

IBM Unica Distributed Marketing  
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## *Field Marketer's Guide*



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IBM Corporation  
Reservoir Place North  
170 Tracer Lane  
Waltham, MA 02451-1379

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# Preface

- [Contacting IBM Unica technical support](#)

## Contacting IBM Unica technical support

If you encounter a problem that you cannot resolve by consulting the documentation, your company's designated support contact can log a call with IBM Unica technical support. Use the information in this section to ensure that your problem is resolved efficiently and successfully.

If you are not a designated support contact at your company, contact your IBM Unica administrator for information.

### Information you should gather

Before you contact IBM Unica technical support, you should gather the following information:

- A brief description of the nature of your issue.
- Detailed error messages you see when the issue occurs.
- Detailed steps to reproduce the issue.
- Related log files, session files, configuration files, and data files.
- Information about your product and system environment, which you can obtain as described in "System Information" below.

### System information

When you call IBM Unica technical support, you might be asked to provide information about your environment.

If your problem does not prevent you from logging in, much of this information is available on the About page, which provides information about your installed IBM Unica applications.

You can access the About page by selecting **Help > About**. If the About page is not accessible, you can obtain the version number of any IBM Unica application by viewing the `version.txt` file located under each application's installation directory.

## Contact information for IBM Unica technical support

For ways to contact IBM Unica technical support, see the IBM Unica Product Technical Support website: (<http://www.unica.com/about/product-technical-support.htm>).

# 1 Introduction to IBM Unica Distributed Marketing Field Marketing

- [About IBM Unica Distributed Marketing](#)
- [Distributed Marketing use cases](#)
- [About corporate marketers](#)
- [About field marketers](#)
- [To log in to IBM Unica Marketing](#)

## About IBM Unica Distributed Marketing

IBM Unica Distributed Marketing provides marketing organizations with the ability to distribute the execution of centrally managed marketing campaigns throughout the enterprise. It allows centralized marketers to maintain control over corporate standards and business rules, while allowing remote users to tailor or provide input to the campaign for greater local customization and relevancy - ultimately increasing response rates and revenue.

Distributed Marketing supports campaign customization by remote users; but the remote users can change only those parameters specified by the campaign designer.

For example, a retail company might want to centrally control certain selection criteria, but allow individual store owners to control selections related to their stores or locations.

## Distributed Marketing use cases

Distributed Marketing enables organizations to accomplish their goals by supporting multiple distributed marketing use cases. Specifically, Distributed Marketing enables you to:

- Centralize marketing efforts while ensuring that corporate business rules, logic, and best practices are enforced, allowing execution and controlled customization throughout the organization.

- Promote field compliance by having corporate marketers centralize campaign design with corporate business rules (such as opt-outs) and customer preferences.
- More efficiently design, conduct, manage, and measure both global and localized cross-channel marketing initiatives.
- Increase the number of users who are able to contribute to and execute campaigns, providing more flexibility within an organization and enabling measurement and management of marketing efforts.
- Provide "self-serve" customer interaction management within an enterprise, for less technically-oriented marketers and individuals closest to the customer, without compromising corporate rules, goals, or objectives.
- Manage customer interactions in real-time through email and the web.
- Allow marketing decision-making and campaign management to be handled by field marketers, while corporate marketers manage corporate marketing communication and policies.

## About corporate marketers

In Distributed Marketing, corporate marketers develop templates for reusable campaign logic and lists of customer contacts. Corporate marketers manage corporate campaigns and oversee marketing activities of field marketers.

Corporate marketers specialize in designing and generating campaigns from which the field marketer can choose.

### Primary corporate marketer tasks

In Distributed Marketing, corporate marketers perform the following tasks:

- Design campaign flowcharts.
- Create corporate campaigns.
- Manage campaign workflow.
- Create reports used to assess campaign success.
- Design templates for Corporate Campaigns, On-demand Campaigns, and Lists, for use by field marketers and other corporate marketers.

### Corporate marketer tasks in Campaign

Corporate marketers also frequently use Campaign, through which they design and build flowcharts that are associated with Lists, On-demand Campaigns, and Corporate Campaigns.

### Corporate marketer roles

Corporate marketers must be assigned the Corporate Marketer role in the Global security policy, or its equivalent, in order to perform their tasks.

To work in Campaign, corporate marketers must be assigned the following roles:

- Global Policy Execute
- Global Policy Design
- Global Partition Design or Execute

---

 Corporate marketers require this privilege to work with user variables in Campaign.

---

## About field marketers

Field marketers create and run local or regional marketing activities for a territory or line of products. Field marketers work directly with customers, understand their needs, and can make good decisions on how best to reach their customers with on-demand or corporate marketing campaigns.

Field marketers may be line-of-business users, partners, branch office managers, retail store managers, or members of local sales forces. Field marketers create on-demand (local) campaigns that they can run at any time to target a local customer base.

## Field marketers tasks

In Distributed Marketing, field marketers work with:

- Lists

Field marketers typically create Lists in Distributed Marketing and define criteria to select contacts for the Lists. These Lists can then be used by one or more On-demand Campaigns as needed.

- On-demand Campaigns

Field marketers can create and run On-demand Campaigns to target their set of customers.

- Corporate Campaigns

Field marketers subscribe to the Corporate Campaigns they want to participate in. For those Corporate Campaigns, field marketers review and choose which of their customers are targeted by the Corporate Campaign.

## Field marketer roles

Field marketers must be assigned the Field Marketer role in the Global security policy, or its equivalent, in order to perform their tasks.

### Related Topics

- About Lists
- About On-demand Campaigns
- About Corporate Campaigns

## To log in to IBM Unica Marketing

Before you begin working with IBM Unica Marketing, you need the following.

- An intranet (network) connection to access your IBM Unica Marketing server.
- Microsoft Internet Explorer installed on your computer.
- User name and password to sign in to IBM Unica Marketing.
- The URL to access IBM Unica Marketing on your network. If you are uncertain of the correct URL or need a user name or password, contact your IBM Unica Marketing administrator.

1. Launch the Microsoft Internet Explorer browser.
2. Enter the IBM Unica Marketing URL in the browser's address field.

If IBM Unica Marketing is integrated with Windows Active Directory or with a web access control platform, and you are logged in to that system, IBM Unica Marketing displays the dashboard or the default start page configured by the IBM Unica Marketing administrator. Your login is complete. Otherwise, a login page appears.

If your version of IBM Unica Marketing uses SSL, you may be prompted to accept a digital security certificate the first time you sign in. Click **Yes** to accept the certificate.

3. Enter your user name and password, then click **Sign In**.

A Change Password page may display, depending on how IBM Unica Marketing password rules are configured. Enter a new password, confirm by entering it again, and click **Change Password**.

If your login is successful, IBM Unica Marketing displays the dashboard or the default start page configured by the IBM Unica Marketing administrator.

# 2 Customizing IBM Unica Distributed Marketing

- About customizing Distributed Marketing
- To set your basic options
- To set your instance options
- Setting your start page
- The Calendar

## About customizing Distributed Marketing

Users can customize the Distributed Marketing interface to meet their needs. These settings are available in the Distributed Marketing Settings. The following table describes what you can customize.

Option	Description
Basic Settings	Use these options to set your default security policy.
Instances Options	Use these options to customize your default view of Lists, On-demand Campaigns, and Corporate Campaigns.
Calendar/ Timeline Settings	Use these options to customize how you view the system calendar.

### Related Topics

- To set your basic options

## To set your basic options

Your basic options allow you to choose the security policy used by default when you create new items.

1. Select **Settings > Distributed Marketing settings**.  
The Administrative Settings page opens.
2. Click **Basic Settings**.

The Basic Settings page opens.

3. Select the security policy you want to use by default when you create new items in Distributed Marketing in the **Default Security Policy** field.

You can leave **Global** selected, which is the default, to use the global security policy set up by your administrator, or you can select a security policy that your administrator instructed you to select. As a best practice, do not change the security policy without the guidance of your administrator.

4. Click **Save Changes** to save your changes.

## To set your instance options

Instance options allow you to customize your default views of Lists, On-demand Campaigns, and Corporate Campaigns. For example, you may want to specify that the On-demand Campaigns list that opens by default shows only On-demand Campaigns set to run in the current week.

1. Select **Settings > Distributed Marketing settings**.

The Administrative Settings page opens.

2. Click **Instances Options**.

The Instances Options page opens.

3. In each of the List, On-demand Campaign, and Corporate Campaign sections, select the default view.
4. Click **Save Changes** to save your changes.

When you open the Lists, On-demand Campaigns, or Corporate Campaigns page, your default list is shown.

## Setting your start page

If you do not want to have a dashboard page appear when you first log in to IBM Unica Marketing, you can select a page from one of the installed IBM products as your start page.

To set a page you are viewing as your start page, select **Settings > Start on current page**. Pages available for selection as a start page are determined by each IBM Unica Marketing product and by your permissions in IBM Unica Marketing.

On any page you are viewing, if the **Start on current page** option is enabled, you can set the page as your start page.

## The Calendar

- [About the calendar](#)

- [About calendar features](#)
- [To access the calendar](#)
- [Navigating the calendar](#)
- [To set per-session calendar views](#)
- [To access calendar objects by date](#)
- [To access an object from the calendar](#)
- [To export the calendar](#)
- [To publish the calendar](#)
- [Viewing the timeline](#)
- [Viewing the text or graphical calendar](#)

### About the calendar

Field marketers and corporate marketers can use the Distributed Marketing calendar to view the time horizon for marketing campaigns.

Historically, organizations have produced paper-based calendars and have updated them with the latest calendar-driven data. The calendar functionality provides marketing groups with an electronic means of viewing and updating this data.

You can use the calendar as an aid for planning marketing campaigns as follows.

- You can view and update the time lines for Lists, On-demand Campaigns, or Corporate Campaigns.
- You can get an up-to-date view of planned or executed marketing efforts over time.

You can customize the appearance of the calendar in the following ways.

- You can set your default view of the calendar by using the **Calendar/Timeline Settings** screen.
- You can choose the look of the calendar by using the Set View Options dialog box.

#### Related Topics

- [To set your basic options](#)

### About calendar features

The Distributed Marketing calendar has the following features:

- You can display a calendar for Lists, On-demand Campaigns, or Corporate Campaigns.
- The calendar includes start and end dates for the displayed items.
- You can display Corporate Campaigns and On-demand Campaigns on the same calendar in different colors for easy differentiation.
- You can open a Corporate Campaign, List, or On-demand Campaign directly from the calendar.

## Default and per session calendar views

You can use one of two types of settings when you view the calendar:

- The default calendar settings, which are in effect every time you log in.
- The per session calendar settings. The per session calendar is the calendar that results from making temporary changes to the calendar view, without changing the default settings.

## Objects displayed in a calendar

You can display any of the following objects in a calendar:

- Corporate Campaigns
- On-demand Campaigns
- Lists
- Corporate Campaigns and On-demand Campaigns

## Calendar item dates

Each List, On-demand Campaign, or Corporate Campaign displayed in a calendar has a start and end date. These are the target start and end dates you set when you create the object.

## About display options for the calendar

You can modify the calendar display in the following ways:

- You can modify the default calendar settings.
- You can set the calendar view for the current session.
- You can toggle between calendar views:
  - Timeline view
  - Calendar grid view
  - Text view
- You can use the advanced search feature to filter the Lists, On-demand Campaigns, or Corporate Campaigns displayed in the calendar.

## Timeline view

This view displays a time-based view of the Lists, On-demand Campaigns, or Corporate Campaigns you select to display. You can select the time range for the calendar items you select to display in a timeline view.

In a timeline view, each calendar item is displayed as a horizontal bar across its date range. If you enable color coding, each calendar item is colored according to attributes you select.

You can select the date range for the timeline from the following options:

- **Week** displays one week. Each day is listed as a column. The starting day is either Sunday or Monday, depending on the default calendar settings.
- **Month** displays a single calendar month. Each day is listed as a column, and days are grouped into weeks.
- **Quarter** displays three calendar months. Each week is listed as a column, and weeks are grouped into months.
- **Fiscal Year** displays a fiscal year. Your administrator can configure the starting month for a fiscal year. Each month is listed as a column, and the months are grouped into quarters.
- **Calendar Year** displays a calendar year that starts in January and ends in December. Each month is listed as a column, and the months are grouped into quarters.

---

 Any day specified as non-work time is grayed out in a timeline view.

---

### Month-based text or calendar grid view

A month-based calendar view displays a calendar for a selected month.

In addition to a month-based timeline view, you can select from the following month-based calendar views:

- **1-Month Text:** Each day contains a text listing of selected Collaborate Lists, On-demand Campaigns, or Corporate Campaigns.
- **1-Month Calendar Grid:** Each calendar item is displayed as a horizontal bar that begins on the item start date and ends on the item end date. If you enable color coding, each calendar item is colored according to attributes you select.

---

 Any day specified as non-work time is indicated by a gray X in the background in a calendar grid view.

---

### Color-coded by attribute view

You can color-code the calendar display for Lists, On-demand Campaigns, or Corporate Campaigns by selected attributes. You can apply color-coding to a calendar grid view or to a timeline view.

You can filter the calendar display for Lists, On-demand Campaigns, or Corporate Campaigns according to the values of a selected attribute, such as the following:

- Execution status
- Schedule status
- Template type

The calendar displays a legend in the lower-right corner of the screen.

For example, consider the following On-demand Campaign attribute and its possible values:

- Attribute name: Campaign Execution Status
- Valid attribute values: Active, Complete, Under development

If you group and display On-demand Campaigns by Campaign Execution Status, the resulting calendar appears with four colors in the legend. There is one color for each valid attribute value, and one for N/A.

---

 The color assigned to N/A appears in the calendar when calendar items are not assigned a value for the selected attribute.

---

## About the horizontal bars used in calendars

The timeline view and calendar grid view display calendar items as horizontal bars.

Note the following about the bars:

- The bars represent the date range for objects displayed on the calendar.
- The bar color depends on values of an attribute you optionally select for color coding.
- The shape of the bars determine the following about item start and end dates:
  - Rounded left end: The start date is the date indicated by the left end of the bar.
  - Rounded right end: The end date is the date indicated by the right end of the bar.
  - Flat left end: The start date is prior to the visible date range.
  - Flat right end: The end date is beyond the visible date range.

## To access the calendar

You can access the calendar in one of the following ways:

- View the calendar for Corporate and On-demand Campaigns from the Home page.
  - View the default calendar.
  - View a calendar for a set of Lists, On-demand Campaigns, or Corporate Campaigns.
1. From the **Distributed Marketing** menu, select **Lists, On-demand Campaigns, or Corporate Campaigns**.
  2. From the **View** menu, select from **Set View Options**.
  3. Set view options, and select to view the calendar.
  4. Click **Apply**.

## Navigating the calendar

All calendar/timeline views contain the following icons:

Icon	Description
	Opens the Set View Options dialog box. Use this link to change the way the calendar appears.
	Opens the Advanced Search dialog box.
	Changes the date range displayed, moving back one unit in time. For example, if your current calendar view is a monthly timeline of September 2009, clicking  displays August 2009.
Current date range	Opens a drop-down list of available date ranges. Use this link to quickly change to any other date range.  For example, if you are viewing a monthly calendar for July 2009, you can change the view to January 2010 by clicking this link and then choosing January 2010 from the drop-down list.
	Changes the date range displayed, moving forward one unit in time. For example, if your current calendar view is a weekly timeline from 7/20/2009 through 7/26/2009, clicking  displays 7/27/2009 through 8/2/2009.

## To set per-session calendar views

You can change the views of the calendar from default settings by clicking View from any of the following:

- The Calendar page
- A listing of Lists, On-demand Campaigns, or Corporate Campaigns.

1. Access the calendar.
2. Click **View**.

The Set View options dialog box opens.

3. Select options to change the view.
4. Click **Apply**.

## To access calendar objects by date

You can filter the calendar to display all of the Collaborate objects for a selected date.

For example, if the calendar is currently displaying Corporate Campaigns for June, 2009, You can click **7** to open a list page containing all Corporate Campaigns whose date ranges contain June 7th, 2009.

1. Click the date in an open calendar displaying Lists, On-demand Campaigns, or Corporate Campaigns.

## To access an object from the calendar

You can view the List, On-demand Campaign, or Corporate Campaign from its calendar.

1. Click the List, On-demand Campaign, or Corporate Campaign on the calendar.  
The List, On-demand Campaign, or Corporate Campaign opens.

## To export the calendar

You can save a snapshot of the current calendar in HTML format. The calendar is saved in a ZIP archive file.

1. With the calendar open, click the menu next to the print icon (  ) and select **Export**.
2. Choose one of the following options:
  - Click **Open** to open the ZIP file of the calendar.
  - Click **Save** and choose a location, to save the calendar to disk.
  - Click **Cancel** to return to the Calendar screen without publishing.

The system publishes the calendar into a ZIP file archive.

## To publish the calendar

To get a snapshot of the current calendar, save it in HTML format (into a ZIP archive file).

1. Choose the calendar view to publish.  
Select the objects, time range, and appearance for the calendar view. You can do this in either of the following ways:
  - From the **Local Marketing** menu, select **Calendar**, then select items to view.
  - At a list page for Lists, On-demand Campaigns, or Corporate Campaigns, click the View icon (  ) and choose a calendar view.
2. Click the **Print** icon (  ) and select **Export**.
3. Do one of the following.
  - Click **Open** to open the ZIP file of the calendar.
  - Click **Save** and choose a location, to save the calendar to disk.

- Click **Cancel** to return to the Calendar page without publishing.

The system publishes the calendar into a ZIP file archive. You can use any application for working with ZIP files to access the calendar HTML pages. Note that you can navigate to the next and previous pages of the calendar view in your web browser. If you exported any project data, you can also navigate to that data from the calendar HTML pages.

## Viewing the timeline

If you choose a timeline view, you can choose from several date ranges; the screen can display a single week's data all the way up to an entire year's worth of data.

### Related Topics

- Navigating the timeline view
- About timeline view of the calendar
- About horizontal bars on the calendar

## About timeline view of the calendar

This view displays a grid-like view of the objects by some unit of time, depending on which timeline view you selected.

Each object is displayed in a horizontal bar across its date range. The name of the object displays on the bar.

---

 If you select **Enable Color Coding** from the calendar view options screen, each object's bar appears in a color based on an attribute you chose.

---

Choose a date-range for the timeline.

- **Week:** displays one week, with each day listed as a column. The starting day is either Sunday or Monday depending on the option selected in the Calendar/Timeline Settings screen.
- **Month:** displays a single calendar month. Each day is listed as a column, and days are grouped into weeks.
- **Quarter:** displays three calendar months. Each week is listed as a column, and those weeks are grouped into months.
- **Fiscal Year:** displays a fiscal year (starting month depends on a configuration setting, `firstMonthInFiscalYear`). Each month is listed as a column, and the months are grouped into quarters.
- **Calendar Year:** displays a calendar year (starts in January and ends in December). Each month is listed as a column, and the months are grouped into quarters.

---

 Any day that has been specified as non-work time has its column grayed out. Additionally, the name of the non-work time (for example **Labor Day**) displays when you mouse over the date.

---

## Navigating the timeline view

You can navigate the timeline by doing any of the following:

- Click the expand icon (+) next to an object to display tasks within the workflow for that object.
- Click the object name to drill-down to a timeline containing the objects contained in its hierarchy.

---

 Clicking a task opens the Workflow page of the project with which the task is associated.

---

- Click the zoom in () and zoom out () icons. These icons appear above the timeline. Zooming changes the date range of the timeline. For example, zooming in from a monthly timeline takes you to a weekly timeline. The top-level is yearly, and the lowest level is weekly.

## Viewing the text or graphical calendar

The calendar views display data for a selected month. The page displays a grid containing a column for each day of the week: either five columns representing the weekdays, or seven, if you have chosen to display weekend days. You set this option on the Calendar/Timeline Settings page. The page contains either five or six rows, each representing a week.

The view contains a cell for each day of the selected month. The cell for a day contains either a list of items active on the day (text) or a portion of a horizontal bar for each active item (graphical).

### Related Topics

- About the monthly calendar
- About timeline view of the calendar
- About calendar color coding
- About horizontal bars on the calendar

## About the monthly calendar

This view displays a calendar of the selected month. It lists the objects you selected and filtered on.

Choose either of two, monthly, calendar views.

- **1-Month Text:** Each day contains a list of objects. An object is displayed for all days in its date range.
- **1-Month Graphical:** Each object is displayed in a horizontal bar that begins on its start date and ends on its end date. If you select **Enable Color Coding** from the calendar view options page, each object's bar appears in a different color.

- ☀ Any day that has been specified as non-work time is indicated by a gray X in the background. Additionally, the name of the non-work time (for example **Labor Day**) displays when you mouse over the date.
- 

## Navigating the text/graphical calendar

Navigate the calendar by performing any of the following actions:

- Click the object to display its summary page. For example, clicking a List opens the List's Summary page.
- Click the date to display a list page containing objects falling on that date. For example, if the calendar is currently displaying Lists for June 2009, clicking on 9 opens a page containing all Lists whose date ranges contain June 9, 2009.

## About calendar color coding

You can display objects in a color-coded manner on either the graphical calendar or in the timeline views.

You first select the **Enable Color Coding** check box in the either the Calendar/Timeline Settings page or the Set View Options dialog box. After you check the box, the **Based on values for** drop-down menu displays. This list contains attributes for your Lists, On-demand Campaigns, and Corporate Campaigns.

From this list, you can choose any attribute that is an enumerated type. For example, consider the following attribute:

- Name: Product Family
- Valid values: CDs, Credit Card, Home Mortgage

If you choose to group objects by this attribute, your calendar contains four colors: one for each valid value, plus **N/A**, corresponding to any objects that do not contain a value for the Product Family attribute.

The calendar also displays a legend in the lower-right corner of the screen. The legend lists all valid values (plus **N/A**) along with the color corresponding to that value.

## About horizontal bars on the calendar

The timeline view and graphical calendar view display horizontal bars.

Note the following.

- The bars represent the date range for objects displayed on the calendar.
- The name of the object displays on the bar.
- The bars may be colored based on an attribute you select.
- The shape of the bars indicate the following:
  - Rounded-end “start”: indicates the object starts on the date where the bar has a rounded end.

- Rounded-end “end”: indicates the object ends on the date where the bar has a rounded end.
- Flat-end “start”: indicates the object starts prior to the visible date range.
- Flat-end “end”: indicates the object ends after the visible date range.

## To color-code calendar items

You can use color-coding to display objects in a calendar according to a selected attribute.

For example, you can display different colors of Corporate Campaigns, according to whether or not the Corporate Campaign is active.

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 You can also set color-coding for the default calendar settings.

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1. Open one of the following:
  - Calendar
  - Lists
  - Corporate Campaigns
  - On-demand Campaigns
2. Click **View**.

The Set View Options dialog box opens.
3. Check **Enable Color Coding**.
4. Choose a calendar item and corresponding attribute on which to base color-coding from the lists that appear.
5. Click **Apply**.

## To zoom in or out of a timeline view

When you select a timeline view, you use the zoom feature to expand or collapse the date range for the view.

The top level for zooming out displays a year-based date range.

The lowest level for zooming in displays a week-based date range.

For example, zooming in from a monthly timeline takes you to a weekly timeline.

1. Click the zoom in icon () or zoom out icon () to change the view.

# 3 Lists

- About Lists
- Combining Lists for an On-demand Campaign
- Refining the List for an On-demand Campaign
- About Lists and target start and end dates
- About selection criteria
- To create a list
- About reviewing List contacts

## About Lists

A List is a group of contacts. A field marketer can define criteria to include or exclude contacts from a List. For example, the field marketer can create a List that selects all contacts in the customer database within a specified income range.

## Why field marketers create and use Lists

The field marketer can associate Lists with an On-demand Campaign, to specify the contacts to be targeted by that campaign. For example, the field marketer can configure an On-demand Campaign to include contacts from one List and exclude contacts from another List.

Field marketers can re-use Lists, so that multiple On-demand Campaigns target the same or a similar group of contacts. Therefore, by creating and reusing Lists, you can streamline your contact selection for On-demand Campaigns.

Field marketers can also use Lists to analyze target customers outside of On-demand Campaigns. For example, a field marketer can generate a List, then download it as a Microsoft Excel file for further analysis.

## Examples

Field marketers who are responsible for a line of products that are usually purchased by customers with income greater than \$50,000 can create a List that selects only targets with income greater than \$50,000. A field marketer can then use this List as the basis for the target population for all subsequent On-demand Campaigns pertaining to this product line.

As another example, if most On-demand Campaigns target a population over 18, field marketers can create a List that targets the members of the corporate database whose age is over 18, and use this List to create the base target population for all On-demand Campaigns.

## Simple Lists

A Simple List provides basic list functions to select specific recipients for targeting during an On-demand Campaign.

## Advanced Lists

An Advanced List provides all of the functions available in a simple list. In addition, an Advanced List provides a Workflow tab to allow you to configure, schedule, and monitor tasks associated with the List.

An Advanced List must be based on an Advanced List template. You cannot change a List from Simple to Advanced after creation.

You can also configure an Advanced List to recur. A recurring List is an Advanced List configured to automatically generate the List members at specified intervals. The Recurrence tab allows you to configure recurrence properties.

# Combining Lists for an On-demand Campaign

As a field marketer, you can create a set of Lists, each of which filters the corporate database with respect to one demographic characteristic.

You can then combine one or more Lists to create a base target recipient population for an On-demand Campaign.

## Examples of combining Lists

Using selection criteria, you may create a List for each of five income brackets in the customer database. You then select the Lists for the top two income brackets for an On-demand Campaign marketing your high-end product.

In a more complex scenario, you may target customers for a luxury product campaign by combining Lists that use income, zip code, and credit rating as selection criteria.

# Refining the List for an On-demand Campaign

You select the base target population by including or excluding pre-defined Lists in an On-demand Campaign. After doing so, you can further refine the campaign target population for a specific On-demand Campaign by filtering base target population for selected demographic characteristics or other attributes.

For example, if you are a field marketer responsible for marketing basketballs, you can refine a List to include only families that include members of extra-curricular sports teams.

## About Lists and target start and end dates

You can create target start and end dates for Lists, including target start and end dates for each task in the workflow of an advanced list. You can configure these workflow task target dates to trigger scheduled events. For example, you can configure the workflow to generate a target list according to a schedule.

## About selection criteria

Selection criteria are the variables and values you use to filter the corporate database to select targets.

For example, selection criteria may include the variable `Income Range`. You then define the ranges to match for inclusion in the target List. For example, you can specify that the contacts must have a income between \$50,000 and \$100,000. Contacts with an income outside of this range are then not selected.

## Using multiple variables for selection criteria

Typically, you define selection criteria by selecting values for multiple variables.

Provided that the Campaign flowchart that queries the corporate database uses the Distributed Marketing variables as intended, the variables are combined in the query using a logical `AND`.

For example, if you made set the following selection criteria:

Variables	Value to Select
Gender	Male only
Marital Status	Married only

Then the contacts would include married males.

The contacts would *not* include:

- Single or divorced males
- Married females

## Setting up available selection criteria

The Distributed Marketing administrator or corporate marketer sets up the available selection criteria that marketers can use to select contacts.

## To create a list

You should create a List that filters the corporate target customers based on attribute values that are appropriate for your On-demand Campaign before you create an On-demand Campaign that includes or excludes the List, under the following conditions:

- You have not yet created the List.
  - You expect that this List has potential to be re-used for multiple On-demand campaigns, or by several field marketers.
1. From the Home or List page, click **Add a List**.  
A tree view listing of templates appears.
  2. Select a template from the tree view.  
A list of the customer attributes associated with a selected template appears, along with other related information. This information may help you to decide which template to select if there are more than one listed.
  3. Click **Continue**.  
The Summary page of the List Wizard appears. The content of List Wizard differs depending on the template you select.
  4. Fill in the Summary page as needed.  
Ensure that the Target Start date is not a previous date, and that it occurs before the Target End date. To view a calendar and select a day, you can click  next to the date fields.
  5. Click **Next>>**.  
The next page in the List Wizard opens.
  6. Continue filling out the List Wizard as needed, clicking **Next>>** to move through the pages.
  7. Click **Finish** when you have entered all required data.

## About reviewing List contacts

- [About reviewing List contacts](#)
- [To open the Contacts to Review page](#)
- [To change a contact's status](#)
- [To revise the target List selection criteria](#)
- [To add contacts to a List](#)
- [To export contacts to Microsoft Excel](#)
- [To sort contacts](#)
- [To print contacts](#)
- [About customer detail links](#)

## About reviewing List contacts

After a List has run and generated the list of contacts, you can review, and if necessary modify, the list of contacts.

### Contact status in the List

Each contact in a List has one of the following statuses:

- **Waiting.** You or another Field Marketer must review these contacts and decide whether or not to include them in the List.
- **Accepted.** These contacts are included in the List.
- **Newly Added by Field Marketers.** These contacts were not part of the original generated List, but were added by you or another Field Marketer, and are now included in the List.

You or another field marketer can add contacts to the List permanently, or for this use of the List only.

- **Declined.** These contacts were removed from the List.

### Changing the contact in the List

While reviewing the List contacts, you can:

- Decline contacts currently included in the List.
- Accept contacts currently declined.
- Put accepted or declined contacts in Waiting state, to be reviewed by another Field Marketer.
- Add contacts not in the original List.
- Decline contacts added by another Field Marketer.

### Accessing contacts to review

You access the List contacts through that List Summary page, in the List Review section. Counts of the contacts in each status are listed. For example, the following section of the screen shows:

- 3 contacts "Waiting" to be reviewed
- 24 contacts "Accepted" in the List
- 10 contacts "Newly Added by Field Marketers" to the List
- 3 contacts "Declined" to be in the List

List Review	Start Date	End Date	Counts
<b>New Stage</b>			
List Review	03/23/2009 04:04:20 PM	03/23/2009 04:04:20 PM	3 : Waiting Items 24 : Accepted 10 : Newly Added by Field Marketer(s) 3 : Declined

## Analyzing List contacts

You can analyze List contacts in multiple ways:

- Explore contacts in the Contact Review page. You can sort by column to see groups of contacts.  
Export contacts to Microsoft Excel, to use Excel's features to analyze contacts, or to upload to another analysis system.
- Develop a custom Cognos report for contacts with the Marketing Platform reporting package.

### Related Topics

- To open the Contacts to Review page
- To change a contact's status
- To add contacts to a List
- To export contacts to Microsoft Excel
- To sort contacts

## To open the Contacts to Review page

1. Open the List.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

## To change a contact's status

You can change a contact's status as long as another field marketer is not viewing the contacts, or until the List review target end date has passes. If another user is viewing the contacts, or if the review target date has passed, you cannot change a contact's status and the status radio buttons are grayed-out.

1. Open the List.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. To change the status of individual contacts, click the radio button for a different column in that contact's row.

For example, if the **Accept** radio button is selected for a contact, you can change the contact's status to Decline or Review by selecting the respective radio buttons.

4. To change the status of all listed contacts, click one of the buttons at the bottom of the page.

For example, if you opened the list of Accepted contacts, to change them all to Declined, click **Decline All Records**.

The buttons displayed depend on the status of the contacts you opened.

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 When you click one of these buttons, the screen refreshes immediately, and no contacts are listed, because no contacts now meet the criteria you selected when you opened the page. For example, if you chose to decline all accepted contacts, there are no more accepted contacts in the List, so none are displayed in the current window.

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The changes you make to all contacts are saved immediately, you cannot cancel the change.

5. To save your changes and continue working, click **Save Selections**.
6. To close the window, click **Close**.

A message warns you that if you continue, any changes since the last time you clicked **Save Selections** will be lost.

7. To save any other changes, click **Cancel**, then click **Save Selections**, then click **Close** again.
8. To close without saving additional changes, click **OK**.

The status of contacts in the list is updated.

## To revise the target List selection criteria

Before performing this task, you must review the target List for the On-demand Campaign.

You can revise the target List selection criteria if modifications are necessary to meet your campaign requirements.

Your review involves adjusting the selection criteria until the List contains the number of targets your campaign requires. In this case, it is not necessary to review the actual customers in the List.

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 The criteria available to select -- for example, certain income ranges -- are set up by your administrator.

---

1. Open the List or On-demand Campaign.
  2. Open the tab with the selection criteria.

The name of the tab is set by the template designer.

The page opens, displaying the selection criteria used to select the contacts.
  3. Click **Edit**.

The selection criteria becomes editable.
  4. In each field, select values as required.

To select one or more values in a multi-select field, hold down the **Ctrl** key and click each value to select.

To select a range of values in a field, select the first value, hold down the **Shift** key, and select the last value in the range.
  5. If you are editing selection criteria for a List, and it is made available by the template designer, enter or edit the value in the **Cell Size Limit** field.

This value sets the maximum size of the List.
  6. Click **Save Changes** to save the selection criteria you chose.
- These criteria are used to select contacts the next time the List is generated or the On-demand Campaign is run.
- After completing this task, you can customize the campaign offer.

#### Related Topics

- About selection criteria
- To review a target List

## To add contacts to a List

1. Open the List.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.
3. Click **Add Records**.

The Add Records window opens.
4. In the Find Records Matching pane, enter search criteria in the different fields to specify the records you want to find.
5. Click **Search**.

Records matching your search criteria are displayed in the right pane.

6. To add a single contact and close the screen, click the value in the left-most column for that contact (the unique identifier).

The contact is added to the list, and the window closes.

7. To add multiple contacts, check the boxes in those contacts' rows, then click **Accept Selected**.

The list of contacts is filtered to show only those you selected.

8. Click **Accept**.

The contacts are added to the list, and the window closes.

When you add contacts, they are added with the status **Newly Added by Field Marketer(s)**. Therefore, if you are viewing the contacts with a different status, you do not see the newly added contacts in the list. To view those contacts, you must return to the List Summary, and click the number next to **Newly Added by Field Marketer(s)**.

## To export contacts to Microsoft Excel

If you have the proper permissions, you can save the contacts in the List to a Microsoft Excel file for further analysis.

1. Open the List.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Click **Export**.

You are prompted to open or save the Excel file.

## To sort contacts

You can sort contacts by any column to better find and analyze those in the list.

1. Open the List.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Click the column header.

The first time you click the column header, the table is sorted by that column in descending order. Click the column header again to reverse the sort order.

## To print contacts

1. Open the List.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Click **Print**.

The table contacts open in a new window formatted for printing.

4. Right-click and select **Print**.

The Print dialog box opens.

5. Follow the steps for printing on your network and printer.

## About customer detail links

A customer detail link in a List is a link to another application which displays additional information about the customer.

If your administrator has configured customer detail links, when reviewing a List, you can click a link, and information from a customer database is displayed in a new browser window.

Your administrator configures customer detail link when configuring the list manager.

## To open customer details from the Contact Review page

1. Open the List.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Scroll to the right of the window, if necessary, and click the icon or hypertext link in the last column for the customer for whom you want details.

The icon or hypertext link you see is determined by your administrator.

The customer details open in a new window.

# 4 On-demand Campaigns

- About On-demand Campaigns
- On-demand Campaign components
- Managing an On-demand Campaign

## About On-demand Campaigns

An On-demand Campaign is a marketing campaign that field marketers create and run on an as-needed basis.

Typically, the corporate marketer provides the field marketer with a campaign template, allowing the field marketer to create new On-demand Campaigns based on that template, and to modify those campaigns for his or her targets.

Field marketers can use On-demand Campaigns to deliver a marketing message to a set of their customers while exercising some control over the offer, timing, and fulfillment methods used to deliver the marketing message. The amount of control field marketers have over the On-demand Campaigns they manage is determined by corporate marketing.

## Field marketers' tasks for On-demand Campaigns

Using On-demand Campaigns, field marketers can:

- Specify On-demand Campaign target selection using characteristics such as demographic data, contract data, contact information, and so on.
- Generate the On-demand Campaign target list, or schedule the list generation for a future date.
- Run or schedule the On-demand Campaign.
- If your organization has set up reports for Distributed Marketing, generate reports on the performance and status of the On-demand Campaign.

## On-demand Campaign components

On-demand Campaigns include the following components and features to help field marketers:

- The use of pre-defined Lists for specifying the base population to receive an on-demand marketing campaign

- The target list selection criteria for filtering the corporate database
- The campaign schedule that includes target start and end dates
- The campaign status
- The campaign run history
- Marketing messages in the form of attachments

## Managing an On-demand Campaign

- [Managing an On-demand Campaign](#)
- [To create an On-demand Campaign](#)
- [To generate a target List for an On-demand Campaign](#)
- [To review a target List](#)
- [To revise the target List selection criteria](#)
- [To start an On-demand Campaign](#)
- [On-demand Campaign fulfillment](#)

## Managing an On-demand Campaign

The following list describes the tasks you, as a field marketer, take to create and execute an On-demand Campaign:

1. Create the On-demand Campaign.

This task includes defining the target list for the On-demand Campaign. You can do one of the following:

- Specify selection criteria to use to generate the List as part of the On-demand Campaign
- Use one or more existing Lists to define the targets of the On-demand Campaign. This involves:
  - a. Select existing Lists with target customers to *include* in the On-demand Campaign.
  - b. Select existing Lists with target customers to *exclude* in the On-demand Campaign.
  - c. Select specific attributes to refine the target list.

2. Optionally, modify the workflow inherited from the On-demand Campaign template.
3. Generate the target list.
4. Review the target list results, and optionally add or remove customers from this list.
5. Optionally, revise the target list selection criteria, if modifications are necessary to meet your campaign requirements.
6. Customize the offer. Add attachments, personalization, and so on.

For example, you can add details concerning the offer, such as, "you are getting a 10% discount."

### 7. Run the On-demand Campaign.

You can optionally schedule the On-demand Campaign to run at a future date.

### 8. Fulfill your campaign.

If your organization has set up reporting for On-demand Campaigns, after your corporate office enters campaign results data in the database, you can analyze the On-demand Campaign results.

## To create an On-demand Campaign

### 1. From the Home page, click **Add an On-demand Campaign**.

A tree view listing of templates appears.

### 2. Select a template from the tree view.

The list of templates available to you is controlled by your security permissions.

A list of the attributes associated with the selected template appears, along with other related information. This information may help you to decide which template to select if there are more than one listed.

### 3. Click **Continue**.

The first page of the On-demand Campaign Wizard appears. The content of Wizard differs depending on the template you select.

### 4. Perform the following tasks as you go through the Wizard to specify the target list:

- a. Select at least one Collaborate List to include or exclude.

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 This step may differ according to what the corporate marketing team has designed.

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- b. Select values for attributes presented to you to refine the target list for the campaign, or to designate information about the offer or campaign fulfillment.

### 5. Fill in the attributes for fulfillment specification.

Next you must generate the target list.

#### Related Topics

- To generate a target List for an On-demand Campaign

## To generate a target List for an On-demand Campaign

Before performing this task, you must create the On-demand Campaign.

You generate a target List for an On-demand Campaign in order to analyze the target customers of a campaign. You can then modify the target List before running or scheduling the On-demand Campaign.

1. Select a Collaborate On-demand Campaign.
2. Generate the target List in one of three ways:
  - From the List Execution Status section of the Summary tab, click **Generate List**.
  - From the List Execution Status section of the Summary tab, click **Schedule Run**. Then select the run schedule and click **Run with these Settings**.
  - From a Flowchart Run system task, which runs a flowchart in Campaign that selects the target customers.

After you have generated the target List, you then review the List members.

### Related Topics

- To create an On-demand Campaign
- To review a target List

## To review a target List

Before performing this task, you must generate the target List for the On-demand Campaign.

You review the target List to determine the appropriateness of the selected customers. During this task you can add or remove customers from the target List as needed.

1. Open the Summary page for the On-demand Campaign.
2. Open the Contacts to Review page by clicking a number in the Counts column of the List Review table.

The Contacts to Review page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted for the On-demand Campaign are included in the review page.

3. To change the status of individual contacts, click the radio button for a different column in that contact's row.

For example, if the **Accept** radio button is selected for a contact, you can change the contact's status to Decline or Review by selecting the respective radio buttons.

4. To change the status of all listed contacts, click one of the buttons at the bottom of the page.

For example, if you opened the list of Accepted contacts, to change them all to Declined, click **Decline All Records**.

The buttons displayed depend on the status of the contacts you opened.

 When you click one of these buttons, the screen refreshes immediately, and no contacts are listed, because no contacts now meet the criteria you selected when you opened the page. For example, if you chose to decline all accepted contacts, there are no more accepted contacts in the List, so none are displayed in the current window.

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The changes you make to all contacts are saved immediately, you cannot cancel the change.

5. To save your changes and continue working, click **Save Selections**.
6. To close the window, click **Close**.

A message warns you that if you continue, any changes since the last time you clicked **Save Selections** will be lost.

7. To save any other changes, click **Cancel**, then click **Save Selections**, then click **Close** again.
8. To close without saving additional changes, click **OK**.

The target List now contains the customers you added, and does not contain the customers you removed.

After you have reviewed the target List, you can revise the List selection criteria if necessary.

#### Related Topics

- To generate a target List for an On-demand Campaign
- To revise the target List selection criteria

## To revise the target List selection criteria

Before performing this task, you must review the target List for the On-demand Campaign.

You can revise the target List selection criteria if modifications are necessary to meet your campaign requirements.

Your review involves adjusting the selection criteria until the List contains the number of targets your campaign requires. In this case, it is not necessary to review the actual customers in the List.

 The criteria available to select -- for example, certain income ranges -- are set up by your administrator.

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1. Open the List or On-demand Campaign.
2. Open the tab with the selection criteria.

The name of the tab is set by the template designer.

The page opens, displaying the selection criteria used to select the contacts.

3. Click **Edit**.

The selection criteria becomes editable.

4. In each field, select values as required.

To select one or more values in a multi-select field, hold down the **Ctrl** key and click each value to select.

To select a range of values in a field, select the first value, hold down the **Shift** key, and select the last value in the range.

5. If you are editing selection criteria for a List, and it is made available by the template designer, enter or edit the value in the **Cell Size Limit** field.

This value sets the maximum size of the List.

6. Click **Save Changes** to save the selection criteria you chose.

These criteria are used to select contacts the next time the List is generated or the On-demand Campaign is run.

After completing this task, you can customize the campaign offer.

#### Related Topics

- About selection criteria
- To review a target List

## To start an On-demand Campaign

Before performing this task, you must review the target List for the On-demand Campaign, and if necessary revise the target List selection and customize the offer if necessary.

You can run the On-demand Campaign immediately, or schedule a future run of the On-demand Campaign.

1. Open the On-demand Campaign Summary tab.
2. From the **Status** menu, select **Start On-demand Campaign**.

The On-demand Campaign is now in the **In Progress** state.

3. To start the On-demand Campaign immediately, in the **Next Run** section of the Summary tab, click the Run icon ().

#### Related Topics

- On-demand Campaign fulfillment

## On-demand Campaign fulfillment

Corporate marketers can specify On-demand Campaign fulfillment requirements to field marketers through a custom tab on the On-demand Campaign template.

## **Local or corporate service fulfillment**

Depending on how your administrator configured the On-demand Campaign template, you may need to fulfill the On-demand Campaign. Or, you may be required to use a corporate service to fulfill the campaign. Or you may have to choose between these methods.

When you are permitted by the corporate office to fulfill the On-demand Campaign, the corporate marketers may configure the mail merge feature to facilitate fulfillment.

## **The mail merge feature**

Field marketers or corporate marketers can use the Collaborate mail merge feature to personalize standard letters by merging a Microsoft Word letter document with a file containing contact data for on-demand marketing campaign target customers.

# 5 Corporate Campaigns for Field Marketers

- [About Corporate Campaigns](#)
- [Corporate Campaigns and field marketers](#)
- [Why field marketers participate in Corporate Campaigns](#)
- [About subscriptions](#)
- [About Corporate Campaign proposed target lists](#)
- [Field marketer access to Corporate Campaigns](#)

## About Corporate Campaigns

Corporate Campaigns are marketing campaigns that are planned, scheduled, and executed by a centralized marketing team.

Corporate Campaigns are campaigns that present a corporate marketing message to targeted contacts. In Distributed Marketing, Corporate Campaigns execute on a fixed schedule, which you specify using scheduled workflow tasks in the Corporate Campaign Workflow tab.

Corporate marketers typically use Distributed Marketing to incorporate recommendations about which target customers to include with a Corporate Campaign from field marketers throughout an organization. A corporate Campaign allows corporate marketers and field marketers to collaborate on a corporate-level campaign.

### Related Topics

- [Corporate Campaigns and field marketers](#)

## Corporate Campaigns and field marketers

When a corporate marketer uses the Subscription task in the workflow for a Corporate Campaign, invited field marketers choose whether or not to subscribe to the Corporate Campaign. When field marketers subscribe to a Corporate Campaign, they provide corporate marketers with recommendations about which target customers to include in the campaign or wave.

By utilizing field marketer recommendations, central marketing teams can run programs on behalf of some or all of their field marketing teams, while allowing field marketers to provide input about specific individuals to contact.

## Multi-wave Corporate Campaigns and field marketers

When a Corporate Campaign contains multiple waves, and uses the Subscription system task in the workflow, invited field marketers choose which waves to subscribe to. A field marketer can subscribe to any subset of waves in the Corporate Campaign.

## Why field marketers participate in Corporate Campaigns

By participating in Corporate Campaigns, field marketers help distribute the marketing campaign effort, enabling the organization to take advantage of the marketing design and strategy expertise provided by a central team of marketing specialists, as well as the familiarity field marketers have with their personal contacts.

## Corporate marketer's role in a Corporate Campaign

Using Distributed Marketing, corporate marketers present the following to field marketers:

- The campaign marketing initiative, in the form of marketing messages and other materials
- The portions of a proposed target list assigned to each field marketer

## Field marketer's role in a Corporate Campaign

Field marketers participate in specific Corporate Campaigns. Optionally, you can use the Subscription feature to manage field marketers' participation in Corporate Campaigns. Participating field marketers review their portions of the proposed target list and provide input to corporate marketers about whom to add or delete from the campaign. Once each field marketer provides final feedback on his or her portion of the list, the corporate office fulfills the campaign.

## Examples

The following examples illustrate situations in which field marketers decide which customers to include in a Corporate Campaign:

- One field marketer may decide that a particular corporate initiative is not appropriate for some of her assigned customers and removes those customers from the proposed target list.

- Another field marketer may not have enough resources to handle the demand generated by the corporate initiative. In this case, the field marketer decides to remove some customers from the proposed target list.
- Another field marketer may want to include customers not originally targeted by the corporate marketing campaign, and adds them to the proposed target list.

## About the Corporate Campaign workflow

Corporate and field marketers typically work on Corporate Campaigns as follows:

1. Corporate marketers design the corporate marketing campaign.
2. Corporate marketers create a Corporate Campaign in Distributed Marketing.
3. Using the optional Subscription workflow task, corporate marketers invite appropriate field marketers to subscribe to the Corporate Campaign.
4. Field marketers subscribe to the Corporate Campaign.
5. Corporate marketers create the proposed target list for the campaign.
6. Corporate marketers notify field marketers of the availability of the List.
7. Field marketers review the Corporate Campaign and provide feedback to corporate marketers on the target list.
8. Corporate marketers can check field marketer review status.
9. Corporate marketers incorporate field marketer feedback to generate the final target list.
10. Field marketers optionally analyze campaign success.

## Example flow for creating a Corporate Campaign target list

The typical workflow for creating a final target list for a Corporate Campaign is:

1. The corporate marketer generates a proposed target list
2. Field marketers review and revise the proposed target list.
3. The corporate marketer generates the final target list.

In this example, the corporation is a financial institution. A corporate marketer is introducing a new financial product and expects marketing decision feedback from a team of field marketers.

### The corporate marketer generates a proposed target list

After designing a marketing campaign for the new financial product, the corporate marketer selects customers from the corporate database who are appropriate recipients of this campaign.

The corporate marketer may use the optional Subscription task in the workflow to invite the appropriate field marketers to participate in the Corporate Campaign.

If the corporate marketer does not use the Subscription task, all field marketers who have access to any records in the original target list (as defined by Data Level Filters) are invited to participate in the Corporate Campaign through its Field Marketer Notify task. If there are no data level filters, all field marketers are automatically invited to participate in the Corporate Campaign, and they receive notifications to review of the target list.

### Field marketers review the proposed target list

Field marketers subscribe to the Corporate Campaign. They then review their portions of the target list.

Field marketer target assignments are made through the corporate database. For the purpose of this example, assume the following target assignments for two field marketers within the same corporation:

- Field\_Marketer\_1 is responsible for target\_FM11 and target\_FM12.
- Field\_Marketer\_2 is responsible for target\_FM21, target\_FM22, and target\_FM23.

Field marketers can view only those target customers assigned to them from a Corporate Campaign, as defined through data level filters.

In this example, the following occurs:

- Field\_Marketer\_1 accepts both of her target customers on the proposed list.
- Field\_Marketer\_2 declines all of his target customers on the proposed list due to business constraints.
- Both field marketers finalize their customer selection for the Corporate Campaign.
- Final customer selections made by the field marketers are recorded in the database used by Campaign.

### The corporate marketer generates the final target list

After the field marketers review the proposed customers and make their final decisions, the corporate marketer generates a final target list that incorporates field marketer feedback. When they are satisfied that the list review is complete, they can click **Verify and Lock**, and mark the Review List task as complete in the workflow, to enable the Fulfillment tasks to begin.

## About subscriptions

A subscription is the invitation to a field marketer to include his or her territory in a Corporate Campaign, or a wave of a multi-wave Corporate Campaign. Through subscriptions, field marketers can control which Corporate Campaigns and waves, and potentially which territories within a campaign or wave, they participate in.

In addition, supervisors can control the Corporate Campaigns or waves their staffs participate in. When a supervisor subscribes to a Corporate Campaign, field marketers that are under the supervisor in a defined territory hierarchy are also subscribed to the campaign. For example, if the territory supervisor for New England subscribes to a corporate campaign, the state manager for Vermont also participates in the campaign.

## Subscriptions and data level filters

Subscriptions can be used in combination with data level filters to control both what data is included in the generated list of customers for a Campaign, and who is invited to review the list of customers that is generated.

### Example

If MA\_FM is the field marketer for Massachusetts (MA), you can use a state-level subscription to invite MA\_FM to include or exclude Massachusetts customers from the Corporate Campaign contact list. If MA\_FM accepts the invitation, MA customers are on the contact review list. Using data level filters, MA\_FM can also be configured to only see MA customers, thus limiting his view to those customers of interest to him. When data level filters are present, only Field Marketers who have data of interest on the generated list are invited by the Notify Field Marker system task.

Subscriptions can operate at multiple levels. So for example, NE\_FM might be the Northeast Regional FM who supervises the state field marketers in his region, which might include Massachusetts. The corporate marketer can invite regional field marketers to subscribe for their region.

If NE\_FM is invited to subscribe, he could accept or decline. If he accepts, data for all customers in his region are included in the list generation. So continuing the example above, data for Massachusetts's customers would be included in the list. In this case, the MA\_FM has no control over whether MA data is included, because the subscription invitation is issued at the region level. However, if the data level filters are configured to allow MA\_FM to see MA customers, MA\_FM is invited to review the MA customers when the Corporate Campaign contact list is generated.

## Defining territories

To support subscriptions, the administrator must define a territory hierarchy on the Distributed Marketing server. For more information, see the *Campaign and Related Products Installation Guide* or the *Distributed Marketing Administrator's Guide*.

## To subscribe to a Corporate Campaign

Field marketers can subscribe to any Corporate Campaign, or wave of a multi-wave Corporate Campaign, for which they are an appropriate user, based on the Corporate Campaign's or wave's subscription level.

1. Click **Alerts**.

If there is a new Corporate Campaign or wave to which you can subscribe, you see an alert that begins "You have received the subscription request *wave\_name subscription\_task\_name*."

You can also subscribe to a Corporate Campaign or wave by viewing the new subscriptions in your Home Page.

## About Corporate Campaign proposed target lists

The proposed target list for a corporate marketing campaign is the initial list of customers for whom the campaign is intended when the campaign is first designed by a corporate marketer.

These customers are associated with field marketers in the corporate database; for example, the associations may be based on the customer's region.

Field marketers are assigned those proposed target customers in a Corporate Campaign to whom they are associated. They must then review those customers and decide on the final list for the Corporate Campaign.

Field marketers can:

- Accept or decline each customer.
- Add target customers to the list of proposed customers.
- Finalize the target list for the Corporate Campaign.

## About reviewing the Corporate Campaign proposed target lists

Field marketers typically perform the following tasks for Corporate Campaigns to which they are subscribed:

- Review Corporate Campaign status information and other data in the Corporate Campaign Summary page.
- Review attachments to the Corporate Campaign.

Corporate marketers may include attachments to provide field marketers with information that is relevant to the Corporate Campaign. For example, an attachment may contain marketing messages.

- Review his or her portion of the proposed target list.
- Provide the corporate marketer with recommendations for modifications to the proposed target customer list.

Note the following:

- The changes field marketers make to the proposed target customer list are stored in the corporate database; corporate marketers access the changes there.
- When field marketers finalize their portions of the proposed target list, target customer review data status is updated in a database table.

## About adding customers to Corporate Campaign

Field marketers can add target customers to a proposed list for a Corporate Campaign to which they subscribe.

For example, corporate marketers may propose that the list targets previous customers, while field marketers have new target customers in mind. Field marketers can filter their lists of personal contacts to select target customers to add.

When field marketers add customers to the proposed list for a corporate marketing campaign, they can select a set of customers with specific characteristics. For example, corporate marketers can allow field marketers to select from the following criteria when adding customers to a proposed list:

- Name
- Age
- Income range

## To review proposed target customers for a Corporate Campaign

When you participate in a Corporate Campaign, you must review the proposed target customers for that campaign. When you are presented with a proposed list of target customers for review, you must either accept or decline each customer before you can finalize your target list selections for the corporate campaign.

You can accept or decline proposed target customers individually, or all at once. You can also add one or more of your customers to the proposed list.

In recurring Corporate Campaigns, if you are allowed to do so by the campaign creator, you can add to or exclude contacts from a list for each recurrence of the workflow. When you add or remove contacts in this way, the changes you make remain in effect throughout all list review tasks within the recurring workflow. If you are not allowed this option, you can only modify the target list for the current occurrence of the workflow.

1. Open the Corporate Campaign.
2. In the Summary page, click **Waiting items**.  
The Contact to Validate page opens.
3. Accept or decline customers as needed.
  - To accept all proposed customers, click **Accept All Records**.
  - To decline all proposed customers, click **Decline All Records**.
  - To accept specific customers only, check the **Accept** column in the rows for those customers.
  - To decline specific customers only, check the **Decline** column in the rows for those customers.

- To decline specific customers permanently, check the **Dec. Perm.** column in the rows for those customers.

---

 This option appears only if permanent additions/deletions has been selected in the Corporate Campaign.

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- To add customers:
  - a. Click **Add Records**.
  - b. Select one or more target list filtering criteria from the options presented on the form, then click **Search**.

The target records resulting from your search are displayed.

- c. Check one or more of the customer records to add to the target list.
- d. Click **Accept Selected**.

If you selected to add or delete contacts permanently, a message opens asking whether you want to add the contacts permanently for recurring campaigns.

- e. Click **OK** to add the contacts for all future occurrences of the workflow.

Or click **Cancel** to add the contacts for the current occurrence only.

4. Optionally check **After the next save, consider my review complete** to validate and lock this list when you save changes.

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 If you do not check this option, any customer records that you do not accept or decline appear when you next review the target contacts.

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 Added contacts do not appear until you close the window and click **Newly added by Field Marketer**.

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5. Click **Save** to save changes and complete your review of the proposed target list.  
Accepted and removed contacts disappear from the list, and are only viewable in the Accepted/removed lists page.

## About making permanent additions and deletions to a list

When working with a recurring workflow, you may be tasked with several list review steps within the course of a single Corporate Campaign. If desired, you can make permanent additions or deletions from the list; these additions or deletions remain in effect for all future occurrences of the List Review task.

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 The ability to make permanent additions or deletions to a contact list is controlled by the Review List task in the Corporate Campaign workflow. If this option has not been selected for a List Review task, you are not able to add or delete contacts permanently in the corresponding list.

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## When to add or remove contacts permanently

You should make permanent additions or deletions to a list when the following statements are true:

- You are using a recurring workflow.
- The recurring workflow includes several List Review tasks.
- You know that the list as generated is incomplete; you need to add and/or delete contacts. You want these additions and deletions to remain in effect for each future occurrence of the recurring campaign.

## To view or accept previously declined targets

You can view previously declined target customers before finalizing your portion of the proposed target list, and, if desired, accept those customers.

1. Open the Corporate Campaign for which you have declined target customers on the proposed list.
2. Click **View Declined**.
3. You can accept any declined target customers from this list by checking the customer entries under the **Accept** column.

You can also select **Accept All Records** or **Set All Records to Review** to accept or review all the previously declined records.

Those customers are now included in the list.

You must now finalize the list.

### Related Topics

- To finalize your portion of a Corporate Campaign target list

## To view or decline previously accepted targets

You can view previously accepted target customers before finalizing your portion of the proposed target list, and, if desired, decline those customers.

1. Open the Corporate Campaign for which you have accepted target customers on the proposed list.
2. Click **View Accepted**.
3. You can decline any accepted target customers from this list by checking the customer entries under the **Decline** column.

You can also select **Decline All Records** or **Set All Records to Review** to decline or review all the previously accepted records.

Those customers are now removed from the list.

You must now finalize the list.

### Related Topics

- To finalize your portion of a Corporate Campaign target list

## To view or remove added targets

You can view previously added target customers before finalizing the proposed target list. You can also remove previously added target customers.

1. Open the Corporate Campaign for which you have added customers to the proposed list.
2. Click **View Additions**.
3. You can remove any added target customers from the list by checking the customers under the **Remove** column.

You can also select **Decline All Records** to decline all the previously accepted records.

Those customers are now removed from the list.

You must now finalize the list.

### Related Topics

- To finalize your portion of a Corporate Campaign target list

## To finalize your portion of a Corporate Campaign target list

You can finalize the proposed target list for a Corporate Campaign after you have:

- Reviewed the proposed target list.
  - Accepted or declined each customer in the proposed target list.
  - Optionally, added target customers to the proposed list.
1. Open the Corporate Campaign.
  2. In the Summary page, click **Validate and lock list**.

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 You cannot reverse this action.

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The list is now finalized.

### Related Topics

- To review proposed target customers for a Corporate Campaign
- To view or decline previously accepted targets
- To view or remove added targets

# Field marketer access to Corporate Campaigns

By default, only corporate marketers are authorized to create and modify all aspects of Corporate Campaigns.

As a field marketer, you can view Corporate Campaigns to which you subscribed.

You can view proposed target customers that are assigned to you. You cannot view target customers assigned to other field marketers.

You can typically perform the following tasks:

- View the Corporate Campaign summary.
- View any attachments included with the Corporate Campaign.
- Review, accept, add, or remove target customers from the proposed target list.
- Finalize your portion of the proposed target list.
- View the calendar to see the Corporate Campaign schedule.

For more information about your access privileges, see you administrator.

# 6 Workflows for Field Marketers

- About workflows
- Workflow concepts
- About global suppressions and global suppression segments
- About System tasks
- About User tasks
- About task status
- To edit the the default workflow
- About milestones
- About schedules
- About date rippling
- About designing for multiple drops, lots, waves, and offers
- Updating and finishing tasks
- About the workflow spreadsheet view

## About workflows

You can manage tasks associated with an Advanced List, On-Demand Campaign, or Corporate Campaign. The Workflow tab provides a spreadsheet on which you can list all tasks. You can assign dates to the task, and team members to perform them.

When you create a new Advanced List, On-demand Campaign, or Corporate Campaign, you use the **Workflow** tab to customize the workflow provided by the template. When you participate in a Advanced List, On-demand Campaign, or Corporate Campaign, you use the **Workflow** tab to keep track of your work. If you have the appropriate permissions, you can save a workflow as a workflow template.

Any member of the Advanced List, On-demand Campaign, or Corporate Campaign can edit any column of the **Workflow** tab as long as he or she has the appropriate access permission.

The workflow tab has an edit mode and three view modes.

- To edit the workflow displayed on the tab, click the Edit icon ().
- You can view the workflow as a spreadsheet, a timeline, or a process flowchart.

### Related Topics

- About the workflow spreadsheet view
- About the workflow timeline view
- About the workflow process flowchart view

# Workflow concepts

## Tasks

Tasks are steps in the workflow where a user or the system must take an action. The task is not complete until the action is complete.

Tasks have several types of data associated with them, described below.

## Stages

You can group workflow tasks under headings called stages. Stages can help you with task organization. For example, you can create a stage that has all tasks performed by your field marketers. Stages are the headings in bold that group the tasks together.

## Dates

Workflows contain the following types of dates.

- **Actual** dates specify when tasks start and finish.
- **Target dates** are dates used to plan the schedule. Typically, they are set at the beginning of the project.
- **Anchored dates** are fixed dates that cannot change, even if the dates of the tasks upon which they are dependent change.
- **Non-work time** are dates when people do not work so the system skips those dates when calculating durations for tasks. Distributed Marketing currently supports system-wide non-work time that applies to all tasks. It is up to the List, On-demand Campaign or Corporate Campaign manager to determine whether overriding any of these dates is necessary. System administrators enter and maintain these dates.
- **Weekend dates** are dates you use to specify work that occurs on a weekend on a per-task basis. You can schedule work on a weekend date using the Schedule Through option for each task.

## Duration

Duration is the actual number of days assigned to a task. If you assign actual start and end dates, the duration is automatically calculated as the difference between the actual start date, and the actual end date for a task. You can assign duration using any non-negative number. For example, you can use 0.25 to assign a quarter of a day for the task duration.

## Effort

The work effort in days (as opposed to duration) that it takes a user to complete a task. For example, the task may have taken three calendar days to complete, but the task owner only spent half a day on the task for each of the three days, so the effort is one and a half days.

## Locked tasks

When you edit a task, the task is locked so no other user can edit it at the same time.

If anyone attempts to edit a locked task, they receive a warning message, indicating that it is currently in use.

## People and roles

You can assign tasks to individual team members or you can assign tasks to all team members in a given role. When you assign a task to one or more team members, they are considered to be the task owner. You assign roles to team members from the People tab of the List, On-demand Campaign, or Corporate Campaign.

Workflows use the following concepts to identify the people who perform work.

- **Task owners** are the people responsible for executing or managing tasks.
- **Roles** are used as a bridge between tasks and people. When a role is assigned to a task in a List, On-demand Campaign or Corporate Campaign, all users associated with that role are owners of the task. Templates can contain roles for certain tasks. Then when you create a List, On-demand Campaign or Corporate Campaign, some (or all) of the tasks have a default role already associated with them.

### Related Topics

- About System tasks
- About User tasks

## About global suppressions and global suppression segments

Use the global suppression feature to specify a list of IDs (in a single audience level) that are automatically excluded from all cells in flowcharts in Campaign

You do this by creating this list of unique IDs as a strategic segment, then by specifying that segment as a global suppression segment for a particular audience level. Only one global suppression segment can be configured for each audience level.

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- ✦ Specifying and managing global suppression segments requires the appropriate permissions and is usually performed by your Campaign administrator. For details, see the *Campaign Administrator's Guide*.
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# About System tasks

- [About System tasks](#)
- [Flowchart Run system task](#)
- [List Review system task](#)
- [To create a flowchart run task](#)
- [To create a List Review system task](#)
- [To enable permanent updates to a list](#)

## About System tasks

System tasks are workflow tasks that start automatically, based on a combination of start date and completion of tasks on which they are dependent.

 When you pause a workflow, system tasks scheduled during the time the workflow is paused do not execute until the workflow resumes.

You can create these types of system tasks:

- Subscription
- Flowchart Run
- Notify Field Marketers
- List Review

### Related Topics

- [Flowchart Run system task](#)
- [List Review system task](#)

## Flowchart Run system task

A Flowchart Run system task allows you to specify a flowchart that should run at a particular place in the workflow. When you create a Flowchart Run system task, you specify one of the following:

- For corporate marketers working with Corporate Campaigns, the name of the flowchart in the linked campaign (in Campaign) in the workflow.
- For field marketers working with On-demand Campaigns and Lists, the name of the tab that is associated with the flowchart in the On Demand Campaign or List that you want to use to gather data.

When Distributed Marketing executes a Flowchart Run system task, flowchart run is started in Campaign.

Flowchart Run system tasks start and finish automatically when there is a matching flowchart in Campaign, when the target start date is reached and when all tasks it depends on are finished; you do not need to manually start or stop a Flowchart run system tasks. The % **Complete** field fills in automatically as the task proceeds.

### Flowchart run tasks with no assigned flowchart

The icon for the Flowchart Run system task appears red when no known flowchart is assigned to the task. After you have assigned a flowchart, the icon's color changes to black.

### Flowchart Run tasks and Corporate Campaigns

For Corporate Campaigns, for the Flowchart Run system task to run correctly, you must save and publish the flowchart of the linked campaign in Campaign.

## List Review system task

A List Review system task allows you to identify time within the workflow during which Field Marketers will be reviewing contact lists that result from a flowchart run.

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 A List Review system task must be dependent on a Run Flowchart system task.

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List Review system tasks start and finish automatically. You can also manually finish a List Review system task when you are sure all Field Marketers have completed the review. Once you manually finish the List Review task, the next dependent task (if any) in the workflow starts when its target start date has been reached.

When the List Review is completed, manually or automatically, the List is locked to field marketers; field marketers can no longer change their portions of the List.

### List Review system tasks and recurring workflows

In recurring On-demand Campaigns or Corporate Campaigns, you can enable permanent updates so that any additions or removals that take place during List Review are applied automatically in all occurrences.

### List Review system tasks and multi-offer campaigns

In multi-offer On-demand Campaigns or Corporate Campaigns, you can divide a list generated by a single Run Flowchart system task into several segments. The results of the Run Flowchart system task are presented as several Lists.

## To create a flowchart run task

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add Task Row** icon ().

3. Select **Flowchart Run**.

A new task row is added to the flowchart.

4. In the **Flowchart Name** column, perform one of the following tasks:

- For Corporate Campaigns, enter the name of the flowchart from your linked campaign.
- For On Demand Campaigns and Lists, select the name of the tab that runs the Campaign flowchart.

5. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

You can also change the name of the task.

6. Click **Save and Finish**.

If the workflow is part of a Corporate Campaign, you must save and publish the associated flowchart in Campaign.

### Related Topics

- Flowchart Run system task

## To create a List Review system task

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add Task Row** icon (  ).

3. Select **List Review**.

A new task row is added to the flowchart.

4. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

You can also change the name of the task.

5. Make the new List Review system task dependent on a Run Flowchart system task.

6. Click **Save and Finish**.

7. if you are working on a multi-offer campaign:

- a. Click the name of the List Review system task.

The Task properties screen opens.

- b. In the **Segment Code** field, enter the name of the segment as it appears in the flowchart in your linked campaign.

- c. Click **Save and Return**.

You can now enable permanent updates to a list.

### Related Topics

- List Review system task
- To enable permanent updates to a list
- Managing task dependencies

## To enable permanent updates to a list

1. In the workflow spreadsheet, in Edit view, double-click the List Review system task you want to change.

The Post Task dialog box opens.

2. Check the **Allow permanent updates** checkbox.

### Related Topics

- List Review system task

## About User tasks

User tasks are workflow tasks that you define and that must be started manually. For example, you can add a user task to the workflow to accommodate the time necessary to develop creative material for the campaign, followed by a user task to approve the creatives.

Users must manually update the status and progress for user tasks.

## About task status

Each task in a workflow has a status, which is shown in the spreadsheet view. You can also view and modify the status by clicking the task to open it in the Post Task dialog box.

The task status can be:

- Pending
- Finished
- Skipped

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**!** If you change the status of a task from Finished to Pending, you must change the percent complete value to 0%.

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## To edit the the default workflow

Before you can edit a workflow, the Advanced List, On-demand Campaign, or Corporate Campaign must not be in the **In Progress** state. If it is, you must pause it.

When you create a new Advanced List, Corporate Campaign, or On-demand Campaign, the system guides you through a wizard based on the template you selected. When you finish with the wizard forms, you might need to customize the default workflow provided by the project's template. The ability to customize default workflows is controlled by your user permissions.

When you open the Workflow tab in edit mode, if any of the toolbar buttons are disabled or the values in the columns are read-only, it means that you do not have the appropriate security permissions to edit the workflow.

1. Open the Advanced List, Corporate Campaign, or On-demand Campaign that has a workflow to set up and open the Workflow tab.

This tab displays the workflow as designed in the template.

2. Click the Edit icon ().
3. Edit the names listed in the first column to change the default task and stage names to specific tasks and stages.

Stages are the headings in bold that group the tasks together.

4. Add any stages or tasks, as necessary.
  - Click the Add a Stage Row icon () to add a stage.
  - To add a user task, click the Add a Task Row icon () and select **User Task**.
5. Enter target dates.
  - You can enter start dates, end dates, and duration for a task. Enter any two, the third value is calculated automatically. For example, if you enter a target start and a target end date, the system calculates the duration.
  - You are not prevented from picking any dates that are not in agreement with the per-task options for non-work-time. For example, even if a task is not scheduled to include weekends, you can still pick a Sunday as an end-date for the task.
6. To specify that a task is a milestone of some sort, for example, a drop date, select the **Milestone Type** column and select a milestone that appears in the drop-down list.

Your administrator can set the milestones that appear in the list.

7. Select members or roles to assign the task to in the **Members** column.
8. Enter any notes about the task in the **Notes** section.
9. Perform one of the following actions.

- Click **Save** to save your changes and remain in edit mode. If you are making extensive edits, it is a best practice to click **Save** occasionally to prevent any loss of work.
- Click **Save and Finish** to save your changes and return to view mode.
- Click **Cancel** to undo any changes and return to view mode.

### Related Topics

- To add a stage or task
- About schedules

## To add roles to tasks

Normally, when you create a Advanced List, On-demand Campaign, or Corporate Campaign, the workflow automatically contains member and reviewer roles for all tasks if the template selected contains this information.

However, you may occasionally need to assign roles to workflow tasks that differ from the template settings.

1. Navigate to the Workflow tab of your project.
2. Click Edit ().
3. Select the **Member Role** cell for the task you wish to assign.
4. Click the turndown icon (▼) to expand the list of available roles, and select the one to assign to this task. Repeat this step until you have assigned all the tasks.
5. Save your work.

## To fill data into a range of cells

You can copy a value in one or more cells to a group of continuous cells above or below the selected cells. This can greatly reduce the data entry time for adding duplicate information. For example, assume you have a workflow that contains ten consecutive tasks all having the same target start. target emd. target duration, and target effort.

You can fill in this data for the first task, then copy the values to all the other tasks, by selecting these four columns for all ten tasks and using **Fill Down**.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign that has the task values to duplicate, and click the **Workflow** tab.
2. Click the Edit icon ().
3. Select the first cell.
4. Mouse over the final cell, then Shift-click over this cell.

A range of cells you selected is highlighted.

- 💡 You must select a continuous range of cells, rather than selecting multiple, disconnected cells.

- Click the Tools icon (  ), and select **Fill Down** or **Fill Up**.
  - Fill Down** copies the values in the top-most cell (or cells) to all the other selected cells, including the bottom-most.
  - Fill Up** copies the values in the bottom-most cell (or cells) to all the other selected cells, including the top-most.

All the selected cells now contain the same value.

Remember to save the workflow to keep your changes.

## To print the Workflow tab

You can print all information found on your Advanced List, On-demand Campaign, or Corporate Campaign **Workflow** tab, or select certain columns of information to print.

- From the Workflow tab, click the Print icon (  ).
 

A window appears with a list of columns from which you can choose to print. By default, all columns are selected.
- Clear any columns you do not want to print.
 

By default, the **Shrink to Fit Landscape Page Width** box is checked.
- Optionally, clear the **Shrink to Fit Landscape Page Width** checkbox to print the columns at a size of 100%.
 

If you keep this option checked, all selected columns print on a single page. If you use this feature, change your printing preference (for this print job) to landscape.
- Click **Print Selected Columns**.
- Click **Print**.
- Select your printer and printer options, then click **Print** to print the selected workflow columns.
 

Choose landscape mode for best results.
- In the preview window, click **Close** to close the print preview.

## To add an attachment to a task

To add attachments for a task, a project owner must enable adding attachments for the task. The following users can add or remove task attachments.

- Task owners only can add attachments to their tasks.

- Task owners and users with the **Delete Attachment** security permission for projects can delete task attachments.

Note the following.

- There is no versioning for task attachments: uploading a new version overwrites the existing version of the attachment.
- It is possible to have multiple task attachments with the same name for the same task. This can occur if multiple owners of the task each upload a file with the same name. You can differentiate the files by the user who created the attachment.
- You can add and remove attachments no matter the state of the task. That is, even if a task is marked complete or skipped, you can still add and remove attachments.
- The Attachments tab for projects is divided into two sections: one for files attached to the project's tasks, and one for files attached directly to the project.
- If a task owner adds task attachments, and later the project owner sets the **Enable Task Attachment** flag to false, nobody would be able to add or remove attachments from the Post Task Update dialog. However, task attachments for the project could still be removed from the project attachment tab.

1. Navigate to the task to which you would like to add an attachment.

Click the task from a project workflow or from the Tasks list page.

The Post Task Update dialog box opens.

2. Click the **Attachments** tab.

The tab displays any attachments that already exist for the task.

3. In the **File to Attach** field, select From **My Computer** , **From the Asset Library** , or **URL**.

4. Do one of the following:

- Click **Browse** to attach on your computer. When the dialog box appears, navigate to the file you want to attach, and click **Open**.
- Enter the URL in the field provided.

5. Add any comments about the attachment.

6. Click **Add More** to display an additional set of fields for each additional attachment you want to add.

7. After you have added all your attachments, click **Save and Return** to close the dialog box.

Any new attachments are added to the **Attachments** tab for the task.

## Managing task dependencies

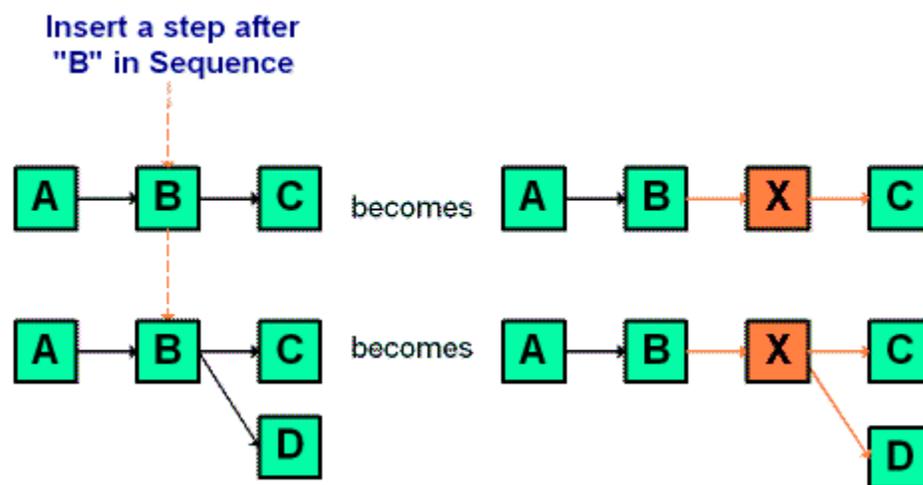
IBM Unica Distributed Marketing has several options for managing dependencies on tasks as new rows are added to the spreadsheet and existing rows are removed.

- **Normal:** no dependencies are automatically created. If you need dependencies for the new tasks and stages, create them manually.
- **Sequential:** insert the new task in an existing chain of tasks.
- **Parallel:** insert a new task branch parallel to an existing chain of tasks.

## Inserting tasks in sequence

Insertion **in sequence** makes the new task dependent on the task before it, and then makes all items that were dependent on that task dependent on the new task.

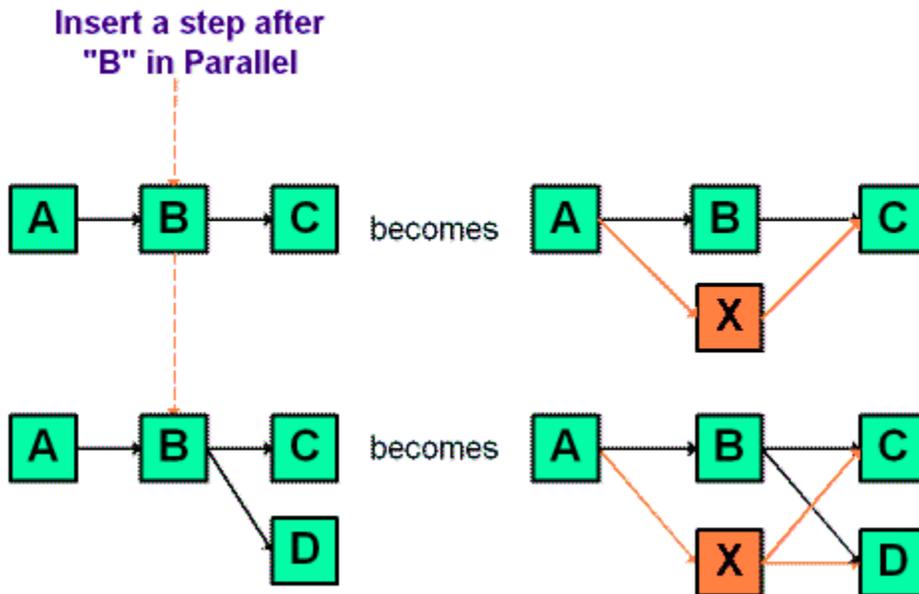
You insert a task in sequence when it can only start after the previous task has completed. For example, in the figure below, if task X cannot be worked on until task B has been completed, you insert task X in sequence.



## Inserting tasks in parallel

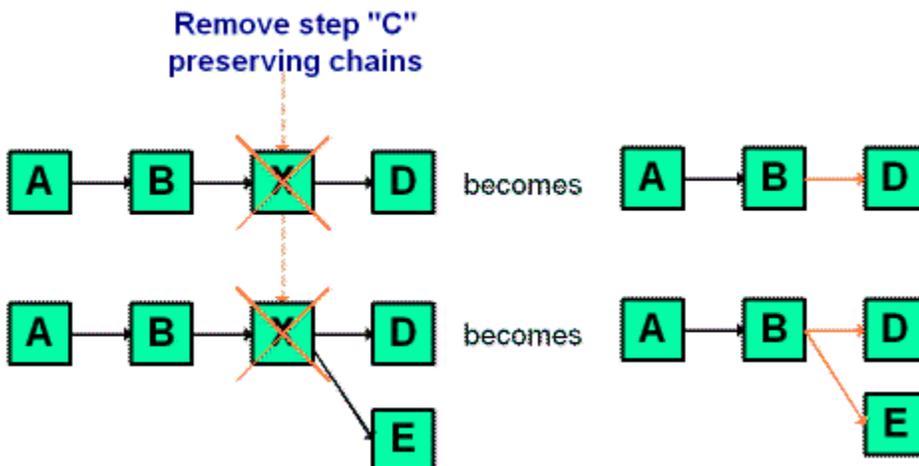
Insertion **in parallel** makes the task dependent on the items (tasks or stages) that the task before it was dependent on, and makes the items dependent on the previous task dependent on the new task as well.

You insert a task in parallel when it can be worked on at the same time as another task. For example, in the figure below, if task X can be worked on simultaneously with task B, you insert task X in parallel.



### Deleting tasks

Deleting a task removes the selected task from the chain, but re-links the two remaining segments of the chain together so that it is one continuous chain again.



When a task is deleted its dependents are made dependent on its dependencies before the deletion takes place. This preserves all sequential chains of dependencies.

### Default and "last used" modes

To make adding a task as simple and consistent as possible, IBM Unica Distributed Marketing provides the following behavior.

- The default mode is "in series;" when you begin an editing session, this is the insertion mode.
- There is a "last used mode," remembered for each editing session. Once you select a mode from the menu, this mode is used each time you add a task during the remainder of your session.

For example, to add several tasks in parallel, you only need to select the **in parallel** mode once; then every time you insert another task, the system inserts it in parallel, unless you explicitly select another mode.

## About adding a stage or task

To add a task or stage to a workflow, your security role must grant you the permission named **Add/Edit/Delete Steps, Dependencies and Targets** for the template you select. If the **Add** button is missing from the toolbar, contact your administrator about obtaining the appropriate access rights.

Note the following about stage and task rows.

- When adding a stage or task, if you place the number of the task in front of the task name, the task is inserted in the place that the number indicates.

For example, if you enter `2.3 Have team meeting` anywhere in the task list, the task is placed under the task labeled 2.2 and the numbers of subsequent tasks shifts, so that the step previously labeled 2.3 is now 2.4.

- You can add a stage or task anywhere in the list and then use the up and down icons on toolbar to move the stage or task to the appropriate place in the list.
- There are several options for managing dependencies on tasks as new rows are added and existing rows are removed.

### Related Topics

- [Managing task dependencies](#)

## About editing a stage or task

If you change the number for a task or stage, the task is inserted before the row matching the new number.

For example, assume the stage order as shown here.

1. Planning
2. Collateral Design
3. Lead Generation
4. Show Setup-to-Breakdown
5. Marketing Review

If you edit task 5, Marketing Review, changing its number to 3, the new order is as follows.

1. Planning
2. Collateral Design
3. Marketing Review
4. Lead Generation

### 5. Show Setup-to-Breakdown

Now suppose you edit task 2, Collateral Design, changing its number to 4. The new order is the following.

1. Planning
2. Marketing Review
3. Collateral Design
4. Lead Generation
5. Show Setup-to-Breakdown

To move a task or stage to the end, give it any number higher than the final task or stage. For example, to move stage 2, Marketing Review to the end, change its number to 6 or higher.

## To add a stage or task

Before adding a stage or task, open a workflow in edit mode.

1. In the workflow, select the stage or task above the place to insert the new stage or task.
2. Add a stage, or standard task.

- Click the Add Stage Row icon (  ) to add a stage.

- Click the Add Task Row icon (  ) to add a standard task.

3. Optionally, to make a task dependent on another task, enter the number of the task it is dependent on after the task in parentheses ( ).

For example, suppose task is named `Generate List`. To make this task dependent upon task 1.3, name the task `2.5 Generate List (1.3)`.

4. When you have finished editing the workflow, save your changes.

The stage or task is added to the workflow, after the insertion point.

If the date of one task changes, it changes the dates of all the dependent tasks.

If a task has more than one dependency, separate the task numbers with commas. For example, use `2.2 Setup Milestone Schedule (1.1, 2.1)`.

## To add a stage or task below a locked task

Before adding a stage or task, open a workflow in edit mode.

If you select a locked task, the insert task/stage links do not work. To add a task directly below a locked task, you must perform the following steps.

1. Navigate to the workflow page to change and click **Edit**.

2. Select any task row that is not locked.
3. Add a stage, standard task, or approval task.

- To add a stage, click the Add Stage Row icon .

- To add a standard task, click the Add Task Row icon .

4. Change the number of the task or stage so that it directly follows the locked task it should follow.

For example, suppose the locked task is `2.5 Review copy - informal (2.3)`. You would set the number of the new task to `2.6`. Once you finish naming the task, the system moves it so it is after task 2.5.

## About milestones

A milestone is a point in time within workflow at which all tasks until that time must be complete in order for work to continue.

If tasks before the milestone are not complete, the milestone is not met, and the next task cannot begin.

### Why use milestones

By using milestones within a workflow, you can better enforce process for your lists and campaigns, so that tasks take place in the intended order. In addition, the specific milestones you select in a workflow aid in reporting.

### Setting milestones in a workflow

You can set milestones for tasks within a workflow for an Advanced List, On-demand Campaign, and Corporate Campaign.

When you set a milestone, the next task in the workflow cannot begin until the milestone is reached.

### Example

For example, the workflow for an On-demand Campaign may consist of the following tasks:

1. Run the flowchart to generate the list of targets.
2. A user task to produce creatives for the campaign.
3. A user task to approve creatives for the campaign.
  - At this task, a milestone called `Creatives Approved` is set.
4. Run the flowchart to fulfill the campaign.

By using a milestone at task 3, you can ensure that all creatives for the On-demand Campaign are approved by the necessary people before campaign fulfillment begins.

## How available milestones are defined

The specific milestones available for selection in a workflow are defined in a database table by your administrator. See the Distributed Marketing installation and administration documentation for more information.

### Related Topics

- To define a milestone for a task

## To define a milestone for a task

Before you can define a milestone for a task:

- Your administrator must have defined milestones in the Distributed Marketing database.
- The **Milestone Type** column must be present in the workflow layout. You can ensure it is present by basing the Advanced List, On-demand Campaign, or Corporate Campaign on a template that uses milestones, or by editing the workflow layout.

You can set a milestone for a task in order to ensure that task is complete before the workflow proceeds.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign, and open the **Workflow tab**.
2. If necessary, change the layout of the spreadsheet view to show the **Milestone Type** column.
3. Click **Edit** to make the workflow spreadsheet editable.
4. In the **Milestone Type** column, in the task row for which you want to set a milestone, select a milestone from the drop-down list.
5. Click **Save** or **Save and Finish** to save the milestone you set.

The milestone is now in effect for the Advanced List, On-demand Campaign, or Corporate Campaign.

### Related Topics

- About milestones

## About schedules

There are two options for scheduling in workflows.

- Baseline

- Up-to-date

## Baseline scheduling

You use baseline scheduling when you want to compare an actual schedule to a fixed target schedule. With baseline scheduling, you never change the target schedule, allowing it to serve as a baseline. Users who are assigned tasks receive reminders on the actual dates.

While working with a baseline schedule, the owner of the Advanced List, On-demand Campaign, or Corporate Campaign sets the initial Target Start and End dates for each task. These dates stay fixed throughout the entire workflow. As the List, On-demand Campaign, or Corporate Campaign progresses, the owner can update the actual dates with real data based on status information received from team members.

## Up-to-date scheduling

You use up-to-date scheduling when you want to establish the schedule as the official schedule that is updated regularly. This mode enables project managers to capture the most up-to-date, official schedule; however, it does not provide easily for viewing a baseline version of the schedule.

## To use a baseline schedule

Before creating your Lists, On-demand Campaigns, or Corporate Campaigns, have the system administrator set up permissions and reminders as follows.

- Set permissions so that only List, On-demand Campaign, or Corporate Campaign owners can update **Target** dates.
- Set reminders (Alerts) based on the **Actual** dates.

While working with a baseline schedule, team members perform the following high-level steps.

1. The owner sets the initial **Target Start** and **End** dates for each task.

These dates stay fixed throughout the entire List, On-demand Campaign, or Corporate Campaign.

2. As the List, On-demand Campaign, or Corporate Campaign progresses, team members update the **Actual** dates with real data.

## To keep an up-to-date schedule

Before creating your Lists, On-demand Campaigns, or Corporate Campaigns, have your system administrator set up permissions and reminders as follows.

- Set permissions so that only List, On-demand Campaign, or Corporate Campaign owners can update Target dates.
- Set reminders (Alerts) based on the Target dates.

- Set reminders to be sent only to the owner or owners.
- Optionally, set reminders on the Actual dates to be sent to team members.

While working with an up-to-date schedule, team members perform the following high-level steps.

1. The owner sets the initial Target Start and End dates for each task.
2. As the List or On-demand Campaign progresses, team members update the Actual dates with real data.
3. Once a task is delayed (the owner receives reminders based on Target dates), the owner assesses the situation and adjusts the Target dates and durations as necessary.

## About date rippling

When you enter or change the date for a task, Distributed Marketing can calculate other dates based on your entry. It uses an internal algorithm to bi-directionally calculate the dates of dependencies, starting with the cell where you entered the date.

When you recalculate dates on a workflow, note the following.

- In addition to factoring in non-work days and hours, date calculations use two additional system-wide properties: start time of day and, number of hours per day. Your system administrator configures these parameters.
- If a task row is anchored, date rippling does not update its dates (even if the date columns are empty).
- Date rippling does not affect active and finished tasks; only tasks with a status of Pending.
- Date rippling observes the per-task options for non-work time. That is, the date rippling algorithm takes into account whether or not a task is scheduled to progress during non-work time and/or weekends.
- Do not log target times outside of business hours if you intend to do date rippling or other automatic calculations afterwards, because that information will be overwritten.

## To automatically calculate workflow dates

When you enter or change the date of a task, Distributed Marketing can calculate other dates based on your entry.

1. Enter or change the date for a task in any of the date fields.
2. Select the date and click anywhere on the screen except for another date field.



The Ripple icon (  ) appears next to the end date.

3. Click the Ripple icon.

Alternatively, you can select one of the toolbar icons for recalculating dependency dates.

The other dates in the workflow change, based on the new entry.

#### Related Topics

- Workflow toolbar
- To ripple dates above a locked task

## To ripple dates above a locked task

If a workflow has a locked task, and you change the date of a task that is located above the locked task, you receive a warning when you attempt to ripple dates.

To clarify this task, the steps below assume the following:

- Task 1.8 is locked.
  - You need to change the duration of task 1.5 from 5 days to 10 days.
  - All tasks are dependent on the previous task.
1. Open the workflow for editing, and change the duration on task 1.5 from 5 days to 10 days.
  2. Click the ripple icon next to the end date of task 1.5.

The system displays a warning message, saying you cannot ripple through the locked row.

3. Click the start date of task 1.8

4. Click the ripple icon ().

The system calculates the dates below the locked task.

## About designing for multiple drops, lots, waves, and offers

- [About designing for multiple drops, lots, waves, and offers](#)
- [About multi-drop design](#)
- [About multi-lot design](#)
- [About multi-wave design](#)
- [About multi-offer design](#)

## About designing for multiple drops, lots, waves, and offers

With Distributed Marketing, you can design Corporate Campaigns, On-Demand Campaigns, and Lists that fulfill a number of business needs.

### Related Topics

- About multi-drop design
- About multi-lot design
- About multi-wave design
- About multi-offer design

## About multi-drop design

Multi-drop Corporate Campaigns, On-Demand Campaigns or Lists are recurring campaigns or Lists that run at specified intervals (each month, for example) over a defined period of time.

Multi-drop campaigns and Lists use a workflow or a workflow stage that is configured to repeat at specified intervals. Each drop, or stage, in the workflow is made up of the tasks necessary to fulfill one complete drop, or stage, of the campaign.

## When to use a multi-drop design

Organizations use multi-drop campaigns or Lists to manage campaigns that span time and require multiple contact points, usually at regular intervals. Examples of multi-drop campaigns are:

- Newsletter campaign—You might create a multi-drop Corporate or On-Demand Campaign to manage distribution of newsletters at regular intervals on an ongoing basis.
- Birthday campaign—You might create a multi-drop Corporate or On-Demand Campaign to manage a campaign where some kind of offer and greeting is sent to contacts during the months of their birthdays.

## Setting up multi-drop Corporate Campaigns, On-Demand Campaigns, and Lists

Multi-drop Corporate Campaigns, On-Demand Campaigns, and Lists use recurring templates. In the multi-drop template, you must:

- Define the stage of your workflow that contains the tasks you want to recur (only one stage can be recurring)
- Define properties for recurrence using the Recurrence tab

Multi-drop design is applied when you create a Corporate Campaign, On-Demand Campaign, or List using the recurring templates you've established.

## About multi-lot design

Multi-lot Corporate Campaign and On-Demand Campaigns are campaigns that distribute the effort of customer contact over time when dealing with a very large list of targeted customers.

### When to use a multi-lot design

Organizations use multi-lot features to manage customer lists that are too large to handle at once. A multi-lot design allows Field Marketers to accept a subset of a list for contact in one "lot." Field Marketers can then accept more contacts for contact at subsequent lots, thereby distributing the effort over time.

## Setting up multi-lot Corporate Campaigns and On-Demand Campaigns

To achieve a multi-lot design, your Corporate Campaigns or On-Demand Campaigns must use flowcharts in Campaign that are designed specifically for each lot. You can use a single flowchart for all lots, or a separate flowchart for each lot. In either case:

- The list generation task for the initial lot selects from your Campaign database to create the first list for Field Marketer review.
- The list generation task for the second lot targets those contacts that were left in the Waiting state after the first list review, as well as any new contacts included from the latest list generation.

## About multi-wave design

A multi-wave design for Corporate Campaigns and On-demand Campaigns allows you to distribute offers through several waves of contact. Multi-wave Corporate Campaigns and On-demand Campaigns are typically nonrecurring campaigns, with workflows made up of different stages, or waves. Multi-wave campaigns take advantage of Campaign response tracking. You can design a "second wave" of offers to be sent to contacts who did not respond to the initial offer.

### When to use a multi-wave design

Use a multi-wave design when you want to manage campaigns that present a series of offers to customers. For example, an organization may want to create a multi-wave Corporate Campaign to:

1. Send an offer to a list of contacts.
2. Send a second offer to contacts who did not respond to the initial offer.

For example, Field Marketers may use the same flowchart each month to identify prospects who have birthdays in the current month. In this case, the first wave of the campaign must complete, so that you can identify the non responders. Once this wave is complete, the second wave of the campaign can be used to distribute the second offers to the non responders.

## Understanding multi-wave Corporate Campaigns and On-Demand Campaigns

To achieve a multi-wave design, your Corporate Campaigns and On-Demand Campaigns must use flowcharts in Campaign that are designed to accommodate each wave of contact. Note that you can use a single flowchart for all waves, or create a separate flowchart for each individual wave. In either case:

- The list generation task for the initial wave selects from your Campaign database and creates the first list for Field Marketer review.
- The list generation task for all subsequent waves should select from only those contacts generated by the previous wave as input. For example, if you want to send an offer to contacts who did not respond to the first wave, the flowchart used for the second wave should filter out the responders and select the non responders from the first wave.

## About multi-offer design

A multi-offer design for Corporate Campaigns, On-Demand Campaigns, and Lists allows you to create a campaign or List that sends different offers to different customers.

Multi-offer Corporate Campaigns, On-Demand Campaigns, or Lists can be nonrecurring or recurring. These campaigns take advantage of the segmenting capabilities in Campaign to target different contact segments with different offers.

## When to use a multi-offer Corporate Campaign, On-demand Campaign, or List

Organizations use multi-offer design to manage campaigns and Lists that target different segments of the customer population. Examples of multi-offer design include:

- Offers for responders and non responders—You might create a multi-offer campaign to provide one offer to those who respond to a campaign, and another separate offer to those who do not respond.
- Offers for different audiences—You might create a multi-offer campaign to manage different offers for different audiences. For instance, a financial institution might send one offer to college students and another offer to individuals who are head-of-household.

## To create a multi-offer On-demand Campaign or List

In most cases, field marketers create multi-offer On-demand Campaigns and Lists by selecting a template in which a corporate marketer or administrator has already set up the necessary segments, flowcharts, and workflows.

The instructions below describe the steps to take before the field marketer actually creates the On-demand Campaign or List, to be performed by others working with Campaign and Distributed Marketing templates.

1. Create flowcharts and forms for your On-Demand campaign or List.  
Ensure the following:
  - The flowcharts create different segments.
  - The Segment Codes are written to the List Manager table.
2. Create an On-Demand campaign or List template and add forms as a custom tab.
3. Modify the workflow.  
For each List Review system task:
  - a. Click the task name.  
The task properties window appears.
  - b. Complete the task properties window as desired.  
In the **Segment Code** field, enter the appropriate segment name as it appears in the flowchart used to create your forms/tabs.
4. Create an On-Demand campaign or List using the template.
5. Start the On-Demand campaign or List.

## Updating and finishing tasks

When you create a task, or open a new workflow with existing tasks, the status of the task or tasks is **Pending**. As project members work on tasks, they update the status to indicate the current progress.

To place a task into any status, ensure the workflow is in edit mode, and click the **Status** column of the task, then choose the appropriate status from the drop-down list

Status	Description
Pending	Indicates a task has not yet started. When you create a task, it defaults to the pending state. The pending state is symbolized by a blank status field.
Active	Indicates a task is in progress. Symbolized by the  icon. You can also type <b>A</b> to place a task in the active state
Skipped	Indicates a task has been skipped. Symbolized by the  icon. Skipped tasks are tasks for which members no longer do work. Any dependencies of this task are also disregarded. You can also type <b>S</b> to place a task in the skipped state.
Finished	Indicates a task has been completed. Symbolized by the  icon. You can also type <b>F</b> to place a task in the finished state.

Note the following behavior.

- If you enter 100 in the **% Complete** column for a task, the status is updated to **Finished**.
- If you enter 0 in the **% Complete** column for a task (if it was previously finished), the status is updated to **Pending**.
- If you enter any number from 1 to 99 in the **% Complete** column for a task (if it was previously finished), the status is updated to **Active**.
- If you mark the status for a task as **Skipped**, all of the dates for the task are cleared. Until you hit **Save** (or **Save and Finish**), you can retrieve the dates by canceling out of the editing session. However, once you save the spreadsheet with the dates cleared, you cannot retrieve them.

## To complete multiple tasks

You have been assigned tasks for one or more Advanced Lists, On-demand Campaigns, or Corporate Campaigns.

1. Open the Tasks list page to view all of your assigned tasks.
2. Select the checkbox for each task you wish to complete.
3. Click **Complete Selected**.
4. In the Complete Selected Tasks dialog box, select one of the radio buttons:
  - **Leave all dates as they are**. The tasks are marked as complete, but no end dates are modified.
  - **Set all actual end dates to now**. Each selected task is marked complete, and its actual end date field is set to the current date and time.
5. Click **Continue** to complete the selected task or tasks, or **Cancel** to return to the list page without making any changes.

Any tasks you selected are removed from the Tasks list page, and their status is changed to Complete. Additionally, their end dates are set, if you selected that option.

## To skip multiple tasks

You can perform this task when you have been assigned tasks for one or more Advanced Lists, Corporate Campaigns, or On-demand Campaigns.

1. Open the Tasks list page to view all of your assigned tasks.
2. Select the checkbox for each task to skip.
3. Click **Skip Selected**.
4. In the confirmation dialog box, click **OK** to skip the selected tasks, or **Cancel** to return to the list page without making any changes.

Any tasks you selected and skipped are removed from the Tasks list page, and their status is changed to Skipped.

## About copying and pasting tasks

When copying and pasting tasks, note the following.

- For copying, you must select a continuous range of tasks, rather than selecting multiple, disconnected tasks (by using Ctrl+click).
- If you do not insert enough blank tasks to correspond to the ones you are copying, existing tasks are overwritten.
- To paste rows at the insertion point, you can click **Paste** from the **Tools** menu or press Ctrl+V. To paste rows after the selected row, you must click **Paste Rows After** from the **Tools** menu.

### To copy tasks in Internet Explorer

You can copy a continuous group of tasks to another place in the same workflow or into the workflow for another Advanced List, On-demand Campaign, or Corporate Campaign.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign that has the tasks to copy and click the **Workflow** tab.
2. Click **Edit**.
3. Select the first source task. If this is the only task you are copying, skip to step 5.
4. Mouse over the final source task, then Shift-click over this task. A range of tasks you selected is highlighted.
5. From the workflow toolbar, select **Copy** from the **Tools** menu item to copy the selected task or tasks.

If you are pasting the tasks into the same workflow, skip to step 7.

6. If you are copying the tasks to another project workflow, navigate to the destination workflow tab, and open it for editing (click its **Edit** link).
7. Optionally, insert enough blank rows below the destination to act as placeholders for the tasks you are copying.

For example, if you are copying 6 tasks, make sure there are 6 blank rows available. If you do not create the necessary rows, existing tasks below the insertion point are overwritten.

8. Click the destination task.
9. From the workflow toolbar, select **Paste** from the **Tools** menu item to paste the task.

The source tasks are placed in the workflow, starting from the selected destination task.

#### Related Topics

- To add a stage or task

## Post task update dialog box

This dialog appears when you click a workflow task in view mode. Use this dialog as a quick alternative to editing the entire workflow, when you only need to update a single task. From this dialog, you can update certain items, add task attachments, as well as adding comments to the revision history of the Advanced List, On-demand Campaign, or Corporate Campaign.

The Post Task Update dialog box contains two tabs, **Status** and **Attachments**.

### Status

The **Status** tab contains the following fields.

Field	Description
Owner(s)	<p>The task owner or owners. At the task level, Advanced List, On-demand Campaign, or Corporate Campaign members are referred to as task owners.</p> <p>That is, in the workflow spreadsheet, you use the <b>Members</b> column to add people to a task; this column refers to Advanced List, On-demand Campaign, or Corporate Campaign members. When you open the task in the <b>Post Task Update</b> screen, these members are listed as Owners (which refers to task owners).</p>
Target Dates	The target start and end dates, as well as the duration for the task. You can edit either or both of the date and time selectors to update the information.
Status	The status of the task. Edit this field by selecting a value from the field's pull down menu.
% Complete	The current progress for the task. Enter a number between 0 and 100 to change the value.
Actual Effort	The effort for the task, measured in days. Enter a value to update the field. This field can contain partial days, for example, 3D-2H-0M
Actual date and time fields	<p>The Actual begin and end dates and times for the task. You can edit either or both of the date and time selectors to update the information.</p> <hr/> <p> Begin and end dates are mandatory; you receive a warning if you attempt to save without entering values for both fields. Additionally, the system checks to ensure the end date is not earlier than the begin date.</p> <hr/>
Comments	<p>Displays comments for the task. You can enter text to update the field.</p> <p>These notes go in to the revision history of the project and any notifications that may be sent about the task.</p>

Field	Description
Enable Task Attachments	A flag to determine whether or not the task can contain attachments. This field is visible to Advanced List, On-demand Campaign, or Corporate Campaign owners only. Check the box to allow the task to contain attachments.

 Make sure you close the dialog box by clicking either **Save and Return** or **Cancel**; if you do not use one of the buttons to close the dialog box, the task may remain locked, and no one else can edit it.

 To change the state of a finished task back to active, you must set both the **Status** to **Pending**, and the **% Complete** field to an integer less than 100. If you do not change both fields, after you close the dialog box, the task is still marked as completed.

## Attachments

The **Attachments** tab contains the following fields.

Item	Description
Current attachments section	<p>The top portion of the page describes the current attachments of the task. It contains three columns of information for each attachment:</p> <ul style="list-style-type: none"> <li>• <b>File:</b> Contains a link to the attachment file and describes the file type and size.</li> <li>• <b>Description:</b> Contains revision history and description for the attachment.</li> </ul> <p> The name of the user who added the attachment is listed. This is important, as the creator differentiates attachments with the same name for the same task.</p> <ul style="list-style-type: none"> <li>• <b>Actions:</b> Contains links for deleting the attachment or for sending the attachment via email.</li> </ul>
File to Attach	Contains a drop-down menu that allows you to specify the source of the file to attach.
Browse	Use this button to browse your computer or the asset libraries for the file to attach.
Comments	Use this text box to add any comments for the attachment.
Attach Selected File	Use this button to attach the selected file or URL.

### Related Topics

- Workflow tab fields

## About the workflow spreadsheet view

When you display the workflow as a spreadsheet (the default), the workflow displays the information about the stages and tasks in your workflow as a list in a spreadsheet. You use this view to update task status, add reviewers, and changes dates, among other tasks.

### Related Topics

- Workflow tab fields
- Workflow toolbar

## About the workflow process flowchart view

The process flowchart view shows displays the tasks in a network diagram style, as follows.

- Each task is displayed as a box with a task number and ID.
- Tasks that have dependencies are connected to any tasks they depend on.
- Sequential tasks are displayed on the same line.
- Parallel task are displayed on different lines.
- Independent/orphan tasks are displayed on their own line, with no connections.

## About the workflow timeline view

The timeline view of the workflow tab presents a view of the List, On-demand Campaign, or Corporate Campaign over a period of weeks or months. To view the project schedule in a timeline view, click the *View as Timeline* icon.

You can customize the timeline view by using the *Layout* link from the workflow tab. Use this dialog box for the following purposes.

- Select the captions, if any, to appear next to each bar in timeline.
- Choose a weekly or monthly view of the timeline.
- Select the types of dates to view.

---

 If you click the **Edit** link from the timeline view, the spreadsheet opens for editing.

---

## Workflow tab layout page

Use this page to set the appearance for both the spreadsheet and timeline views of a workflow tab.

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 To hide the Spreadsheet Layout or Timeline Layout section, click the icon next to the title. To view a hidden section, click the icon.

---

## Spreadsheet layout section

Field	Description
Columns	Check a column to display, or uncheck to hide.
Preset Column groups	<p>Click a link to select one of a preset group of columns to display.</p> <ul style="list-style-type: none"> <li>• <b>All:</b> default setting; all boxes checked (all columns displayed)</li> <li>• <b>Targets:</b> hides Status, % complete, and Actual date columns.</li> <li>• <b>Actuals:</b> hides Target Dates/Effort and Member/Reviewer roles columns.</li> <li>• <b>All dates:</b> displays all columns related to target and actual dates.</li> <li>• <b>Responsibility:</b> displays columns related to who is assigned to complete the tasks.</li> </ul>
First Column Width	<p>Select one of the radio buttons.</p> <ul style="list-style-type: none"> <li>• <b>Remember Last Setting:</b> When viewing the workflow spreadsheet, you may adjust the first column width to see more or less of the task names.</li> <li>• <b>Exactly:</b> Select this button and enter a number to set the column to an exact width in pixels.</li> </ul>

## Timeline layout section

Field	Description
Time Scale	The increment of time used for measurement. Select either <b>Weeks</b> or <b>Months</b> . The default setting is Weeks.
Bars Represent	The bars in the timeline view indicate durations. You can choose to display either Forecast/Actual dates, Target dates, or both. The default is to display both.
Bar Captions	By default, the bars do not have captions. Select one of the choices from the drop down menu to display certain information as bar captions. For example, you can have the task name or milestone type display as a caption.
First Column Width	See the First Column Width description for in the Spreadsheet Layout section above.

## Buttons

Button	Description
Make these the default	<p>Check this box to keep your settings as the default for the workflow. This ensures that whenever you navigate away from and back to this tab, your display setting will not change (until the next time you make changes and check this box).</p> <hr/> <p> These are the defaults for <b>all</b> users, for this workflow, until someone changes the defaults.</p> <hr/>

Button	Description
Apply and Close	Click to apply your changes and close the dialog.
Apply	Click to apply your changes. Your changes display on the workflow, and the dialog remains open for further editing.
Restore Defaults	Restores all settings to their default values, undoing any customizations you have made.
Cancel	Click to close the dialog without changing any settings.

### Related Topics

- To set first column width on workflow spreadsheet

## Workflow tab fields

When the workflow appears in spreadsheet view (the default view), it includes the following fields and columns.

Field	Description
Tasks and stages	<p>Lists the task stages and tasks that comprise the Advanced List, On-demand Campaign, or Corporate Campaign.</p> <p>When in edit mode, click a stage or task to revise or change.</p> <p>When in view mode:</p> <ul style="list-style-type: none"> <li>• Clicking a workflow task opens the <b>Post Task Update</b> screen in a new window.</li> </ul>
Status	The status of the task.
% Complete	<p>The percentage value that represents how complete a task is.</p> <p>When in edit mode, click the measuring bar for a task and enter a number. The measuring bar expands to a comparable level.</p>
Actual Start	<p>After you change a task from Pending to Active, this field represents the Actual Start date. Actual Start dates are in regular font.</p> <p>In edit mode, use the pop-up calendar to select a date and time.</p>
End	<p>After you change a task from Active to Finished, this field represents the Actual End date. Actual End dates are in regular font.</p> <p>In edit mode, use the pop-up calendar to select a date and time.</p>

Field	Description
Dur.	<p>The duration of the task, in days, hours, and minutes.</p> <p>If you enter both start and end dates, the system automatically calculates a value for this field (the End date minus the Actual Start date).</p>
Actual Effort	<p>The actual effort it took to complete the task, as opposed to calendar duration. Effort is measured in days, hours, and minutes.</p>
Anchored Dates	<p>Indicates whether the task is anchored. If a lock appears in this field, the task's dates are anchored.</p> <p>To specify a fixed date for a task, click the column, then select <b>Anchored</b> from the pull down menu. The task date cannot move even if the dates of the tasks it is dependent on change.</p> <p>If a dependency is not met, the dates in conflict appear with a different icon and in a different font.</p> <p>For example, suppose task 2.2 is dependent on task 2.1. If the target end date of task 2.1 is after the target start date of task 2.2, both the target end date of 2.1 and the target start date of 2.2 appear in red, if you anchored the date for task 2.2 by selecting the lock icon in the <b>Anchored Dates</b> column.</p>
Schedule Through	<p>Indicators for which dates to use when determining task dates. The following options are available.</p> <ul style="list-style-type: none"> <li>• <b>Business</b>: indicates this task includes only standard, non-holiday, non-weekend dates. This is the default for all tasks.</li> <li>• <b>Weekends</b>: indicates this task includes weekends. The system includes weekends when it calculates dates for this task.</li> <li>• <b>Off.</b>: indicates this task includes system-wide non-work time that has been defined. The system takes into account these times when it calculates dates for this task.</li> <li>• <b>All</b>: indicates this task includes all dates. No dates are ignored when dates are calculated for this task.</li> </ul>
Target Start	<p>The targeted start date of the task. In edit mode, use the pop-up calendar to select a date.</p>
Target End	<p>The targeted end date of the task. In edit mode, use the pop-up calendar to select a date.</p>
Target Dur.	<p>The actual duration of the task, in days, hours, and minutes. The Target End minus the Target Start dates.</p>
Target Effort	<p>The targeted effort estimated to complete the task, as opposed to calendar duration.</p>

Field	Description
Milestone Type	<p>A task milestone that you choose from a drop-down list. Example options might be Meeting, Event, and Job Start. Plan administrators set the milestone types that appear on the list.</p> <p>For more information on setting up milestones, see the <i>Distributed Marketing Administrator's Guide</i>.</p>
Member Role(s)	<p>A role or roles associated with the task. These can be loaded automatically from the project template used to create the project, or the project owner can set them up manually.</p> <p>When an approval task has a status of In Progress, On hold, or Completed, this field is read-only.</p>
Members	<p>The people associated with the task.</p> <p>If a workflow task has a role in its <b>Member Role(s)</b> column, when you assign people to roles, the workflow automatically adds a person in the corresponding <b>Members</b> column.</p> <p>You can also add people to the Members column manually, while editing the workflow.</p> <p>When you edit the workflow for an approval task, teams are not listed in this field because a team cannot be the owner of the approval task.</p> <p>Typically, standard tasks have members.</p>

### Related Topics

- Updating and finishing tasks

## Workflow toolbar

When the Workflow tab is in edit view, a toolbar appears. You use the buttons on the toolbar to make changes to the workflow. For example, you can insert and delete tasks, add a stage, clear all entries, and so on.

The following table explains each button.

Icon	Description
	<b>Add Task Row.</b> Adds a new people task in the spreadsheet.

Icon	Description
	<p>Click a dependency option</p> <ul style="list-style-type: none"> <li>No dependencies</li> <li>In series</li> <li>In parallel</li> </ul> <p>This option determines how IBM Unica Distributed Marketing behaves when adding new tasks.</p>
	<p><b>Add Stage Row.</b> Adds a new stage in the spreadsheet. Tasks are grouped in stages.</p>
	<p>The Tools menu contains the following choices.</p> <ul style="list-style-type: none"> <li><b>Copy:</b> copies the contents of the selected cells to the clipboard.</li> <li><b>Paste:</b> pastes the contents of the clipboard, beginning at the selected cell.</li> <li><b>Paste Rows After:</b> pastes the contents of the clipboard below the selected row.</li> <li><b>Mark as...:</b> marks the selected task appropriately. For example, selecting <b>Mark as Finished</b> changes the status of the selected task to Finished. You can mark the task Skipped, Finished, Active, or Pending.</li> <li><b>Fill Down/Up:</b> copies a cell's values to a range of cells.</li> <li><b>Clear:</b> erases all entries in the selected cell or group of cells.</li> <li><b>Clear Column:</b> erases all entries in the selected column.</li> </ul> <hr/> <p> The date columns have dependents as follows: if you select Clear Column to erase the Target Start, the Target End column is also erased and vice versa. If you select Clear Column to erase the Forecast/Actual Start, the Forecast/Actual End column is also erased and vice versa.</p> <hr/> <ul style="list-style-type: none"> <li><b>Clear All:</b> erases all entries in the workflow.</li> </ul>
	<p>Click to recalculate dependent dates while preserving slack time. Recalculates all date dependencies based on your changes; leaves any existing slack time between dependent tasks.</p>
	<p>Click to recalculate dependent dates while removing slack time. Recalculates all date dependencies based on your changes; removes any slack time between dependent tasks.</p>
	<p>Click to undo your last change.</p>
	<p>Click to reapply a change you undid with the Undo action.</p>
	<p><b>Move row up.</b> Click to move the selected task or stage upward. If you move a stage, the associated tasks move with it.</p>

Icon	Description
	<b>Move row down.</b> Click to move the selected task or stage downward. If you move a stage, the associated tasks move with it.
	Delete row. Click to delete the selected task or stage. Note the following. <ul style="list-style-type: none"> <li>• If you delete a stage, all of its associated tasks move up one stage.</li> <li>• If you delete the first stage, the first task associated with it becomes the stage for the rest of the tasks.</li> </ul>

### Related Topics

- Managing task dependencies
- To copy tasks in Internet Explorer
- To fill data into a range of cells

## Workflow links

The **Workflow** tab displays the following links.

Link	Description
Breadcrumbs	Click any active link in the breadcrumbs trail to go to that page.  Breadcrumbs (a list of pages you visited prior to arriving at the current page) are located above the List, On-demand Campaign, or Corporate Campaign name.
Edit	Click the  icon to add, remove, or make changes to workflow stages and tasks.
View as spreadsheet	Click the  icon to view the workflow as a spreadsheet.  This view provides access to granular information about a task, presented in table format. For example, you can easily look up a task's status, duration, forecasted end date, and team members using the column headers. This is the default view.
View as timeline	Click the  icon to view the workflow as a timeline.  This view provides a graphic view of information such as task duration and status. From the Project Timeline drop-down menu, select various options such as Dates/Progress to show this information on the timeline.
Layout	Click the  icon to open a dialog for adding and removing columns from the spreadsheet view.

Link	Description
Save as template	<p>Click to save the workflow definition directly into the template library (if you have the permission to do so).</p> <p>A dialog is presented to allow you to name the template. For more details, see the <i>Distributed Marketing Administrator's Guide</i>.</p>
Tasks and stages	<p>In the spreadsheet view, tasks are links that behave as follows:</p> <ul style="list-style-type: none"> <li>Clicking an approval tasks pops up the summary page for the approval in a new window.</li> <li>Clicking a workflow task pops up the Post Task Update dialog in a new window.</li> </ul>

### Related Topics

- To edit the the default workflow
- About the workflow spreadsheet view
- About the workflow timeline view
- Workflow tab layout page
- Post task update dialog box

## To change the layout of the workflow

You can change the layout of the spreadsheet and timeline views of the workflow to display the information that you need.

1. In the **Workflow tab**, click **Layout**.

The Instance Workflow Tab Layout dialog box opens.

2. In the **Spreadsheet Layout** section, select the checkboxes of all columns you want to show in the workflow.

You can also use the links after **Columns to display**: to select subsets of available columns.

3. Set the first column width for the spreadsheet view.
4. In the **Timeline Layout** section, select values from the **Time Scale**, **Bars Represent**, and **Bar Captions** drop-down lists.
5. Set the first column width for the timeline view.
6. To have these settings apply only to the currently opened workflow, as opposed to all workflows you view, check **Use these settings for current workflow only**.
7. Click **Apply** or **Apply and Close** to save your selections.

The view of the workflow is updated to reflect your selections.

### Related Topics

- To set first column width on workflow spreadsheet

## To set first column width on workflow spreadsheet

You can change the width of the first column in the workflow spreadsheet view, and keep this setting for your entire session. That is, your changes remain after you navigate to other pages and subsequently return to this tab.

1. Navigate to the **Workflow** tab of the Advanced List, On-demand Campaign, or Corporate Campaign.
2. Use the column width control to resize the first column to your preferred width.
3. Click the **Layout** link in the top right section of the screen.
4. In the **Instance Workflow Tab Layout** dialog, do the following:
  - a. In the **First Column Width** section, select the **Remember Last Setting** radio button.
  - b. At the bottom of the dialog, check the **Make these the default settings for this project's workflow tab** box.
5. Click **Apply and Close** to save your changes and close the dialog.

The first column width is now set for this Advanced List, On-demand Campaign, or Corporate Campaign, for the remainder of your session; no matter which pages you navigate to, when you navigate back to this workflow tab, the first column width remains as you set it.

# 7 Working with Lists and On-demand Campaigns

- Working with Lists, On-demand Campaigns, and Corporate Campaigns
- To modify the default contents of the Lists, On-demand Campaigns, and Corporate Campaigns pages
- To modify how Lists, On-demand Campaigns, and Corporate Campaigns are displayed
- To view specific Lists, On-demand Campaigns, or Corporate Campaigns
- To open and edit a List, On-demand Campaign, or Corporate Campaign
- List, On-demand Campaign, and Corporate Campaign status
- To view and edit the Summary page
- To print a List, On-demand Campaign, or Corporate Campaign
- To export a List, On-demand Campaign, or Corporate Campaign
- To copy a List, On-demand Campaign, or Corporate Campaign
- About attachments
- To post a message
- To delete Lists, On-demand Campaigns, or Corporate Campaigns

## Working with Lists, On-demand Campaigns, and Corporate Campaigns

This section contains common information on working with Lists, On-demand Campaigns, and Corporate Campaigns. The content in this section applies to each of these objects, as the instructions are the same. For example, you delete a List, On-demand Campaign, or Corporate Campaign in the same way; therefore information on deleting these objects is presented together.

Where necessary, differences between Lists, On-demand Campaigns, and Corporate Campaigns are noted.

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- 💡 You may not have the necessary permissions to perform all tasks described in this section, or you may have permissions to perform the task on some objects, but not others. For example, field marketers can typically make changes to Lists and On-demand Campaigns, but can only view Corporate Campaigns. For more information, see your administrator.
-

## To modify the default contents of the Lists, On-demand Campaigns, and Corporate Campaigns pages

When you select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns** from the **Local Marketing** menu, a page opens listing those objects.

You can change which Lists, On-demand Campaigns, or Corporate Campaigns are displayed by default, as well as the columns included in the page.

1. While viewing the Lists, On-demand Campaigns, or Corporate Campaigns page, click the Options icon (  ).

The Options dialog box opens.

2. In the Default drop-down list, select the set of Lists, On-demand Campaigns, or Corporate Campaigns that you want shown by default when you open that page.
3. Determine which columns to show by selecting columns from the **Available Columns** list and **Selected Columns** list and using the horizontal arrow keys to move columns between lists.

Continue until the columns you want to display are all in the **Selected Columns** list.

4. Determine the order of columns by selecting columns in the **Selected Columns** list and using the vertical arrow keys to move columns up and down.

Continue until the columns are in the desired order.

5. Click **Save Changes**.

The Lists, On-demand Campaigns, or Corporate Campaigns page changes to reflect your selections. These changes remain in effect when you view the page later.

## To modify how Lists, On-demand Campaigns, and Corporate Campaigns are displayed

When you select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns** from the Navigation pane, a page opens listing those objects. The exact content of this page depends on settings defined by your administrator.

You can change how Lists, On-demand Campaigns, or Corporate Campaigns are displayed in a multiple ways.

1. To change how objects are displayed, click the View icon (  ).

The Set View Options dialog box opens.

You can select:

- **Timeline**, to show the objects in a table format.
- **Text Calendar**, to show the objects as text entries in the calendar.
- **Graphical Calendar**, to show the objects as graphics in the calendar.

You also select the time period and color coding.

To return to the table view, click the object name in the Navigation pane.

2. To sort the objects when viewing as a table, click the name of the column to sort by. You can click the name again to switch between ascending and descending order.

The number of objects may be too high for a single screen. If there are multiple screens, you can click the screen number to view at the bottom of the table to see other objects, or you can click **Show All** to fit all objects in one screen.

#### Related Topics

- To view specific Lists, On-demand Campaigns, or Corporate Campaigns

## To view specific Lists, On-demand Campaigns, or Corporate Campaigns

When you select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns** from the **Local Marketing**, a page opens listing those objects. The exact content of this page depends on settings defined by your administrator.

You can change which Lists, On-demand Campaigns, or Corporate Campaigns are displayed in multiple ways.

1. To view all objects, click **All ...** at the top of the page.

All objects are displayed, as well as various filters for the display, for example, **Last Weeks ...**, **My ...**, and **Completed ...**. You can click on a filter name to see only objects that meet that criteria.

2. To view objects that meet certain criteria, click the Filter icon (  ).

The Search for dialog box opens.

3. Fill in the search criteria you need, then click **Apply**.

#### Related Topics

- To modify how Lists, On-demand Campaigns, and Corporate Campaigns are displayed

## To open and edit a List, On-demand Campaign, or Corporate Campaign

You must have the required permissions to open and edit a List, On-demand Campaign, or Corporate Campaign. See your administrator for more information.

You can open a List, On-demand Campaign, or Corporate Campaign from the Dashboard, or from the page listing that object.

Once you open a List, On-demand Campaign, or Corporate Campaign, you can edit any of its tabs.

1. Click the name of the List, On-demand Campaign, or Corporate Campaign.  
The Summary tab for that object opens.
2. Click the name of the tab you want to edit, or remain on the Summary tab to edit it.  
For example, if you need to edit the Workflow, you must open the Workflow tab before you click Edit.

3. Near the top of the page, next to the object's name, click the Edit icon ().
4. Edit the contents of the tab as necessary.
5. Click **Save Changes**.

Edits you made to the tab are saved.

## List, On-demand Campaign, and Corporate Campaign status

A List, On-demand Campaign, or Corporate Campaign is in one of the following states:

- Not Started
- In Progress
- Paused
- Cancelled
- Finished

Simple Lists begin in the In Progress state.

Advanced Lists, On-demand Campaigns, and Corporate Campaigns, whether recurring or not, begin in the Not Started state.

## To change the Lists, On-demand Campaigns, or Corporate Campaign status

The status of the List, On-demand Campaign, or Corporate Campaign is shown in the Home page, the pages listing these objects, and in the Summary page. To change the status, you must be viewing the List, On-demand Campaign, or Corporate Campaign Summary page.

1. View the Summary page for the List, On-demand Campaign, or Corporate Campaign.

2. Click the Status icon ().

3. From the drop-down list, select the status to change to.

A dialog box prompts you to add comments about the status change.

4. Add a comment and click **Continue** to close the dialog box.

The status of the List, On-demand Campaign, or Corporate Campaign changes to your selection.

### Related Topics

- To view and edit the Summary page
- List, On-demand Campaign, and Corporate Campaign status

## To view and edit the Summary page

You can edit some, but not all, data on the Summary page for a List, On-demand Campaign, or Corporate Campaign.

1. Open the List, On-demand Campaign, or Corporate Campaign to view the Summary page.

2. Click the Edit icon ().

Certain fields in the Summary page become editable. For example, fields that you can typically edit are:

- Name
- Description
- Security Policy
- Target Start and Target End dates
- Other custom attributes created by your administrator

Typically, you cannot edit campaign codes or List Review data.

3. Edit data as necessary.

4. Click **Save Changes**.

The Edit Summary page closes, and the changes you made are reflected in the Summary page.

## To print a List, On-demand Campaign, or Corporate Campaign

When viewing a List, On-demand Campaign, or Corporate Campaign, you can print it on your local printer.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the Print icon () , and select **Print**.

The Print dialog box opens.

3. Complete the Print dialog box as needed.

## To export a List, On-demand Campaign, or Corporate Campaign

When viewing a List, On-demand Campaign, or Corporate Campaign, you can export it to a Microsoft Excel file.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the Print icon () , and select **Export**.

The File Download dialog box opens.

3. Click **Open** to open the Microsoft Excel file directly, or **Save** to save it to your computer.

If you choose to save it, you are prompted for the location on your computer.

## To copy a List, On-demand Campaign, or Corporate Campaign

When viewing a List, On-demand Campaign, or Corporate Campaign, you can copy it to create a new one with the same settings.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the Copy icon () .

- You are prompted to confirm the copy.
3. Click **OK**.
- The Summary page for the new List, On-demand Campaign, or Corporate Campaign opens. The name of the new object is *Copy of existing object name*.
4. Edit information in the Summary page as needed.
  5. Click **Save Changes**.
- The object closes.
6. To edit other pages in the List, On-demand Campaign, or Corporate Campaign, open and edit the object.

### Related Topics

- To open and edit a List, On-demand Campaign, or Corporate Campaign

## About attachments

You can include attachments with a List, On-demand Campaign, or Corporate Campaign. These attachments provide information that is relevant to the campaign or List.

For example, corporate or field marketers may include the following as attachments:

- Marketing messages for the initiative, including content for a mail campaign
- Data, such as customer names, generated after running a List or On-demand Campaign

A List or On-demand Campaign owner or participant can include attachments only if the corporate template developers include the Attachments tab in the List or On-demand Campaign templates.

If the template developer includes attachments in the On-demand Campaign templates, field marketers or corporate marketers can use the attachments to help fulfill campaigns.

Corporate marketers can also add attachments to an On-demand Campaign when the Attachments tab is available through the On-demand Campaign template.

## To add an attachment to a List, On-demand Campaign, or Corporate Campaign

If the template designer has allowed it, when viewing a List, On-demand Campaign, or Corporate Campaign, you can add a file as an attachment.

The file you add can come from your computer, or a URL.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Open the Attachments page.
3. Click the Add Attachments icon (  ).
4. In the **File to Attach** field, select **From My Computer** or **URL**.
5. In the field to the right, enter the path to the file.  
If you selected From My Computer, you can click **Browse** to visually find the file on your computer.
6. Optionally, add notes about the attachment.
7. Click **Save Changes**.

The file is attached to the List, On-demand Campaign, or Corporate Campaign.

## To remove an attachment from a List, On-demand Campaign, or Corporate Campaign

1. Open the List, On-demand Campaign, or Corporate Campaign.
2. Open the Attachments page.
3. In the row for the attachment to remove, click **Remove**.  
You are prompted to confirm the deletion.
4. Click **OK**.

The file is no longer attached to the List, On-demand Campaign, or Corporate Campaign.

## To post a message

When viewing a List, On-demand Campaign, or Corporate Campaign, you can post a message. This message is associated with the List, On-demand Campaign, or Corporate Campaign only. You have the option of having these messages sent to other Distributed Marketing users. You may need to post messages to convey to others working on the List, On-demand Campaign, or Corporate Campaign to convey important information about the project.

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 These messages are separate from alerts. An alert is created when you create a message, but the alert does not contain the content of your message.

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1. Open the List, On-demand Campaign, or Corporate Campaign.
2. While viewing any page of the List, On-demand Campaign, or Corporate Campaign, click the Communicate icon (  ), then select **Post a Message**.  
The Messages dialog box opens.
3. Enter your message in the message field.

4. Select the delivery option.
5. Click **Post Message**.

The message is then associated with the List, On-demand Campaign, or Corporate Campaign. If indicated, it is also e-mailed to users.

For those working with the List, On-demand Campaign, or Corporate Campaign, the number next to the Communicate icon (  ), indicating that the new message is there.

### Related Topics

- To read messages

## To read messages

Other Distributed Marketing users may attach messages to a List, On-demand Campaign, or Corporate Campaign in order to pass on important information to other team members. When you view the List, On-demand Campaign, or Corporate Campaign, you can view these messages.

 These messages may also have been e-mailed to you, if the other users chose this option.

1. Open the List, On-demand Campaign, or Corporate Campaign.

The number of messages associated with the List, On-demand Campaign, or

Corporate Campaign is indicated next to the Communicate icon (  ). In this example, there is one message to read.

2. Click , then select **Read Messages**.

The Messages dialog box opens, listing the messages associated with the List On-demand Campaign, or Corporate Campaign.

 You can post a new message from this dialog box.

3. Click **Close** when finished.

### Related Topics

- To post a message

## To delete Lists, On-demand Campaigns, or Corporate Campaigns

You must have the required permissions to delete a List, On-demand Campaign, or Corporate Campaign. Typically, field marketers cannot delete Corporate Campaigns. See your administrator for more information.

1. From the **Local Marketing** menu, click **Lists, On-demand Campaigns, or Corporate Campaigns**.

The page listing that object type opens.

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 To complete this task, you must view the objects in the Timeline view.

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2. Check the field next to the name of one or more List, On-demand Campaign, or Corporate Campaign you want to delete.

You can also check the field next to the Name column header at the top of the table to select all currently displayed objects.

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 Checking this field selects only those object currently displayed on screen. If the list of objects spans multiple pages, those objects on other pages are not selected.

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3. Click the Delete icon ().

You are prompted to confirm the deletion.

4. Click **OK**.

The selected objects are deleted.

## To delete a List, On-demand Campaign, or Corporate Campaign

You must have the required permissions to delete a List, On-demand Campaign, or Corporate Campaign. Typically, field marketers cannot delete Corporate Campaigns. See your administrator for more information.

While viewing a List, On-demand Campaign, or Corporate Campaign, you can delete it.

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 You can also delete multiple Lists, On-demand Campaigns, or Corporate Campaigns from the pages listing each of these objects.

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1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the Delete icon ().

You are prompted to confirm the deletion.

3. Click **OK** to delete the object.

The List, On-demand Campaign, or Corporate Campaign is deleted.

# 8 Alerts

- Alerts
- To subscribe to alerts for an object
- Viewing alerts

## Alerts

You can use alerts to communicate information to specific people about the state of an object or about an action that the user needs to take. Default alert subscriptions are set by administrators, but can be overridden on a per-object basis by owners and participants of the specific objects.

### Related Topics

- To subscribe to alerts for an object

## To subscribe to alerts for an object

You can override default settings within a List, On-demand Campaign, or Corporate Campaign even if you are not an administrator, which allows you to control the alerts that each object owner and participant receives. However, if there are permissions configured for any of the tabs of a List, On-demand Campaign, or Corporate Campaign, the system filters alerts appropriately.

1. Open the object for which you want to change alert subscriptions.
2. Click the **Communicate** icon (  ) and select **Subscribe to Alerts** from the drop down list.
3. From the list of alerts, select the checkboxes that correspond to the alert that you want to change. You can set or clear alert subscriptions for each type of user, **Owner**, **Participant**, and so on. The possible entries are as follows:
  - Checkmark: indicates the user will receive the alert or alarm
  - Blank: indicates the user will not receive the alert or alarm
  - n/a: indicates you did not specify users for this access level when you created the object. Once you add a users with the corresponding access level, you can set alerts for that access level.

- Click **Accept** to save your changes or **Cancel** to leave the alert settings as they were.

## Viewing alerts

When you receive an alert, go to the Alerts page to view it. Alerts are also sent to affected users' e-mail addresses (for each user that has a valid e-mail address set up).

To view alerts, log in and click the Alerts icon (). Clicking on, or scrolling over the alerts icon shows a drop down menu separating the alerts for your installed applications. The number of alerts appears to the left of each application name. Once you choose which application's alerts to view, the page displays the following information:

Column	Description
Page heading	Contains the number of unread alerts (which appears in parentheses) and the total number of alerts
Check box	Each alert contains a check box; use check boxes to select alerts for a specific action (for example to mark a group of alerts for deletion).  Check the box in the first line (next to the Message Text label) to select all the alerts.
Message text	Displays the text of the alert.
Date/Time	Displays the time of the event that triggered the alert.

You can perform the following actions from the page.

Link/Button	Description
	Select the yellow envelope icon next to an alert to mark the alert as read.  After you click the icon, the alert is grayed out. Reselect the icon to mark the alert as unread.
Alert title	Click the link in the alert to go to the object that is the subject of the alert.   The Alerts page remains open while you view the information in a separate window.
Pages	Click a page number to list the corresponding page of alerts.
Delete Selected	Click to delete the selected alerts.
Delete All	Click to delete all of your alerts.

## 8 - Alerts

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Link/Button	Description
Mark All as Read	Click to mark all your alerts as read, graying out each alert. A confirmation screen appears to ensure you wish to mark all alerts as read.
Mark All as Unread	If you have no unread alerts, click this link to mark all your alerts as unread.
Close	Click to close the Alerts page.