Oracle® Fulfillment Services

Users Guide

Release 11*i*

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Oracle Fulfillment Services Users Guide, Release 11*i*

Part No. A97622-01

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Oracle Fulfillment Services Users Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Fulfillment Services Users Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Fulfillment Services

- The Oracle Applications graphical user interface.

    To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Fulfillment Services.

- Chapter One provides an Introduction to Oracle Fulfillment Services.

- Chapter Two is a description of the Home Page and how to get started with Fulfillment Services

- Chapter Three covers creating and managing templates for fulfillment distribution.

- Chapter Four provides instruction on creating and processing a fulfillment request.

- Chapter Five covers management of lists.

- Appendix A is a list of acronyms related to fulfillment processing.

- Appendix B is a list of terms associated with fulfillment processing.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Fulfillment Services.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Fulfillment Services shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Fulfillment Services.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications Users Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Fulfillment Services (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Marketing Online Users Guide

This guide provides in depth information for the Audience tab and the Deliverables subtab.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle may offer training courses to help you and your staff master Oracle Fulfillment Services and reach full productivity quickly. You have a choice of

educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Fulfillment Services working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus$^{®}$, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as

SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Introduction to Oracle Fulfillment Services

1.1 Introduction

Fulfillment is defined as an automated way to send information to customers. It provides the ability to immediately satisfy a customer's request for information, literature, and other correspondence. For example, Customer Service Representatives handle a variety of requests ranging from product and service inquiries, pricing questions, billing inquiries, and general customer case issues. Many of these requests will result in dissemination of literature, collateral, forms of application, letters or correspondence to the customer. Oracle Fulfillment Services provides the ability for call center administrators, mobile field representatives, marketing managers, customer care representatives, and other service agents to respond to different customer needs quickly and easily using email and a physical channel through Oracle Order Capture.

1.2 Key Features

- Provides automated delivery of information to customers via email.

- Supports multiple types of customized fulfillments used in Oracle Applications.

- Supports scheduling, prioritizing, cancelling, rescheduling of fulfillment requests.

- Ability to recreate and resend preselected fulfillment that was sent in the past.

- Character set support for multiple languages.

- Online content, query creation and management. This powerful feature allows a user to create templates with merge fields and preview the created content.

- Scalable, fault tolerant architecture that balances load among multiple fulfillment and SMTP servers.

- Optionally tracks when email messages are opened by the end user.

- Collects statistics on malformed messages.

- Ability to mail multiple documents. Ability to send multi-part email messages.

- Optionally updates customer information stored in Interaction History.

- Supports customized email content based on queries of the organization's TCA data.

- Provides a convenient interface for the managing and monitoring of fulfillment requests.

- Supports standard unsubscribe and suppression functionality similar to Oracle Marketing Online.

1.3 Fulfillment Users

Customer service representatives or agents handle a variety of requests ranging from product and service inquiries, pricing questions, billing inquiries, and general customer care issues. Many of these requests will result in some dissemination of literature, collateral, forms of application, or correspondence to the customer.

By using Fulfillment Services, sales and marketing representatives, interaction center agents, and service or support personal can focus on each customer's unique fulfillment requirements on a one-to-one basis without spending time managing fulfillment output.

An agent using fulfillment can send out information to prospective customers that include product announcements, newsletters, lead generation and qualification campaigns, and customer service requests. Fulfillment can also be used as the mechanism to send out marketing information through marketing campaigns, like email blitzes.

1.4 Fulfillment Servers

Fulfillment servers are used to monitor fulfillment requests. Servers are created with a name and description and include a shut down time.

A fulfillment server administrator (or someone who has been designated as the server administrator) has the ability to create a new server, update an existing server, or restore server attributes for an existing server.

1.5 Content

Content is a combination of any or all of the following:

- Text

- Graphics

- Merge fields for customized email

- Attachments

1.6 Queries

A query is a SQL (Structured Query Language) statement which collects specific kinds of data from the database when fulfilling a request. From the query subtab, you can create, update, or restore queries.

Queries are used for generating and populating data in the content automatically, through a merge facility. The available fields from the selected query are listed on the Template page.

The first step in creating a query involves identifying the sources needed for the query. The query provides merge fields for customizing an email content to its intended recipient.

A single query may be associated with more than one template providing that the merge field names match the database column names and there is a one-to-one correspondence between the number of merge fields and the number of columns queried in the SQL statement.

1.7 Key Concepts and Definitions

Fulfillment Server Group

A Fulfillment Server Group is a group of server instances which process fulfillment requests. Users and roles are assigned to Server Groups for processing of requests. A Server Group processes the requests of its assigned users and roles before processing other queued requests.

Fulfillment Server

A Fulfillment Server is an instance of the request processing software. This is a standalone java server that's responsible for merging dynamic content into the templates to create customized email message for each recipient.

Mail Profiles

Mail profiles determine many aspects of the outbound email, such as sender's name, sender's domain, reply address, non-delivery address and whether statistics are collected.

Email Server

These are the SMTP protocol implementations supporting the popular email servers such as sendmail, LSMTP, and qmail. These are responsible for sending the emails generated by the fulfillment servers to the intended recipients.

Templates

Templates are the uncustomized emails which are constructed, generally, as a mixture of text and graphics in HTML format. A template is merged with an associated query during request processing to create customized emails.

Query

A query is a SQL statement which generates selected data from a database. A query serves two purposes. The first is to determine which records meet the defined criteria. The second is to determine which fields of those records are returned. The returned data is merged with a template to create a customized email for each recipient.

1.8 Key Benefits

As a key application of the Oracle eBusiness Suite, Oracle Fulfillment Services offers the following benefits:

- Automate processes – By providing centralized processes and approval management, Oracle Fulfillment Services enables an organization to focus more on marketing and less on logistics.

- Enable multi-channel execution – Via seamless integration with other Oracle CRM products, a marketer can use Oracle Fulfillment Services to plan and execute campaigns across all channels and marketing media.

- Increase velocity – Oracle Fulfillment Services increases personal productivity while facilitating team collaboration and information sharing. Marketers can plan and execute campaigns in an accelerated time frame to gain a first mover advantage.

- Become a profit center – Because campaigns and offers are tracked across the E-Business Suite, Oracle Fulfillment Services enables marketers to pinpoint the revenue generated by each marketing effort.

- Maximize Return on Investment (ROI) – Since costs and revenue can be tracked on a real-time basis, marketers can tweak or even stop a campaign in midcourse to maximize the marketing ROI.

1.9 Processes

The processes covered by the remainder of this guide are:

- Using the Home Page

- Creating Content

- Creating a Query

- Creating Deliverables of Marketing Collateral

- Configuring Servers

- Issuing Requests and Reviewing the Results

- Creating, Editing, Viewing and Importing Lists

- Using the Calendar

This chapter provides an overview of the user interface and the major tasks you can perform using Oracle Fulfillment Services.

Each section provides: references to other documents, prerequisites, responsibilities, navigation, steps, guidelines, and some document references useful in accomplishing the goal or task of the section.

1.10 Accessing Oracle Fulfillment Services

Open your browser and enter the URL for the location of Oracle HTML Applications at your organization. Sign on to login page using the Username and the Password provided to you.

Upon verification of your Username and Password, the home page of your primary application will be displayed. If Fulfillment Services is your primary application, you will be ready to access the functionality of Fulfillment Services. Otherwise, click the link for Fulfillment Services to display the home page for Fulfillment Services.

From the home page, click on the desired tab to begin a task. Tasks that can be performed using Oracle Fulfillment Services are detailed in later chapters.

Prerequisites

None

Responsibility

Fulfillment Services User or

Fulfillment Services Administrator

Steps

1. Log into Oracle HTML Applications using the login and password provided to you.

2. If Fulfillment Services is not your primary application, click the link to Fulfillment Services to access the home page.

1.11 Summary of Oracle Fulfillment Services Tasks

Use Oracle Fulfillment Services to perform the following types of tasks:

- Create Content

- Add Attachments

- Define a Query

- Create Deliverables

- Configure fulfillment and email servers

- Create a fulfillment request

- Cancel or reschedule a request

- View the fulfillment request results

- View, edit or import a list

- Make an entry on the calendar

- Create a task

- Add deliverables

2

The Home Page

The home page for Fulfillment Services is the beginning point for accessing the tabs which will be used to perform the tasks in FulFillment Services. The home page also gives you access to Tools and News.

2.1 Overview

This chapter covers:

- The Home page
- The Tools subtab
- The News subtab

2.2 The Home Page

The home page is the starting point for Fulfillment Services. From the home page you may access the following tabs:

- Content
- Administration
- Fulfillment
- Audience
- Calendar

Click on the Content tab to create email content, add components and attachments, create a query or design a deliverable.

Click on the Administration tab to define and organize the organization's fulfillment and email servers for the purposes of using Oracle Fulfillment Services.

Click the Fulfillment tab to define and execute an fulfillment request. The results of executed requests are viewable here.

Click the Audience tab to view and create lists and to import lists.

Click the Calendar tab to create or edit calendar entries and to enter or modify notes and tasks.

You may also click on the Tools or News subtabs on the Home page.

2.3 Home Page Summary Listing

The home page has several bins and reports that may be configured to suit your work style.

The first bin lists your fulfillment requests for up to the last n days. These requests are shown with the subject of the request, the number of items sent, the number of items Malformed, Opened and Unsubscribed.

The second bin is a chart showing your Email Marketing Campaigns for up to the last n days.

The third bin is a chart showing emails sent and email blasts performed over a period of time.

Each of these bin is editable by clicking in the edit button on the upper right corner of the bin.

3

Fulfillment Requests

Fulfillment Requests are processed from the Fulfillment tab. On this tab you initiate requests as well as view charts and graphs of the progress of your requests.

3.1 Summary Page

The Summary page of the Fulfillment tab displays a table of requests. From this table you may see the Request ID, a subject line of the request, the Requestor, the status of the request, the expiration of the request and the options to cancel, reschedule or preview the request.

Click the drop-down list of Views to select a saved search of Fulfillment Requests. In this manner, different lists of Fulfillment Requests, may be created and saved.

From the Summary Page, click Create Fulfillment to initiate a Fulfillment Request.

3.2 Personalizing the Fulfillment Summary Page

The Fulfillment Summary page may be personalized to display various columns of information relating to Fulfillment Requests as well as filter available Fulfillment Requests. These searches may be saved for future use making it easy to switch from chronological list of Fulfillment Requests to a list of cancelled requests.

Prerequisites

None

Steps

1. Navigate to Fulfillment > Personalize.

2. The current search is displayed in the Saved Searches on the Advanced Search page. You have the option to make changes to the displayed search or to save your changes as a new search.

3. To change the Search Criteria, click Modify Criteria and select from any or all of the following criterion:

   ■ End Date Time

   ■ Request ID

   ■ Requestor

   ■ Scheduled Date

   ■ Start Date Time

   ■ Status

   Click Update to save your changes.

4. The criteria selection fields will appear on the Advanced Search page. Enter information as noted below for each criterion:

   ■ For the Requestor, click Go to select a requestor. This will limit the requests displayed to those of the selected requestor.

   ■ For the Request ID, select a comparison value of contains, ends with, is, or starts with, and then enter a value.

   ■ For Scheduled Date, select a comparison operator of Less Than (<), Less Than or Equal To (<=), Equal To (=), Greater Than (>), Greater Than or Equal To (>=) or Between. Select a date in the next field. If the Between comparison operator is selected, select a date in the second date field.

   ■ For Scheduled Start Date Time, select a comparison operator of Less Than (<), Less Than or Equal To (<=), Equal To (=), Greater Than (>), Greater Than or Equal To (>=) or Between. Select a date in the next field. If the Between comparison operator is selected, select a date in the second date field.

   ■ For End Date Time, select a comparison operator of Less Than (<), Less Than or Equal To (<=), Equal To (=), Greater Than (>), Greater Than or Equal To (>=) or Between. Select a date in the next field. If the Between comparison operator is selected, select a date in the second date field.

   ■ For Status, select from: Cancelled, Deferred, Failure, In Progress, Partial Success, or Success.

5. In the Display Options section, select from the following Available Columns to Display. Highlight the Column title in the Available list and click > to move that column to the Displayed list.

   - Request ID
   - Subject
   - Requestor
   - Status
   - Expires On
   - Start Date Time
   - End Date Time
   - Total Entries
   - Cancel Request
   - Preview
   - Reschedule
   - Cancelled Date
   - Scheduled Time
   - Scheduled Date

   Use the up or down buttons to rearrange the Display Column list.

6. Select a sorting order by selecting up to three of the following and selecting whether that field should be sorted ascending or descending.

   - Request ID
   - Subject
   - Requestor
   - Total Entries
   - Scheduled Date
   - Scheduled Time

7. Enter the number of rows that should be displayed.

8. If this search is to be a new search, enter a new search name in the Search Name field.

9. If this search should be used to create the default Summary page, then select the Use as Overview Page Default.

10. Click Save to save the changes or Save and Apply to save the changes to refresh the Summary Page with the new search.

3.3 Creating a Fulfillment Request

The Fulfillment Request is how email fulfillment is generated. The request combines an existing template or a new cover letter with the information from the selected query and sends the fulfillments to the selected list.

Prerequisites
None

Login
Log in to Oracle HTML Applications

Responsibility
Fulfillment User

Fulfillment Administrator

Navigation
Fulfillment > Create Fulfillment

Steps
1. The Requester's Name will be filled in with the logged in user's name. Change if the requester is not the same as the user.

2. The Preferred Send Date will be filled in with today's date and time. Change the date or time or both if the request should be processed in the future.

3. Select a Mail Profile from the drop down list. If no Mail Profiles are on the list. Cancel out and create one on the Administration tab or contact your fulfillment administrator to create one for you.

4. Enter a Subject. This subject becomes the title of the fulfillment request.

5. In the Recipients section select from:

- List. These are static lists of recipients which are created and managed on the Audience tab. The Audience tab will be visible if Oracle Marketing Online has been implemented.

- Parties. This selection allows you to select entries from the HZ_parties tables of TCA (Trading Community Architecture).

- Email Addresses. This selection allows you to enter email addresses from your desktop.

6. In the Content section, elect to use either an existing template or to create new cover letter during the process of creating a Fulfillment Request. In either case, be sure to select a query to go with the template or cover letter.

   To select a query click the icon to the right of the Query field. Select a query from the list by clicking the radio button next to the desired query and click the select button to select the query and close the window.

7. Click Continue.

8. The General section should be complete with the Requestor, Sender, Reply To and Subject information from the previous page.

9. In the Recipients section:

   - If List was selected on the previous page, click the icon next to the List field and select the appropriate list.

   - If Parties was selected on the previous page, click the icon next to the Parties field and select an appropriate party.

   - If Email Addresses was selected on the previous page, enter the email addresses, separated by a comma, a semi-colon or a space, in the Email Addresses field.

10. If Use Existing Template was selected, click the icon next to the Template field to select an existing template.

11. If Create New Cover Letter was selected, create the cover letter, adding Collaterals and Attachments as appropriate. See Creating a New Template for more information on creating a cover letter. See Content Formatting Commands for more information on the content creation window.

12. Click Preview to view a sample of the fulfillment.

13. Click Submit to begin the processing of the fulfillment.

3.4 Cancelling a Request from the Fulfillment Summary Page

A request may only be cancelled if it is not begun processing. A request that has not started processing has a status of Deferred.

Prerequisites

A cancellable request

Steps

1. From the Fulfillment Summary page, click the icon in the Cancel column of the request to be cancelled.

2. A confirmation message appears confirming the cancellation of the request and the status of the request changes from Deferred to Cancelled.

3.5 Previewing a Request from the Fulfillment Summary Page

Click the Preview icon for the Fulfillment Request to display an unformatted sample of the fulfillment. Note that merge fields will be shown in place.

3.6 Rescheduling a Request from the Fulfillment Summary Page

A request may only be rescheduled if it is not begun processing. A request that has not started processing has a status of Deferred.

Prerequisites

A request which can be rescheduled.

Steps

1. From the Fulfillment Summary page, click the icon in the Reschedule column of the request to be rescheduled.

2. On the Reschedule page, change the date and time for processing of the request.

3. Click Update to accept the reschedule.

4

Creating and Managing Templates

This chapter details the procedures to create and manage fulfillment templates for Oracle Fulfillment Services. The template forms the message body which will be customized to the intended recipient when merged with information from the selected query.

Templates are designed using a combination of text, graphics, and attachments.

4.1 Overview of the Content tab

The content tab is where you will find your existing email templates listed. From this tab these actions may be taken:

- Creating a New Template

- Adding Deliverables and Attachments to a Template

- Content Formatting Commands

- Viewing Templates

- Previewing a Template

- Generating a sample email

- Personalizing the Template Summary Page

- Changing Views

The following sections detail these tasks.

4.1.1 Creating a New Template

Click Create to display the create template page. Here is where the body of the email will be created and saved. Once the body is saved, attachments and deliverables may be added.

The body of the email may be composed of text or graphics or a combination thereof.

Prerequisites

None

Login

Log in to Oracle HTML Applications

Responsibility

Fulfillment User

Fulfillment Administrator

Navigation

Fulfillment Services > Content > Create Template

Steps

1. Enter a Name for the template. This field is required.

2. If the default owner is not correct, click the icon to display a list of people within the organization. Select an owner for the template.

3. Select a Directory in which to store the template. This field is required and may not be changed once the template is saved. The list of directories is seeded to include directories for:

   - AHL Directory

   - OMO Directory

   - Collaterals

   - Common

   - Content Page

   - Cover Letters

4. Select a Character Set. This field determines the alphabet used to create the email. This field is required and may not be changed once the template is saved.

5. Select whether the template will be constructed in plain text or in HTML.

6. Click the icon next to the Query field to display the Search and Select window. The available queries are displayed in the Results section in alphabetical order. Select a query from the displayed list, or if the desired query is not on the list:

   ■ Search for the query by entering a full or partial name and clicking go.

   ■ Click Next.

   ■ Select a page in the query list to search manually for a query.

   When the desired query is located, click the radio button next to the query name and click the Select button.

   On the Create Template page, the merge field list, located to the right of the content design window, is populated with the fields available from the query.

7. Enter your content in the box on the page. See Content Formatting Commands below.

8. Click Advanced. This saves your template and allows you to proceed with the next section which covers adding components and attachments to your template. If you are not ready to add components and attachments to your template at this time, click Apply to create template and return you to the Template Summary page. To add components and attachments at a later time, click the appropriate link from the Template Summary page to display the template.

4.1.2 Adding Deliverables and Attachments to a Template

Prerequisites
A Template

Responsibility
Fulfillment User

Fulfillment Administrator

Navigation
Fulfillment Services > Content

Steps

1. From a newly created template, Create or edit a template file and scroll down until the Deliverables and Attachments sections are displayed.

    Deliverables are electronic attachments which may be created on the Deliverables subtab in Fulfillment Services or may be created on the Deliverables tab in Oracle Marketing Online.

2. In the Deliverables table, enter a value for the Sequence. For example you may enter a sequence of 1, 2, 3... or a sequence of 10, 20, 30.... There is an advantage to using the second sequence example. If a new element is introduced, its sequence number may be 25 in order to insert it between the number 20 and number 30 without having to renumber all the entries.

3. Click the icon next to the name field to display a list of available Deliverables. Select a Deliverable to add to the Content entered above. Repeat to add additional Deliverables to the Content of the email.

4. In the Attachments table, enter a value for the Sequence. For example you may enter a sequence of 1, 2, 3... or a sequence of 10, 20, 30.... There is an advantage to using the second sequence example. If a new element is introduced, its sequence number may be 25 in order to insert it between the number 20 and number 30 without having to renumber all the entries.

5. Select a Type of Local. Local is the only type supported in this release.

6. Click the icon next to the name field to display a file browser window.

7. Enter a file URL and click Submit to select a file or click Browse to select a file and then click Submit. Repeat to add additional Attachments.

8. Optionally, send a test email to check to Template. To send a test of the Template to a specified recipient, type the recipient's e-mail address in the field provided, then click Send.

9. Click Apply to save the Template.

4.1.3 Content Formatting Commands

There are three font attributes that may be selected:

-   Font. Select a font family from this drop down list.

-   Color. Select a font color from this drop down list.

-   Weight. Select a font size, in points, from this drop down list.

There are a number of tools available to you to edit the content. Many of these icons may be familiar to you and work in the way you expect. Here are how these icons operate.

- The scissors icon is Cut. Click Cut to remove the selected text or graphic and place it on the clipboard.

- The double page icon is Copy. Click Copy to copy the selected text or graphic to the clipboard.

- The clipboard icon is Paste. Click Paste to paste the contents of the clipboard into editing window.

- The capital B icon is Bold. Click Bold to apply bold to the selected text or to begin typing in bold. Click the Bold icon again to turn off typing in bold.

- The capital I icon is Italics. Click Italics to apply italics to the selected text or to begin typing in italics. Click the Italics icon again to turn off typing in italics.

- The capital U icon is Underline. Click Underline to apply underline to the selected text or to begin typing in underlined text. Click the Underline icon again to turn off typing in underlined text.

- The Capital BR icon is Break. Click Break to insert a horizontal line across the body of the email at the point of the cursor. The Break exists on a line by itself and thus will be inserted on a blank line which may created if necessary.

- The left aligned bars icon is Left Justification. Click Left Justification to align the selected text against the left margin or to begin typing in left justification.

- The center aligned bars icon is Center Justification. Click Center Justification to align the selected text in the center of the text box or to begin typing in center justification.

- The right aligned bars icon is Right Justification. Click Right Justification to align the selected text against the right margin or to begin typing in right justification.

- The multi lined icon is Insert Line. Click Insert Line to insert a new line in the text area at the insertion point.

- The numbered lines icon is Numbered Paragraph. Click Numbered Paragraph to apply numbers to the selected paragraphs or to begin typing a numbered paragraph.

- The bulleted lines icon is Bulleted Paragraph. Click Bulleted Paragraph to apply bullets to the selected paragraphs or to begin typing a bulleted paragraph.

- The indented lines icon is Increase Indent. Click Increase Indent to indent the selected paragraphs one half inch to the right or to begin typing an indented paragraph.

- The attended lines icon is Decrease Indent. Click Decrease Indent to move the indented paragraphs one half inch to the left.

- The web link icon is Insert Hyperlink. Select the text that will become the hyperlink and click Insert Hyperlink. Enter the URL for a hyperlink that will be executed when the recipient clicks on the text. The text will be changed to standard hyperlink format which is underlined blue text.

- The camera icon is Insert Image. Position the cursor where an image is to be inserted and click Insert Image. Enter the URL for the image. The image will be inserted the template is previewed or merged.

There is also a checkbox for the HTML Source. Selecting this checkbox will display your entry in HyperText Markup Language.

4.1.4 Viewing Templates

The Template Summary Page is displayed when the Content tab and Template subtabs are accessed. The list of available templates are shown in reverse chronological order with the most recently edited template shown at the top of the list. Clicking the name link will display the details for the template.

The table of templates has the following columns:

- Delete.

- Name. The Name of the template is shown as a link. To display the details for the template, click the name link. Click the name column header to sort the list of templates by Name.

- Query. The query column shows the query associated with a particular template. The query is shown as a link. Click the link to display the query details.

- Base Language.

- Owner.

- Status.

- Directory.

- Preview. Click the preview icon to display a preview screen of the content.

4.1.5 Previewing a Template

A template may be previewed from either the template summary page or from the template details page.

Prerequisites

A template

Responsibility

Fulfillment User

Fulfillment Administrator

Navigation

To preview from the summary page

Fulfillment Services > Content

To preview from the template details page

Fulfillment Services > Content > Template

Steps

To preview from the summary page

1. Click the preview icon of the appropriate template table line to display a preview of it in a separate window.

2. Click the close button to close the preview window.

To preview from the template details page

1. Click the preview button at the top or bottom of the template details page.

2. Click the close button to close the preview window.

4.1.6 Generating a sample email

If you would like to view an email as it looks in an email client, email a sample to yourself or someone else.

Prerequisites

A template

Responsibility

Fulfillment User

Fulfillment Administrator

Navigation

Content > Template

Steps

1. Display a template you would like to test by clicking on the name link from the Template summary page.

2. Scroll to the bottom of the page to view the Test Mail section.

3. Enter an email address in the Send Test To field and click Send.

4. The email will be formatted and mailed, although the merge fields will be blank.

4.1.7 Personalizing the Template Summary Page

The Template Summary Page may be personalized to you so that only the columns you want to see are shown and the items in the table are sorted the way you want them. You may save these layouts as Views and switch among them to see the information in the most appropriate format.

Prerequisites

None

Navigation

Content > Template > Personalize

Steps

1. Select a Status from the column.

2. Using the buttons in the center of the Display Options columns select the columns to be displayed.

3. Select the sort criteria. For example, in one view you may wish to see the most recently used templates. In another view you may wish to see the templates in alphabetical order.

4. Give the view a name and click Save or Save and Apply depending on whether you want to see the results of the view immediately. To see a particular view when accessing the Template Summary Page, select the Use as Overview Page Default checkbox before clicking Save.

4.1.8 Changing Views

On the Template summary page, change your view by selecting a new view from the Views drop-down list and clicking Go.

4.1.9 Finalizing the Template

When all additions and changes have been made to the template, the status must be changed to Available in order to make it available for use. Once a template's status is changed to Available, it may not be modified.

4.2 Queries

This section details the procedures for creating and using queries.

What is a query?

Think of a query as a question you ask of your data. Simple queries might be something like: which people in New York City purchased an item online in the past year, or select customers with graduate degrees and at least two children.

The database takes the question and returns set of records in response. The question actually has two parts. The first part is the selection of records. The second is how to sort the records and which fields do you actually need to see. For example, selecting on the State of New York is a selection criteria, but would not be used in the construction of an email.

Structured Query Language

Structured Query Language or SQL, pronounced sequel, is a standardized language for asking a question of a database. It is a language that uses key or command words and criteria to generate a set of records.

The realm of SQL is too large to discuss fully here, but there are some key words you will begin to recognize in SQL statements when you see them.

- **Select**. The select key word specifies which fields should be returned by the query. For example, SELECT first name, last name, city, state.

- **From**. The from key word specifies the tables where the select statement should look for its fields. For example, FROM Name and Address Table.

- **Where**. The where key word specifies the criteria for selecting the records. For example, WHERE Last Name = "Smith".

- **Order**. The order key word specifies a sorting field and direction. The direction is assumed to be ascending unless prefaced by a DESC key word in which case the direction is descending. For example, ORDER DESC by purchase date which returns records in the order of the most recent purchases.

4.2.1 Creating Queries

Creating queries for email lists can be challenging, and because of the potential for error, this is best left to skilled database analysts and administrators.

When asking for assistance with creating a query, have your question well thought out and include:

- All selection criteria. This would include the information and the operands for comparison. For example, State = New York, Children >= 2, and Highest Grade Attained < 13, will return only high school graduates in New York state who have two or more children.

- All fields to be returned. For example, First Name, Last Name, Street Address, Number of Cars owned, Highest Grade Attained, and email address. These fields will become the available merge fields for creating the body of the email.

- Sorting Order. These are the fields on which the records should be sorted and the direction, if descending, for each sort. For example, sort first by state and then by city and then by last name.

4.2.2 Entering a Query

Creating a query in Fulfillment Services requires just a few pieces of information.

Perquisites
None

Responsibility

Fulfillment Services User

Fulfillment Services Administrator

Navigation

Content > Query > Create Query

Steps

1. Enter a name for the query.

2. Enter a description.

3. Enter the text of the SQL statement. If you received the text of the SQL statement from another source, copying and pasting the text directly into this field will minimize the possibility of introducing errors.

4. Click Create to save your query.

Query Limitations

The Email Address column must be named: emailaddress

The Fax Address column must be named: faxaddress

The columns BLOB and CLOB must not be selected in the query

There must not be spaces in the columns aliases, for example: "Customer Name"

4.2.3 Finalizing the Query

When all additions and changes have been made to the query, the status must be changed to Available in order to make it available for use. Once a query's status is changed to Available, it may not be modified.

4.3 Deliverables

The Deliverables subtab displays the Deliverables pages from Oracle Marketing Online only if Marketing Online has been implemented.

The Deliverables subtab provides a place to create and organize your deliverables which may then be added to the email content created under the Template subtab. Deliverables for Fulfillment Services must be of electronic delivery type in order to be sent in email format.

4.3.1 Creating a Deliverable

A deliverable becomes part of the body of the email when added to a template.

Prerequisites

None

Navigation

Content > Deliverable > Create

Steps

1. Select a Setup Type from the drop-down list. These setup types will be created for you. In order to add content to the deliverable, select a type created specifically for email use.

2. Enter a Name for the deliverable.

3. Enter a Version.

4. Select a Language. This is the Language in which any text in the deliverable will appear.

5. Select a Category from the drop-down list. These categories have been created for you.

6. Select a Subcategory from the drop-down list if one is available. These subcategories have been created for you.

7. Select a Delivery Medium. The default is Electronic. Only deliverables with electronic delivery mediums are available to send via email.

8. Select a Start and End Period from the available accounting periods. These fields are optional.

9. Select Available From and Available To dates.

10. Select a Due Date for the deliverable.

11. Select the Country where the email is going to be delivered.

12. Select a Currency for the Deliverable.

13. Select the Kit? checkbox if this deliverable is to be a kit.

14. Select the Owner of the deliverable if the default owner is not correct.

15. Check the Confidential checkbox to make the deliverable viewable only to its owner.

16. Enter a Description for the deliverable.

17. Click Create to save your deliverable information.

18. The Deliverable Details page will appear. From this page, under the Planning section, you may add:

    ■ Attachments

    ■ Budget information

    ■ Costs

    ■ Metrics

    ■ Email Content

    Under the Collaboration section, you may add:

    ■ Tasks

    ■ Notes

4.3.2 Attaching a file to the Deliverable

Attachments may be added to a Deliverable, however, they will not be added to a fulfillment if the Deliverable is added.

Prerequisites

A file or URL to be attached.

Steps

1. Content > Deliverable > Attachments > Create.

2. Enter a Description.

3. Enter one of the following:

    ■ File. Click the icon to select a file from your desktop or network to add to the Deliverable.

    ■ Text. Enter the text of the attachment.

    ■ URL. Enter a URL to attach to the Deliverable.

4. Click Create.

4.3.3 Obtaining a Budget Source

Click the Budget item on the Side Navigation Menu to fund a Deliverable.

Prerequisites

An existing deliverable

Navigation

Content > Deliverable > Budget

Steps

1. Locate the desired deliverable on the Deliverables summary page.

2. Click on the name link to display the Deliverable Details page for the deliverable.

3. Click Budget on the Side Navigation Menu.

4. Enter a value for the Initial Estimated Budget. Note that the Currency type has already been selected.

5. Click Update to save your changes.

6. Click Create Request to generate a request for funds from the selected budget. Upon approval the amount approved will be available for the deliverable. For more information on Budgets, please see the *Oracle Marketing Online Users Guide.*

4.3.4 Updating Budget Information for a Deliverable

Click the Budget item on the Side Navigation Menu to modify budget information for a Deliverable.

Prerequisites

An existing deliverable

Navigation

Content > Deliverable > Budget

Steps

1. Locate the desired deliverable on the Deliverables summary page.

2. Click on the name link to display the Deliverable Details page for the deliverable.

3. Click Budget on the Side Navigation Menu.

4. Click Create Request to add a new budget request to the deliverable, or click Create Transfer to transfer acquired funds back to the supplying budget, or make changes to the budget details table.

5. Click Update to save your changes.

4.3.5 Adding or Editing Costs

Click on the Costs and Revenues item on the Side Navigation Menu to add or edit costs or revenues to the Deliverable. Revenues may occur when a deliverable is physical and consideration is received for its delivery.

Prerequisites

An existing deliverable

Navigation

Content > Deliverable > Costs and Revenues

Steps

1. Locate the desired deliverable on the Deliverables summary page.

2. Click on the name link to display the Deliverable Details page for the deliverable.

3. Click Costs and Revenues on the Side Navigation Menu. By default the following metrics are associated with new metrics:

   - Total Cost - Deliverables

   - Total Revenue - Deliverables

4. To add a cost or revenue entry, click the icon next to the name field and select the applicable metric. Enter the Forecast and Actual amount. Select a Transaction Date and enter a Description.

5. Click Create.

6. To edit a cost or revenue entry, modify the appropriate entry.

7. Click Update.

For more information on Costs, Revenues and Metrics, please see the *Oracle Marketing Online Users Guide.*

4.3.6 Adding Deliverables to a Kit Deliverable

If a Deliverable is defined as a Kit, then existing deliverables may be added to the kit.

Prerequisites

An existing kit type deliverable

Navigation

Content > Deliverable > Deliverable Kit

Steps

1. Locate the desired deliverable on the Deliverables Summary page.

2. Click on the name link to display the Deliverable Details page for the deliverable.

3. Click Deliverable Kit on the Side Navigation Menu.

4. Click the icon next to the Name field. From the popup window, select a deliverable to add to the kit.

5. Click Update to complete the Name, Version, Language and Available columns.

6. To remove a deliverable, select the Remove checkbox next to the appropriate deliverable and click Update.

5

List Management

Lists are created and managed on the Audience tab of Oracle Fulfillment Services. This tab gives you access to the following subtabs of Oracle Marketing Online:

- List
- Import
- Discoverer
- Search

The List tab displays existing lists and allows the user to manage them.

The Import tab is where lists, such as rented or purchased lists, as well as lists which may exist as database or ASCII files may be imported for use with Fulfillment Services.

The Discoverer tab launches Oracle Discoverer where Lists may be created from existing customer information in the organization's database.

The Search tab enables a user to search through lists for information contained therein.

5.1 The List Summary Page

The summary page of the List subtab displays available lists with some or all of the following columns:

- Name
- Type
- Source Type
- Status

- Owner
- List Size
- Scheduled Generation Date
- Last Generation Date
- Log
- Entry
- Application Name
- Schedule

The display may be customized and saved using the following procedure.

Prerequisites
None

Navigation
Audience > List > Personalize

Steps
1. To change the criteria which will be used for searching, click Modify Criteria and select one or more of the following:

   - Application ID
   - Last Generation Date
   - List Size
   - Name
   - Owner
   - Scheduled Generation Date
   - Source Type
   - Status
   - Type

   Click Update to save your changes.

2. Select a filter to use for your search from the following:

   ■ My Records

   ■ My Team's Records

   ■ All Records

3. Select the columns to be displayed. The available columns are noted above. You may wish to create different searches which have differing sets of columns and sort orders. For example, one search may display the most recently generated lists in chronological order while another might display lists by Status or Owner in alphabetical order.

4. Enter the number of rows to be displayed per page.

5. Give the Search a name and click Save or Save and Apply depending on whether you want to see the results of the view immediately. To see a particular Search, called a View on the Summary Page, when accessing the Template Summary Page, select the Use as Overview Page Default checkbox before clicking Save.

5.2 The List Subtab

The List subtab will appear only if Oracle Marketing Online has been implemented. The List subtab makes available the List, List Import, Discoverer Access and Search functionality available from Marketing Online.

From this subtab lists may be created and maintained. Queries may use a list as a datasource for merging with templates to customize individual emails to their recipients.

Lists are static groups of customers and potential customers. When a list is generated the current information pertaining to the customers and potential customers is collected in a separate table and is now available for marketing activities, including fulfillment.

Segments, which are available only in Marketing Online, are dynamic list generators. They contain the list criteria rather than the list entries themselves. A segment is dynamic because each time a list is generated from a segment it may contain a different set of entries. Please see the *Oracle Marketing Online Users Guide* for more information on lists and segments.

5.2.1 Creating a List

Lists may be created from Fulfillment Services if Oracle Marketing Online has been implemented. Lists are created according to the following steps.

Prerequisites

None

Navigation

Audience > List > Create

Steps

1. Enter a Name for the list.

2. Select a Type from the following:

   - Manual. Entries are added to the list manually by using the Entries item on the Side Navigation Menu.

   - Standard (Default). Entries are primarily added by extraction from the organization's customer and potential customer information.

   - Suppression. This list contains the names that should not be included on other lists. If customers request not to be contacted regarding future purchases, their names are added to a suppression list. When lists are generated, any names that appear on a suppression list are discarded.

3. Select a Source Type. The Source Type is populated by the available Data Sources defined on the Administration tab of Oracle Marketing Online.

4. Status by default is set to Draft.

5. If the default owner is not correct, select from available personnel by clicking the icon at the right of the Owner field.

6. Enter a Description.

7. Click Create.

For further information on Lists, and their generation and management, please see the *Oracle Marketing Online Users Guide*.

5.2.2 List Import

List import allows you to bring lists of customers and prospective customers into the database tables from outside sources. These sources include comma delimited files (*.csv and *.xml files) as well as purchased and rented lists.

Before beginning a list import, you should have an appropriate data source set up in the Administration tab of Oracle Marketing Online. A data source is a data mapping for an established source. If this is a one-time import, you can provide a mapping at the time of import. If the import is being performed on more than 2000 records, it is recommended that the import file be located on the server where database is located.

Follow these steps to complete the List Import wizard. The process begins with defining the import data, then mapping the data, and finally reviewing the import information and importing the data.

Prerequisites

None

Navigation

Audience > Import > Create

Steps

1. Read the preliminary information on the Import Introduction page. Click Next.

2. Select an Import Type of Organizations, Persons, Addresses. The other selections are not appropriate for fulfillment purposes.

3. Enter a Name for the import.

4. Enter a Description.

5. The following file types are support:

   - One *.csv file (easily created in MS Excel or in a text editor)

   - One *.zip file containing one *.csv file

   - One *.zip file containing one *.xml file and one *.dtd file

   Select a Source File location and, if required, supply the path or URL for the data location:

   - Client. Select if the file is located on the local computer. Use the icon to browse for the file.

- Server. Select if the file is located on the server and supply the exact file name.

- FTP. Select if the file is found on a different server location. Use the icon to supply the URL.

6. Select a column delimiter.

7. Select the character which encloses each field entry.

8. Check if a File Header exists. With a *.csv file, the first record will be the File Header.

9. If desired, select a deduplication rule to be used during the import. These deduplication rules will have been defined in Marketing Online. Using a deduplication rule reduces the number of duplicate entries in the organization's customer list.

10. If desired, use Word Standardization. With Word Standardization common abbreviations and nicknames are converted, according to a list, before being compared for the purposes of deduplication. The underlying data is <u>not changed</u>. For example, Bill, Willy and Wm. are converted to William for the purposes of comparing the first name field.

11. Click Next to continue to the Additional Details page.

12. Select a Data Type of either Organizations or Persons.

13. Indicate whether the source is a Purchased List, a Rented List, or other type of list.

14. Select a Vendor for the list if the list was purchased or rented from a known vendor.

15. Enter a cost if appropriate.

16. Select an Expiration Date. This field is required if the list is rented.

17. Enter a Number of Uses. This field is required if the list is rented.

> **Note:** Rented lists will be imported into marketing tables only and may be deleted at a later time. Purchased lists and lists of Other type will become permanent Customer Master records.

18. Click Next to proceed to the Mapping page. On this page you may select from an existing data mapping or create a new mapping with the option of saving the mapping for later use.

19. Click the icon next to Load Existing to select an existing mapping saved from a prior import.

20. To create a mapping, select a field from the Source Fields column and a matching field from the Target Fields column and click > to move the field map into the Mapping column. The Source fields come from the File Header, if any. To remove a field map, highlight it in the Mapping column. and click < to remove it. The following Target Fields are required for the type of data:

- Organizations: Organization Name, Address 1 and Country.
- Persons: First and Last Names, Address 1 and Country.

21. If this is a new mapping and you would like to save the mapping for a future import, enter a name in the Save New Mapping field.

22. Click Next to proceed to the Review page.

23. The Review page displays the information entered in the previous pages, including the field mapping.

24. Select whether the data should be validated as it is imported.

25. If a list is to be generated at the same time as the import is performed, select the Generate a List upon Import checkbox and enter a named in the List Name field.

26. Click Cancel to bail out without performing the import. Click Preview to see a preview of the import results. Click Import to proceed with the import process.

> **Note:** If importing records into the Customer Master, please be aware that these records cannot be deleted once the import is completed.

5.2.3 Discoverer

Clicking on the Discoverer tab will launch Oracle Discoverer if it has been implemented. For information on Discoverer, please see the *Oracle Discoverer Users Guide*.

5.2.4 Search

The Search subtab is used to locate lists containing the specified search information.

Prerequisites
Existing Lists

Navigation
Audience > Search

Steps
1. Select a List Source from the available Data Sources. Data Sources will have been set up for you on the Administration tab of Oracle Marketing Online. Imported lists will have been associated with either the Persons or Organizations Data Source type.

2. Enter search criteria in one or more of the following fields:

   - First Name
   - Last Name
   - Customer Name
   - Pin#
   - Email address
   - Phone number
   - Address
   - City
   - State
   - Zip

3. Click Search to complete the table at the bottom of the page with the following information:

   - List Name
   - Customer
   - Status
   - Gen (Number of entries in the list)

- Last Generation Date
- Type of List

4. Click the List Name link to display the list details for the selected list.

A

Acronyms

This appendix provides a list of acronyms used throughout this Guide. For additional information please see the Glossary in Appendix B.

DNC   Do Not Call. A flag in marketing databases and lists indicating people who do not wish to be contacted.

DNS   Domain Name Service

GUI   Graphical User Interface.

HTML   HyperText Markup Language.

HRMS   Human Resources Management System.

IMAP   Internet Mail Access Protocol

IP   Internet Protocol

JSP   Java Server Page.

LOV   The List of Values is a list that appears in various drop-down fields within OMO. These List of Values can be predefined or created from user entered information.

SMTP   Simple Mail Transfer Protocol

SQL   Structured Query Language. Used to query databases.

URL   Universal Resource Locator

B

Glossary of Terms

This appendix provides a Glossary of Terms used throughout this guide.

Attachment
A file or URL attached to a marketing object.

Audience
The audience tab provides functionality relating to List creation, management and the creation and management of information related to parties external to the organization.

Bind Variable
A Bind Variable is a placeholder for a value in a SQL query.

Customer
A prior purchaser of products or services.

Deliverable
A unit of marketing information to be given to a Customer or Prospect. Deliverables may be in hard form, e.g., a flyer or printed information, or in soft form, e.g., an electronic brochure or email attachment.

Discoverer
Oracle Discoverer is a data mining tool allowing users to query databases without knowing SQL.

Email Server

A SMTP email server is used to deliver email to the Internet.

Field

A unit of data. Data is stored in an array of records and fields. A field on a Page is where data is entered or selected from a LOV.

Fulfillment User

A Fulfillment User is a user which places create email templates or places fulfillment requests for distribution of email through Oracle Fulfillment Services.

Fulfillment Server

A Fulfillment Server is a standalone java server which merges a template with query information to create customized emails. These emails are then sent to the email server.

Home Tab

The Home tab is the first tab the user sees when they log onto Oracle Fulfillment Services. The Home tab contains a number of bins and available reports as well as links in certain bins to recently accessed marketing objects.

Interaction

A touchpoint with a customer or potential customer. Interactions may be recorded in Oracle Interaction History.

IP Address

An Internet Protocol Address is a numeric value which identifies a device connected to or addressed from the Internet.

Link

A hyperlink to another Page.

Mail Profiles

A collection of information used to construct email, such as sender's name, sender's domain, reply address and whether statistics are collected.

Note

A note may be attached to almost any marketing object for many different purposes. Notes, once attached, are not deleteable.

Note Type

These are organization-defined types to used to categorize notes.

Page

A HTML page viewed in a browser.

Partial Success

A status of Partial Success of a Fulfillment Request means that each intended recipient was sent the fulfillment, but that one or more recipients had not received the fulfillment due to incorrect an email address, a full mailbox, or similar issue.

Query

An SQL statement that returns records.

Record

A collection of related Fields. All of the fields in a Record contain data relating to a single item.

Response

Any communication received back from a customer or prospect. Responses may be saved in Oracle Interaction History.

Structured Query Language (SQL)

Sometimes pronounced "Sequel", Structured Query Language is a standard language for querying, or asking questions of, a database.

Subtab

Some tabs have further divisions called subtabs. Subtabs, if any, are displayed horizontally underneath the tabs.

Summary Page

Summary pages, which are a list of marketing objects, appear under many tabs and subtabs. To view a marketing object's details, click the object's name.

Tab

Main divisions within the user interface of Oracle Marketing Online.

Template

A collection of text, graphics and merge fields used to create emails customized to the individual recipient.