

Find | View All First  1 of 7  Last

<b>BO ID</b>	323	<b>Business Unit</b>	US200	<b>Campaign ID</b>	CMP0300006	<b>Activity</b>	WVE0300008
--------------	-----	----------------------	-------	--------------------	------------	-----------------	------------

**Lead ID** 1000300360 **Note** Lead was successfully created.

Leads Creation Status page

The Leads Creation Status page displays detailed information about the results of the Create Leads process.

**Note** Displays notes related to the process. If there are errors in the process, a message might appear for each error.



## CHAPTER 10

# Using PeopleSoft Telemarketing

This chapter provides an overview of PeopleSoft Telemarketing and discusses how to:

- Manage telemarketing.
- Process prospects and responses.

---

## Understanding PeopleSoft Telemarketing

Compared to broadcast, print, or direct mail campaign channels, telemarketing offers the advantage of trained agents talking person-to-person with prospects. Agents can present more information through telemarketing than through other media, as well as answer prospect questions. Additionally, the telemarketing agent can ask for and complete a sale.

PeopleSoft Telemarketing provides powerful tools for both telemarketing managers and agents, plus seamless integration to PeopleSoft Sales and PeopleSoft Order Capture.

PeopleSoft Telemarketing enables telemarketing managers to view details about telemarketing campaign activities and telemarketing agents or teams. Managers can assign individual agents or complete teams to campaigns. By setting up automatic callback rules, managers can define how many times each prospect is available to callers and how often the prospect name appears in the caller queue.

PeopleSoft Telemarketing enables telemarketing agents to access call prospects, activate scripts, and record call results within one component. Activity, offer, and product information is available on convenient tabs, and 360-Degree View functionality provides agents with access to all stored information about the customer.

In addition to facilitating the telemarketing contact, PeopleSoft Telemarketing provides three options for closing the sale. For product offers that can be closed with one phone call, you can transfer prospects who want to place an order to an order capture agent, or the telemarketing agent can capture the order personally. For more complicated products that rely on the telemarketing call to qualify with a follow-up sales call, PeopleSoft Telemarketing can be configured to automatically transfer qualified prospects to the PeopleSoft Sales application. Each of these options depend on the integration method selected as part of the activity definition.

---

**Warning!** To ensure that all telemarketing prospects have a telephone number, include it as part of the audience selection criteria.

---

---

## Managing Telemarketing

This section discusses how to:

- View executing telemarketing campaign activities.

- Link an agent to a campaign activity.
- Link a team to a campaign activity.
- Edit the campaign audience.
- View all teams under a setID.
- Link a campaign activity to a telemarketing team.
- Define rules for automatic callback.

## Pages Used to Manage Telemarketing

Page Name	Object Name	Navigation	Usage
Assign By Campaign	RT_MGR_CMPGN_SMRY	Telemarketing, Manage Telemarketers, Assign by Campaign	View executing telemarketing campaign activities under a business unit.
Assign by Campaign - Assign Agents to Campaign	RT_MGR_CMP_AGT_SEL	Telemarketing, Manage Telemarketers, Assign by Campaign  Click the Assign Agent button on the Assign by Campaign page.	Link individual agents to a campaign activity and establish schedules.
Assign by Campaign - Assign Resources to Campaign	RT_MGR_CMPGN_DTL	Telemarketing, Manage Telemarketers, Assign by Campaign  Click the Assign Team button on the Assign By Campaign page.	Link a team to a campaign activity.
Manage Telemarketing - Edit Campaign Audience	RT_MGR_CMPGN_LIST	Telemarketing, Manage Telemarketers, Assign by Campaign  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.
Assign By Team	RT_MGR_TEAM_SMRY	Telemarketing, Manage Telemarketers, Assign by Team/Agent	View all teams assigned to campaigns under a setID.
Assign by Team - Assign Campaigns To Team	RT_MGR_TEAM_DTL	Telemarketing, Manage Telemarketers, Assign by Team/Agent  Click a team name link on the Assign by Team page.	Link a campaign activity to a telemarketing team.
Call Back Times	RT_OM_CALLBACKS	Telemarketing, Manage Telemarketers, Call Back Times	Define rules for automatic callback for telemarketing campaigns and activities.
Set Acceptable Times	RT_ACCEPTTIMES	Telemarketing, Manage Telemarketers, Set Acceptable Times	Define rules for acceptable calling times.

## Viewing Executing Telemarketing Campaign Activities

Access the Assign By Campaign page.

Assign by Campaign									
Assignments									
Campaign Activity			Priority	Start Date	End Date	Assigned To	First	1-2 of 2	Last
							Calls Remaining	Completed Calls	
<a href="#">Wireless Discount - Telesales</a>			Medium	08/13/2002	12/31/2008	Teams	8	0	
<a href="#">DSL Telesales to Customer Base</a>			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.

**Note.** In order for the telemarketing 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 telemarketing 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 telemarketing teams to campaigns.

**Note.** Agents who are assigned to a campaign activity as part of a team are simultaneously assigned as an individual agent if viewed via the Assign Agent button. This functionality is also useful for assigning a full team plus additional agents, or for assigning a full team and then removing a few people.

## Linking an Agent to a Campaign Activity

Access the Assign by Campaign - Assign Agents to Campaign page.

### Assign Agents to Campaign

---

**Campaign Activity** Wireless Discount - Telesales

**Audience** Consumers - Midwest States

**Start Date** 08/13/2002 **End Date** 12/31/2008

**Priority** Medium

**View Campaign Call Results**

**Not Attempted** 8      **No Contact** 0

**Call Back** 0      **Closed** 0

**Total Count** 8

---

**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.	Telemarketing - Direct Sell, , , , ,	7	2
<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

Customize | Find | View All | First 1-11 of 11 Last

[Select All](#)     [Clear All](#)

Schedule Assignments

[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 button to access the Marketing Programs - Activities page to view details about the campaign activity.



Click the Edit Campaign Audience button to access the Edit Campaign Audience page and filter the list display and remove prospects from the target audience.

### View Campaign Call Results

This group box displays the current status of telemarketing calls for the selected campaign activity.

### Assign Resources

This scroll area displays all telemarketing agents with their current assignments and the status of their calls.

#### Select

Select the check box beside an agent name to assign the agent to the new campaign activity. Assigning an agent makes call prospects available to the agent.

- Select All** Click to assign all agents to the campaign activity.
- Clear All** Click to remove all agents from the campaign activity.
- Schedule Assignments** Click to change the display of the Assign Resources scroll area. The new display enables you to establish specific work schedules for individual agents. Only selected agents are displayed and eligible for scheduling.
- By establishing a work schedule for agents, you control when they can work prospects by assigning start and end dates and times. Agents with assigned schedules only have access to prospects during their assigned dates and times. All assigned dates and times are validated by the system to fit within the overall parameters of the campaign activity.
- When you establish a schedule for an agent originally assigned to the campaign as part of a team, the system changes the assignment status to *Assigned by Agent*. Assignment schedules are not effective until you click the Schedule Assignments button again or click the Save button.
- View All Agents** Click to return the page display to the default view, which lists all agents.

## Linking a Team to a Campaign Activity

Access the Assign by Campaign - Assign Resources to Campaign page.

### Assign Resources to Campaign

**Campaign Activity** Wireless Discount - Telesales

**Audience** Consumers - Midwest States

**Start Date** 08/13/2002 **End Date** 12/31/2008

**Priority** Medium

**View Campaign Call Results**

<b>Not Attempted</b> 8	<b>No Contact</b> 0
<b>Call Back</b> 0	<b>Closed</b> 0
<b>Total Count</b> 8	

**Assignments** Customize | Find | View All |

First  1-7 of 7  Last

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 telemarketing teams and select teams for assignment to the campaign.



Click the Campaign Activity button to access the Marketing Programs - Activities page.



Click the Edit Campaign Audience button to access the Edit Campaign Audience page and filter the audience display and remove prospects.

### **View Campaign Call Results**

This group box displays the current status of telemarketing calls for the selected campaign activity.

### **Assign Resources**

This scroll area displays all marketing teams with their current assignments and the status of their calls.

**Select** Select the check box beside a team name to assign the team to the campaign activity. Assigning a team makes call prospects available to team members.

**Select All** Click to assign all teams to the campaign activity.

**Clear All** Click to clear all selections.

### **Editing the Campaign Audience**

Access the Manage Telemarketing - Edit Campaign Audience page.

### Edit Campaign Audience

<b>Campaign</b> Telemarketing - Direct Sell	<b>Start Date</b> 10/01/2002
<b>Activity</b>	
<b>Priority</b> Medium	<b>End Date</b> 10/01/2003

**Audience** [Customize](#) | [Find](#) | [View All](#) | First ◀ 1-9 of 9 ▶ Last

Select	Name	Status	Team	Assigned To
<input type="checkbox"/>	Bennett,Janie	New	None	None
<input type="checkbox"/>	DeWinter,James	New	None	None
<input type="checkbox"/>	DeWinter,Janice	New	None	None
<input type="checkbox"/>	Eyre,Jane	New	None	None
<input type="checkbox"/>	Hudson,Michelle	New	None	None
<input type="checkbox"/>	Kennedy,Stone	New	None	None
<input type="checkbox"/>	Myers,Jana	New	None	None
<input type="checkbox"/>	Pennington,Jay	New	None	None
<input type="checkbox"/>	Vincent,Jan	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.

[Filter](#) [Clear Filter](#)

**Name**

**Status**

**Team**

Manage Telemarketing - Edit Campaign Audiences page

Remove prospects from the calling list.

## Prospects

- Select** Select the check box beside a prospect name to identify the record for removal from the list.
- Select All** Click to select all prospects for removal from the calling list.
- Clear All** Click to clear all selected records.
- Remove from List** Click to remove all selected records from the list.

## Filter

Use the Filter region to limit the display of prospects. Enter a filter value in one or more of the available fields and click the Filter button.

## View All Teams Under a SetID

Access the Assign By Team/Agent page.

Assign by Team/Agent					
Assignments					
Team Name	Status	Assigned Campaigns	Calls Remaining	Completed Calls	
<a href="#">Appliances Eastern</a>	Active	None	0	0	
<a href="#">Appliances Western</a>	Active	None	0	0	
<a href="#">Hardware North</a>	Inactive	None	0	0	
<a href="#">Literature Request</a>	Active	None	0	0	
<a href="#">Telemarketing East</a>	Active	None	0	0	
<a href="#">Telemarketing West</a>	Active	None	0	0	

Assign by Team/Agent page

View summary information about all available telemarketing teams.

**Team Name** Click to access the Assign Campaign to Team page and link a campaign activity to the team.

## Linking a Campaign Activity to a Telemarketing Team

Access the Assign Campaigns To Team page.

The Assign Campaigns region displays all current campaign activities, the priority, teams currently assigned to the activity, and calls remaining.

**Select** Select the check box beside a campaign activity to assign a campaign team.

**Select All** Click to assign the team to all campaign activities.

**Clear All** Click to remove the team from all campaign activities.

## Defining Rules for Automatic Callback

Access the Set Call Back Times page.

Set Call Back Times						
Set Call Back Times						
*Business Unit	Campaign	Activity	Maximum Callbacks	Number of Days	Number of Hours	
US200	Telemarketing - Freezer Campaign	Telemarketing - Direct Sell	3	1	1	+ -

Set Call Back Times page

Automatic callback rules define when and how often prospects return to the caller queue. Tailor callback rules by any combination of business unit, campaign, or activity.

**Business Unit** Select the campaign’s business unit.

<b>Campaign</b>	Select the campaign for which you want to define callback times.
<b>Activity</b>	Select the activity for which you want to define callback times. You can define different callback rules for each activity within a campaign.
<b>Number Callbacks Allowed</b>	Specify the number of callbacks allowed for this campaign and activity. Enter zero to allow no callbacks. Enter 99 to allow unlimited callbacks.
<b>Add Number of Days</b>	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.
<b>Add Number of Hours</b>	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.

**Set Acceptable Times**

---

**Business Unit** COM01

**Campaign** Wireless Push - Consumer      **Activity** Wireless Discount - Telesales

---

**Set Acceptable Times**

*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	

Add Acceptable Time

\* Required Field

Set Acceptable Times page

Use this page to specify times when it is acceptable for telemarketers to call for the specified campaign and activity.

<b>Day of the Week</b>	Select the day of the week when calls are acceptable, or select <i>All</i> if all days are allowed.
<b>Start Time, End Time</b>	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).
<b>Add Acceptable Time</b>	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 telemarketing campaigns.
- Contact prospects.
- Enter responses received through channels other than telemarketing.

### See Also

Chapter 9, “Creating Campaigns and Activities,” Defining Activities, page 141

## Pages Used to Process Prospects and Responses

Page Name	Object Name	Navigation	Usage
Telemarketing	RT_AGT_CMPGN_SMRY	Telemarketing, Call Prospects	View current telemarketing campaigns.
Call Prospects	RT_AGT_CALL_PRSPT	<ul style="list-style-type: none"> <li>• Telemarketing, Call Prospects Click the Campaign Activity link on the Telemarketing page.</li> <li>• Telemarketing, Record Responses Click the Prospect link on the Find An Existing Prospect page.</li> </ul>	Enter responses to marketing contacts.
Activity Details	RT_AGT_CMPGN_DTL	Telemarketing, Call Prospects, Activity Details	Telemarketing agents can view general information about a telemarketing campaign activity, including the products offered and offer details.
Product Info (product information)	RT_AGT_PROD_INFO	Telemarketing, Call Prospects, Product Info	Telemarketing agents can view detailed information about the offered product.
Record Prospect Responses	RT_AGT_CMPGN_SMRY	Telemarketing, Record Prospect Responses	Record responses received outside of a direct contact (for example, from a response card).

## Viewing Executing Telemarketing Campaigns

Access the Telemarketing page.

Click a campaign activity name to access the Call Prospects page.

## Contacting Prospects

Access the Call Prospect page.

Refresh | Launch Script | Order Capture | 360 360-Degree View | Save and Assign | >> [Personalize](#)

**Activity Name** Telemarketing - Direct Sell **List Count** 9  
**Offer Name** BUY A REFRIGERATOR AND GET FREEZER SHELVES FREE **Calls Remaining** 9

Call Prospect / Activity Details / Products

**Prospect Information**

**Name** Hudson,Michelle **Phone** 516/331-1288(4578)  
**Address** 4435 Pinehurst Rd, New York, NY, 04188, USA **Company**

**Call History**

Provider Group	Agent	Date Created	Status	Call Back Date	Reason	Final Disposition	User Disposition

Dial Prospect
Launch Script
Order Now

Call Prospect page (1 of 2)

**Call Outcome**

**Call Back**  
**Call Back Date**  31 **Time** 12:00AM

---

**No Contact**  
**Reason**

---

**Close**  
**Final Disposition**   
**User Disposition**

**Collateral Details**

*Description	Request Date	Fulfillment History Status	Quantity	
<input type="text"/>	06/08/2006 <span style="font-size: small;">31</span>	Requested	1.0000	<span style="border: 1px solid #ccc; padding: 2px 5px;">Delete</span>

Add Collateral

**Notes**

Save and Assign Next Prospect
Save and Select New Activity

Refresh | Launch Script | Order Capture | 360 360-Degree View | Save and Assign | >> [Top of Page](#)

\* Required Field

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.

---

**Dial Prospect** Click to automatically dial the prospect.

---

**Note.** The Dial Prospect button only works when a CTI (computer telephony interface) system is in use.

---

**Launch Script** Click to launch the script linked to this campaign activity.

**Order Now** Click to access the PeopleSoft Order Capture Entry Form page and enter order details. This button only appears when the integration method selected on the Campaign - Activities detail page is set to *Order Capture Direct* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Send to Order Capture Agent** Click to transfer gathered information to an order capture agent. This inserts a worklist item and sends notification to order capture agents using workflow processing. The telemarketing contact is completed, and the order capture agent completes the order. This button only appears when the integration method selected on the Campaign - Activities detail page is set to *Order Capture Indirect* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Script Name** Displays the name of the script used for the telemarketing call.

**Score** Displays the score achieved by the prospect's answers to script questions. This field only appears when the integration method selected on the Campaign - Activities detail page is set to *Sales Leads* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Lead Rating** The value of this field is automatically determined based on the score of the prospect's response to the script questions. You can override the value. Lead Rating values are defined in the PeopleSoft Sales application setup. The values *Cold*, *Hot*, and *Warm* are delivered with the system. This field only appears when the integration method selected on the Campaign - Activities detail page is set to *Sales Leads* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

**Rating Category** The value of this field is automatically determined based on the score of the prospect's response to the script questions. You can override the value. Values are *Qualified* and *Unqualified*. This field only appears when the integration method selected on the Campaign - Activities detail page is set to *Sales Leads* when the activity is pushed from PeopleSoft Marketing to PeopleSoft Telemarketing.

## Call Outcome

Use options in the Call Outcome group box to record results of this call.

<b>Call Back Date</b>	Select to specify a particular time to call back. Enter the date and time. <hr/> <b>Note.</b> Enter a callback date and time only when requested by the contact. Otherwise, the automatic callback rules return the contact to the caller queue according to the defined rule. <hr/>
<b>No Contact</b>	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.
<b>Close</b>	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 <i>Do Not Call Again</i> , <i>Generate Lead</i> , <i>Not Interested</i> , <i>Pass to Order Capture</i> , <i>Sale</i> , <i>Send Email</i> , and <i>Send Mail</i> . <hr/> <b>Note.</b> Selecting <i>Do Not Call Again</i> places a flag on the prospect's record in the Business Contact table, to prevent future contact through any marketing channel. <hr/>
<b>Disposition</b>	Select a disposition reason from the available options. Disposition reasons are user-defined under the Telemarketing Set Up menu.

## Collateral Details

Use the Collateral Details scroll area to enter collateral materials requested by the call prospect.

---

**Note.** A request for collateral completes a call. You cannot send collateral and assign a callback.

---

<b>Description</b>	Select one of the available collateral items.
<b>Request Date</b>	Enter the date that the fulfillment product is requested. This is typically the day that the call is closed.
<b>Fulfillment History Status</b>	Enter the status of the product fulfillment. Values are: <i>Back Order</i> , <i>Cancelled</i> , <i>Partial</i> , <i>Requested</i> (default value), and <i>Shipped</i> .
<b>Quantity</b>	Enter the fulfillment product quantity requested. The default value is <i>1.0000</i> .

## Notes

The Notes group box displays any notes that have been attached to the campaign activity.

## See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Defining Scripts"

## Entering Responses Received Through Channels Other Than Telemarketing

Access the Record Prospect Responses page.

**Record Prospect Responses**

Blaine, Richard C.

**Campaigns** Find | Download First 1-2 of 2 Last

Campaign Activity	Provider Group	Priority	Start Date	Start Time	End Date	End Time	List Count	Completed Calls
<a href="#">Telemarketing - Direct Sell</a>	Telemarketing East	Medium	10/01/2002	12:00AM	10/01/2010	11:59PM	9	0
<a href="#">Telemarketing - Quality Retail Outlets</a>	Telemarketing East	Medium	10/01/2002	12:00AM	10/01/2010	11:59PM	7	0

Refresh

Record Prospect Responses page

To consolidate responses from campaign activities utilizing channels other than telemarketing, PeopleSoft Telemarketing enables agents to record responses without actually contacting the prospect by telephone. For example, a campaign might employ both telemarketing and direct mail activities. Responses from the direct mail activity are entered into the system manually using the Record Responses component.

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).

See [Chapter 10, “Using PeopleSoft Telemarketing,” Contacting Prospects, page 176.](#)

See [Chapter 10, “Using PeopleSoft Telemarketing,” Contacting Prospects, page 176.](#)



## APPENDIX A

# Using Interactive Reports in PeopleSoft Marketing Applications

This chapter provides an overview of interactive reports and discusses how to:

- Use interactive reports for PeopleSoft Marketing.
- Use interactive reports for PeopleSoft Telemarketing.

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## 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 Telemarketing).
- Lead Quality (PeopleSoft Telemarketing).
- Sales Effectiveness (PeopleSoft Telemarketing).
- Sales Conversion Rate (PeopleSoft Telemarketing).

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**Note.** You must have Microsoft Internet Explorer 5.1 or higher to access interactive reports.

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**See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Using Interactive Reports”

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## Using Interactive Reports for PeopleSoft Marketing

This section discusses how to:

- View key performance measurements.
- Perform what-if scenarios.
- Establish assumptions.

### Page Used to Use Interactive Reports for PeopleSoft Marketing

Page Name	Object Name	Navigation	Usage
Campaign Performance / Forecast Analysis	RA_WHATIF_UPD	Marketing, Interactive Reports, Campaign Performance Forecast 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.
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.

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.

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.

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.

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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.

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**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.

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See *PeopleSoft Enterprise CRM 9 Supplemental 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.

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**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.

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- 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

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## Using Interactive Reports for PeopleSoft Telemarketing

This section discusses how to:

- View lead status.
- Evaluate lead quality.
- Measure script completion.
- Measure completed sales.

## Pages Used to Use PeopleSoft Telemarketing Interactive Reports

Page Name	Object Name	Navigation	Usage
Lead Acceptance	RT_LEAD_ACCEPT_UPD	Telemarketing, Interactive Reports, Lead Acceptance	See if leads have been accepted or rejected.
Lead Quality	RT_LEAD_QUAL_UPD	Telemarketing, Interactive Reports, Lead Quality	Compare telemarketing agent and sales representative lead quality ratings.
Sales Effectiveness	RT_SALES_EFFEC_UPD	Telemarketing, Interactive Reports, Sales Effectiveness	Determine if telemarketing agents are completing their scripts.
Sales Conversion Rate	RT_SALES_CONV_UPD	Telemarketing, Interactive Reports, Sales Conversion Rate	View completed sales for prospects transferred to order capture.

### Viewing Lead Status

Access the Lead Acceptance page.

View how many of the leads that have been passed from telemarketing agents to sales representatives have been accepted or rejected, and how many are yet to be acted upon.

### Results Measured

The Lead Acceptance interactive report measures:

- Leads passed from telemarketing to sales.
- Leads accepted by sales representatives.
- Leads rejected by sales representatives.
- Leads pending (not yet accepted or rejected).
- Percent of passed leads accepted.
- Percent of passed leads rejected.
- Percent of passed leads pending.

### Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.
- Telemarketing territory.
- Telemarketing team.
- Telemarketing agent.
- Week.

## Evaluating Lead Quality

Access the Lead Quality page.

Compare the quality rating of a lead as determined by the telemarketing agent with the rating determined by a sales representative. This enables you to determine if there are discrepancies between the lead quality ratings given by telemarketers versus those of sales representatives. By analyzing results using different dimensions, you can identify problems at any level.

The report does not reveal if leads are over or under rated, but only that there are differences.

### Results Measured

The Lead Quality interactive report measures:

- Leads passed from telemarketing to sales
- Leads the lead quality rating determined by the telemarketing agent matches that of the sales representative.
- Percentage of passed leads were the lead quality rating matches.

### Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.
- Telemarketing territory.
- Telemarketing team.
- Telemarketing agent.
- Sales representative.
- Week.
- If the lead has been accepted or rejected by the sales representative.

## Measuring Script Completion

Access the Sales Effectiveness page.

Determine if telemarketing agents are able to complete scripts during their telemarketing calls. The report measures script completion for closed calls only.

### Results Measured

The Sales Effectiveness interactive report measures:

- Closed prospects.
- Percent of closed calls with scripts completed.
- Percent of closed calls with scripts partially completed.
- Percent closed calls with scripts not started.

## Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.
- Telemarketing team.
- Telemarketing provider group.
- Week.

## Measuring Completed Sales

Access the Sales Conversion page.

View how many prospects transferred to order capture actually result in completed sales. The report only analyzes calls from telemarketing activities where the activity integration method is set to order capture direct or order capture indirect. Results are not measured until the call has been closed by the telemarketing agent.

## Results Measured

The Sales Conversion interactive report measures:

- Closed prospects.
- Percent sale completed.
- Percent pending sale (sale not yet completed).
- Percent no sale.

## Available Dimensions

Results can be measured by:

- Business unit.
- Campaign.
- Activity.
- Telemarketing team.
- Telemarketing agent.
- Week.



## APPENDIX B

# PeopleSoft Marketing Reports

This appendix provides an overview of PeopleSoft Marketing reports.

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**Note.** For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with the documentation.

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### See Also

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*

*Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications*

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## 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.	Marketing, Operational Reports, Campaign and Activity Effectiveness	RUN_RAC1002
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

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
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.	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
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 telemarketing campaign.	Telemarketing, Reports, Campaign Counts Report	RUN_RCOM01
RUN_RCOM02 Team Counts	This report shows all counts for a telemarketing team.	Telemarketing, Reports, Team Counts Report	RUN_RCOM02

# Glossary of PeopleSoft Enterprise Terms

<b>absence entitlement</b>	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>academic career</b>	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
<b>academic institution</b>	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
<b>academic organization</b>	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
<b>academic plan</b>	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
<b>academic program</b>	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
<b>accounting class</b>	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
<b>accounting date</b>	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
<b>action reason</b>	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
<b>action template</b>	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
<b>activity</b>	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
<b>address usage</b>	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
<b>adjustment calendar</b>	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
<b>administrative function</b>	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
<b>admit type</b>	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
<b>agreement</b>	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
<b>allocation rule</b>	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
<b>alternate account</b>	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
<b>analysis database</b>	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

<b>Application Messaging</b>	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
<b>AR specialist</b>	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
<b>arbitration plan</b>	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
<b>assessment rule</b>	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attribute/value pair</b>	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
<b>audience</b>	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
<b>authentication server</b>	A server that is set up to verify users of the system.
<b>base time period</b>	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
<b>benchmark job</b>	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>billing career</b>	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
<b>bio bit or bio brief</b>	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
<b>book</b>	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met.

For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

<b>budget period</b>	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
<b>business activity</b>	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
<b>business event</b>	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.  In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
<b>business process</b>	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.  See also <i>detailed business process</i> .
<b>business task</b>	The name of the specific function depicted in one of the business processes.
<b>business unit</b>	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
<b>buyer</b>	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
<b>campus</b>	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
<b>catalog item</b>	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
<b>catalog map</b>	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
<b>catalog partner</b>	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
<b>categorization</b>	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
<b>category</b>	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
<b>channel</b>	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
<b>ChartField</b>	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>checkbook</b>	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
<b>checklist code</b>	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
<b>class</b>	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.  See also <i>course</i> .
<b>Class ChartField</b>	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
<b>clearance</b>	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
<b>clone</b>	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
<b>cohort</b>	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.  See also <i>population</i> and <i>division</i> .
<b>collection</b>	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
<b>collection rule</b>	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
<b>comm key</b>	See <i>communication key</i> .
<b>communication key</b>	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i> ) can be created for background processes as well as for specific users.

<b>compensation object</b>	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>component interface</b>	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
<b>condition</b>	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
<b>configuration parameter catalog</b>	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
<b>configuration plan</b>	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
<b>constituents</b>	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
<b>content reference</b>	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
<b>context</b>	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.  In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.  In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
<b>control table</b>	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
<b>cost-plus contract line</b>	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
<b>cost profile</b>	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.
<b>course</b>	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

<b>course share set</b>	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
<b>current learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
<b>data acquisition</b>	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
<b>data cube</b>	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
<b>data elements</b>	Data elements, at their simplest level, define a subset of data and the rules by which to group them.  For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
<b>dataset</b>	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
<b>delivery method</b>	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.  In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
<b>delivery method type</b>	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
<b>detailed business process</b>	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
<b>dimension</b>	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
<b>directory information tree</b>	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

<b>division</b>	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.  See also <i>population</i> and <i>cohort</i> .
<b>document sequencing</b>	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
<b>dynamic detail tree</b>	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
<b>edit table</b>	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
<b>effective date</b>	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
<b>EIM ledger</b>	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
<b>elimination set</b>	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
<b>entry event</b>	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
<b>equitization</b>	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
<b>equity item limit</b>	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
<b>event</b>	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.  In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
<b>event propagation process</b>	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
<b>exception</b>	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

<b>exclusive pricing</b>	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
<b>fact</b>	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
<b>financial aid term</b>	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
<b>forecast item</b>	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
<b>fund</b>	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
<b>gap</b>	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
<b>generic process type</b>	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
<b>gift table</b>	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
<b>GL business unit</b>	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.  See also <i>business unit</i> .
<b>GL entry template</b>	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
<b>GL Interface process</b>	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
<b>group</b>	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).  In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to

	run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
<b>incentive object</b>	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.
<b>incentive rule</b>	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
<b>incur</b>	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
<b>initiative</b>	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
<b>inquiry access</b>	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.  See also <i>update access</i> .
<b>institution</b>	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
<b>integration</b>	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
<b>integration point</b>	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
<b>integration set</b>	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
<b>item</b>	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).  In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
<b>item shuffle</b>	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

<b>joint communication</b>	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
<b>keyword</b>	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
<b>KPI</b>	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
<b>LDIF file</b>	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
<b>learner group</b>	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
<b>learning components</b>	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
<b>learning environment</b>	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
<b>ledger mapping</b>	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
<b>library section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
<b>linked section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
<b>linked variable</b>	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
<b>LMS</b>	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a

common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

<b>load</b>	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
<b>local functionality</b>	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
<b>location</b>	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
<b>logistical task</b>	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
<b>market template</b>	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
<b>mass change</b>	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.  See also <i>3C engine</i> .
<b>match group</b>	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
<b>MCF server</b>	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
<b>merchandising activity</b>	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
<b>meta-SQL</b>	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs.
<b>metastring</b>	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
<b>multibook</b>	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single

	transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.
<b>national allowance</b>	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
<b>need</b>	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
<b>node-oriented tree</b>	A tree that is based on a detail structure, but the detail values are not used.
<b>pagelet</b>	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
<b>partner</b>	A company that supplies products or services that are resold or purchased by the enterprise.
<b>pay cycle</b>	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
<b>payment shuffle</b>	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
<b>pending item</b>	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
<b>PeopleCode</b>	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
<b>PeopleCode event</b>	See <i>event</i> .
<b>PeopleSoft Pure Internet Architecture</b>	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
<b>performance measurement</b>	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
<b>period context</b>	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

<b>person of interest</b>	A person about whom the organization maintains information but who is not part of the workforce.
<b>personal portfolio</b>	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
<b>plan</b>	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
<b>plan context</b>	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
<b>plan template</b>	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
<b>planned learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
<b>planning instance</b>	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
<b>population</b>	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.  See also <i>division</i> and <i>cohort</i> .
<b>portal registry</b>	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
<b>price list</b>	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
<b>price rule</b>	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
<b>price rule condition</b>	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
<b>price rule key</b>	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

<b>primacy number</b>	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
<b>primary name type</b>	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
<b>process category</b>	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
<b>process group</b>	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
<b>process job</b>	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
<b>process request</b>	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
<b>process run control</b>	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
<b>product</b>	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
<b>product category</b>	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
<b>product family</b>	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
<b>product line</b>	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
<b>programs</b>	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

<b>progress log</b>	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
<b>project transaction</b>	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
<b>promotion</b>	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
<b>prospects</b>	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.  In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>rating components</b>	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
<b>record group</b>	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
<b>record input VAT flag</b>	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
<b>record output VAT flag</b>	Abbreviation for <i>record output value-added tax flag</i> .  See <i>record input VAT flag</i> .
<b>recname</b>	The name of a record that is used to determine the associated field to match a value or set of values.
<b>recognition</b>	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
<b>reference data</b>	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
<b>reference object</b>	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

<b>reference transaction</b>	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
<b>regional sourcing</b>	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>remote data source data</b>	Data that is extracted from a separate database and migrated into the local database.
<b>REN server</b>	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
<b>requester</b>	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
<b>reversal indicator</b>	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
<b>role</b>	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
<b>role user</b>	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>run control</b>	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.
<b>run-level context</b>	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
<b>SCP SCBM XML message</b>	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
<b>search query</b>	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
<b>search/match</b>	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

<b>seasonal address</b>	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
<b>section</b>	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>serial genealogy</b>	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
<b>serial in production</b>	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
<b>service impact</b>	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
<b>service indicator</b>	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
<b>session</b>	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
<b>session template</b>	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>share driver expression</b>	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
<b>single signon</b>	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

<b>source key process</b>	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
<b>source transaction</b>	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
<b>speed key</b>	See <i>communication key</i> .
<b>SpeedChart</b>	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>staging</b>	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
<b>standard letter code</b>	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>storage level</b>	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
<b>subcustomer qualifier</b>	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
<b>Summary ChartField</b>	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
<b>summary ledger</b>	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
<b>summary time period</b>	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
<b>summary tree</b>	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
<b>syndicate</b>	To distribute a production version of the enterprise catalog to partners.

<b>system function</b>	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
<b>system source</b>	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
<b>TableSet</b>	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
<b>TableSet sharing</b>	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>tax authority</b>	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
<b>template</b>	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
<b>territory</b>	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>third party</b>	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
<b>3C engine</b>	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
<b>3C group</b>	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
<b>TimeSpan</b>	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Enterprise Projects.

<b>trace usage</b>	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
<b>transaction allocation</b>	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
<b>transaction state</b>	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
<b>Translate table</b>	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
<b>tree</b>	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
<b>tuition lock</b>	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i> ) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
<b>unclaimed transaction</b>	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
<b>universal navigation header</b>	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
<b>update access</b>	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.  See also <i>inquiry access</i> .
<b>user interaction object</b>	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
<b>variable</b>	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
<b>VAT exception</b>	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
<b>VAT exempt</b>	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

<b>VAT exoneration</b>	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
<b>VAT suspension</b>	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
<b>warehouse</b>	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
<b>work order</b>	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
<b>worker</b>	A person who is part of the workforce; an employee or a contingent worker.
<b>workset</b>	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
<b>worksheet</b>	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
<b>worklist</b>	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
<b>XML link</b>	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
<b>XML schema</b>	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
<b>XPI</b>	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.
<b>yield by operation</b>	In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
<b>zero-rated VAT</b>	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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