

Manager Reference: Marketing

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.1 Main

.1.1 main

id:[DOCMKT4179] image:

Welcome THE ADMINISTRATOR!
2006-05-01 15:31:33.781

English (United States)

Accounting Catalog Content Example Facility Manufacturing **Marketing** Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Edit Marketing Campaign
[Create Marketing Campaign](#)

Marketing Campaign Id	Campaign Name	Parent Campaign Id	
9000	eCommerce Site Internal Campaign		[Delete]
9001	Pay Per Click Advertising		[Delete]
9002	Affiliate Sites		[Delete]

W3C CSS W3C XHTML 1.0

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Identify an existing Marketing Campaign from this table. Click the ID number to edit.

.1.2 Redirection

The Main tab is not used. Upon opening the Marketing Manager application, your first screen is under the Campaign tab with a table of existing Campaigns. Either select one of the campaigns to edit (by clicking on the Marketing Campaign ID), Create a new Marketing Campaign, or choose another tab.

.2 Data Source

.2.1 FindDataSource

id:[DOCMKT4182] image:

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OFBiz.org

Welcome THE ADMINISTRATOR!
2006-05-01 15:35:35.437

English (United States) Set

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Data Source Data Source Type

Edit Data Source

Create Data Source

Data Source Id	Description	Data Source Type Id	
ECOMMERCE_SITE	eCommerce Site Profile Maintenance	Website Data Entry	Delete
GENERAL_MAILING	General Interest Mailing List Signup	Mailing List Signup	Delete
CSR_ENTRY	Customer Service Rep Data Entry	Administrative Data Entry	Delete
GEN_ADMIN	General Administrative Data Entry	Administrative Data Entry	Delete
USER_ENTRY	User Entry	Content and Data Resource Creation	Delete
CONTEXT_INDUCTION	Context Induction	Content and Data Resource Creation	Delete
BLOG_SITE	Blog Site	Website Data Entry	Delete
ECM	Ecommerce Content	Content and Data Resource Creation	Delete

W3C CSS W3C XHTML 1.0

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Click on the Data Source ID to edit. This screen is a directory that appears when you select the Data Source tab.

.2.2 link buttons

[Delete] [Create Data Source] [DataSource] [DataSource Type]

.2.3 Table of existing Data Sources

.2.3.1 Data Source ID

Generally a one-word ID as used in calls. Click on this to edit the Data Source.

.2.3.2 Description

The purpose or application for the Data Source.

.2.3.3 Data Source Type ID

New Types can be developed under the Data Source Type sub-tab.

.2.4 Link to Create a Data Source

.2.4.1 EditDataSource-new



Welcome THE ADMINISTRATOR!
2006-05-01 16:25:20.328

English (United States)

Accounting | Catalog | Content | Example | Facility | Manufacturing | **Marketing** | Order | Party | Shark | WebTools | WorkEffort

Marketing Manager Application

Main | Data Source | Marketing Campaign | Tracking | Segment | Contact List | Reports | Logout

Data Source | Data Source Type

Add New Data Source

Data Source Id

Data Source Type Id Administrative Data Entry

Description



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Basically the same screen as EditDataSource, below, except that you will specify the ID to be used.

.2.5 Edit Data Source

.2.5.1 EditDataSource

id:[14010] image:



Welcome THE ADMINISTRATOR!
2006-05-01 16:28:40.906

English (United States)

Accounting | Catalog | Content | Example | Facility | Manufacturing | **Marketing** | Order | Party | Shark | WebTools | WorkEffort

Marketing Manager Application

Main | Data Source | Marketing Campaign | Tracking | Segment | Contact List | Reports | Logout

Data Source | Data Source Type

Edit Data Source

Data Source Id CONTEXT_INDUCTION -[cannot change without re-creating]-

Data Source Type Id Content and Data Resource Creation

Description Context Induction



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Edit an existing Data Source at this screen.

.2.5.2 link buttons

[Create Data Source] [Save] [Data Source] [Data Source Type]

.2.5.3 Data Source ID

Cannot be changed. This is the identity used by the system when a Data Source is required.

.2.5.4 Data Source Type ID (drop-down box)

You can instantly create a new Data Source Type after clicking on the Data Source sub-tab.
Types of Data Source initially included are: <P> Administrative Data Entry
 Content and Data Resource Creation
 Contest Signup
 Mailing List Signup
 Purchased Data
 Website Data Entry

.2.5.5 Description

In a few succinct words, describe the function or purpose of the Data Source here. This field can always be edited.

.2.6 Edit Data Source Type

.2.6.1 FindDataSourceType

id:[14017] image:

The screenshot shows the OFBiz Marketing Manager Application interface. At the top left is the OFBiz.org logo. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-05-01 16:58:48.109' and a language dropdown set to 'English (United States)'. Below this is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing (selected), Order, Party, Shark, WebTools, and WorkEffort. The main content area has a blue header 'Marketing Manager Application' and a sub-header 'Main | Data Source | Marketing Campaign | Tracking | Segment | Contact List | Reports | Logout'. The 'Data Source' sub-tab is active, showing 'Data Source Type' as the selected view. Below this, there are links for 'Edit Data Source Type' and 'Create Data Source Type'. A table with columns 'Data Source Type Id' and 'Description' is visible. At the bottom, there are W3C CSS and XHTML 1.0 validation logos, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Click on the [Create Data Source Type link to create a new Data Source Type.

.2.6.2 link buttons

[Create Data Source Type] [Delete] [Edit] [Data Source] [Data Source Type]

.2.6.3 Data Source Type ID

The name of the Data Source Type.

.2.6.4 Description

What the Data Source Type is all about.

.2.6.5 Create Data Source Type link

.2.6.5.1 EditDataSourceType



Welcome THE ADMINISTRATOR!
2006-05-01 16:54:51.859

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Data Source Data Source Type

Add New Data Source Type

Data Source Type Id Miscellaneous

Description Data from any other Source

Save



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Create your new Data Source Type at this screen. The name cannot be changed later, only the description.

.2.6.5.2 link buttons

[Save] [Data Source] [Data Source Type]

.2.6.5.3 Data Source Type ID

Give a descriptive name here, short and succinct.

.2.6.5.4 Description

What is the purpose or function of this Data Source Type?

.3 Marketing Campaign

.3.1 FindMarketingCampaign

id:[DOCMKT4193] image:

The screenshot shows the OFBiz Marketing Manager Application interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing (selected), Order, Party, Shark, WebTools, and WorkEffort. Below the navigation bar is a blue header for the Marketing Manager Application, with sub-tabs for Main, Data Source, Marketing Campaign (selected), Tracking, Segment, Contact List, Reports, and Logout. The main content area is titled "Edit Marketing Campaign" and contains a table of existing campaigns. The table has columns for Marketing Campaign Id, Campaign Name, Parent Campaign Id, and a [Delete] link. The table lists three campaigns: 9000 (eCommerce Site Internal Campaign), 9001 (Pay Per Click Advertising), and 9002 (Affiliate Sites). Below the table are logos for W3C CSS and W3C XHTML 1.0. At the bottom, there is a copyright notice: "Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz". A footer box contains the text: "Existing Campaigns are shown here; click on the Marketing Campaign ID to edit."

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Welcome THE ADMINISTRATOR!
2006-05-01 17:51:58.218

English (United States) Set

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Edit Marketing Campaign

Create Marketing Campaign

Marketing Campaign Id	Campaign Name	Parent Campaign Id	
9000	eCommerce Site Internal Campaign		[Delete]
9001	Pay Per Click Advertising		[Delete]
9002	Affiliate Sites		[Delete]

W3C CSS W3C XHTML 1.0

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Existing Campaigns are shown here; click on the Marketing Campaign ID to edit.

.3.2 link buttons

[Create Marketing Campaign] [Delete]

.3.3 Table of existing campaigns

.3.3.1 Marketing Campaign ID

Click on the ID number to edit the campaign.

.3.3.2 Campaign Name

What you are calling the Campaign.

.3.3.3 Parent Campaign ID

If this Campaign is a sub-set or child of another identified Campaign, here is the ID of the Parent.

.3.4 Edit

Click on the Campaign ID or the [Edit] link to bring up the editing screen.

.3.4.1 Existing Marketing Campaign

.3.4.1.1 EditMarketingCampaign



Marketing Campaign Role(s)

[Edit Marketing Campaign](#)
[Create Marketing Campaign](#)

Marketing Campaign Id -[cannot change without re-creating]-

Parent Campaign Id

Campaign Name

Campaign Summary

Cancel



Return to an existing Campaign to edit it at this screen.

.3.4.1.2 link buttons

[Create Marketing Campaign] [Save] [Cancel / Done] [Campaign] [Roles]

.3.4.1.3 Marketing Campaign ID

This is automatically generated; cannot be changed.

.3.4.1.4 Parent Marketing Campaign (drop-down box)

All the existing Campaigns are listed on the drop-down box, making it easy to reassign this one campaign to another parent if you need to.

.3.4.1.5 Campaign Name

The name by which you know this campaign.

.3.4.1.6 Campaign Summary

Summarize the target, method and aims of the Campaign in this box.

.3.4.2 New Marketing Campaign

.3.4.2.1 EditMarketingCampaign-new



Welcome THE ADMINISTRATOR!
2006-05-01 17:58:52.484

English (United States)

Accounting Catalog Content Example Facility Manufacturing **Marketing** Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Add New Marketing Campaign

Parent Campaign Id

Campaign Name

Campaign Summary

Cancel



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Create a new Campaign starting with the name and summary at this screen.

.3.4.2.2 link buttons

[Save] [Cancel / Done]

.3.4.2.3 Parent Campaign ID (drop-down box)

If there is a Parent campaign, select it from the drop-down box.

.3.4.2.4 Campaign Name

Give the Campaign a name which will differentiate it from other Campaigns.

.3.4.2.5 Campaign Summary

Summarize the target, method and aims of the Campaign in this box.

.3.5 Roles

.3.5.1 FindMarketingCampaignRoles



Welcome THE ADMINISTRATOR!
2006-05-02 07:54:15.015

English (United States)

Accounting Catalog Content Example Facility Manufacturing **Marketing** Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Marketing Campaign Role(s)

Edit Marketing Campaign Role

Create Marketing Campaign Role

Marketing Campaign Id	Party ID	RoleType ID		
10000	[MARKETING]	Department	Edit	[Delete]
10000	[MARKETING]	Internal Organization	Edit	[Delete]



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Roles for the selected Campaign are listed here. Click [Edit] to change or Delete to remove.

.3.5.2 link buttons

[Create Marketing Campaign Role] [Edit] [Delete] [Marketing Campaign] [Roles]

.3.5.3 Table of existing roles

.3.5.3.1 Marketing Campaign ID

The number assigned to identify the Marketing Campaign.

.3.5.3.2 Party ID

Party assigned to a role in this Campaign.

.3.5.3.3 Role Type

The Role played by the Party in this Campaign.

.3.5.4 Tool to add Party in a Role

.3.5.4.1 EditMarketingCampaignRoles



Marketing Manager Application

Main | Data Source | Marketing Campaign | Tracking | Segment | Contact List | Reports | Logout

Marketing Campaign **Role(s)**

Edit Marketing Campaign Role
[Create Marketing Campaign Role](#)

Marketing Campaign Id -[cannot change without re-creating]-

Party ID

RoleType ID

Cancel

Status History

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Add a Party in a Role to this Marketing Campaign. You come to the same screen to Edit the Role.

.3.5.4.2 link buttons

[Create Marketing Campaign Role] [Save] [Cancel / Done] [Marketing Campaign] [Role(s)]

.3.5.4.3 Marketing Campaign ID

The assigned number ID for the Marketing Campaign to which you are adding Role assignments.

.3.5.4.4 Party ID (popup search tool)

Use the popup or enter the Party ID for each Party to be associated with this Campaign.

.3.5.4.5 Role Type (drop-down box)

Use the drop-down box to select the appropriate Role for the Party to play with this Campaign.

.4 Tracking

.4.1 FindTrackingCode

id:[10052] image:

The screenshot shows the 'Marketing Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing (selected), Order, Party, Shark, WebTools, and WorkEffort. Below the navigation bar, there is a header for 'Marketing Manager Application' with sub-tabs: Main, Data Source, Marketing Campaign, Tracking (selected), Segment, Contact List, Reports, and Logout. The main content area displays a 'List Tracking Code' section with a 'Create Tracking Code' link. Below this is a table with the following data:

Tracking Code Id	Description	Tracking Code Type Id	Marketing Campaign Id	TrackingCodeProdCatalogId	
9000	PPC Campaign 1	External	Pay Per Click Advertising		Delete
9001	PPC Campaign 2	External	Pay Per Click Advertising		Delete
9002	PPC Campaign 3	External	Pay Per Click Advertising		Delete
9010	Affiliate 1	External	Affiliate Sites		Delete
9011	Affiliate 2	External	Affiliate Sites		Delete
9012	Affiliate 3	External	Affiliate Sites		Delete

Below the table, there are logos for W3C CSS and W3C XHTML 1.0. At the bottom, there is a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A footer box contains the text: 'Table with all current Tracking Codes. Click on the Tracking Code ID to view or edit.'

.4.2 link buttons

[Create New TrackingCodeType] [Delete] [Tracking Code] [Tracking Code Type]

.4.3 Tracking Codes List

.4.3.1 ID

The ID assigned when the Tracking Code was created.

.4.3.2 Type

This could be Internal, External, or Partner Managed.

.4.3.3 Description

The explicit description of what this Code identifies.

.4.3.4 Campaign

Which Marketing Campaign this Tracking Code is associated with.

.4.4 Tracking Code Type

.4.4.1 FindTrackingCodeType



Welcome THE ADMINISTRATOR!
2006-05-02 09:05:15.593

English (United States)

Accounting | Catalog | Content | Example | Facility | Manufacturing | **Marketing** | Order | Party | Shark | WebTools | WorkEffort

Marketing Manager Application

Main | Data Source | Marketing Campaign | Tracking | Segment | Contact List | Reports | Logout

[Tracking Code](#) | [Tracking Code Type](#)

List Tracking Code Type

[Create Tracking Code Type](#)

Tracking Code Type Id	Description	
INTERNAL	Internal	Delete
EXTERNAL	External	Delete
PARTNER_MGD	Partner Managed	Delete



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Table of current Tracking Code Types. Click on the ID to edit.

.4.4.2 link buttons

[Create Tracking Code Type] [Delete] [Tracking Code] [Tracking Code Type]

.4.4.3 Tracking Code Type ID

Click on the ID (name) to edit.

.4.4.4 Description

One or two words to describe the ID Type.

.4.4.5 Edit or Create New Tracking Code Type

.4.4.5.1 EditTrackingCodeType



Welcome THE ADMINISTRATOR!
2006-05-02 09:05:15.593

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

List Tracking Code Type

Tracking Code Type Id	Description	
INTERNAL	Internal	<input type="button" value="Delete"/>
EXTERNAL	External	<input type="button" value="Delete"/>
PARTNER_MGD	Partner Managed	<input type="button" value="Delete"/>



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When creating a new Type ID, you specify the ID; when editing, only the Description can be changed.

.4.4.5.2 link buttons

[Create Tracking Code Type] [Save] [Tracking Code] [Tracking Code Type]

.4.4.5.3 Tracking Code Type ID

Tracking Code Type ID is created by you here when the Type is new; if editing, you cannot change this.

.4.4.5.4 Description

What the Type is for or about.

.4.5 New TrackingCode

.4.5.1 EditTrackingCode-new



Marketing Manager Application

Add New Tracking Code

Tracking Code Id
Description
Comments
Tracking Code Type Id
Marketing Campaign Id
Default Product Catalog Id -[No override (co-brand) if empty]-
From Date
Thru Date
Redirect URL -[No redirect if empty]-
Override Logo URL -[No override (co-brand) if empty]-
Override CSS URL -[No override (co-brand) if empty]-
Trackable Lifetime -[Seconds]-
Billable Lifetime -[Seconds]-
Group Id
Sub-Group Id



A new Tracking Code is begun here. Specify what you know at the time; editing will finish the task later.

.4.5.2 link buttons

[Save] ****[Tracking Code] [Tracking Code Type] ****

.4.5.3 TrackingCode ID

Whatever you enter here will be assigned as the TrackingCode ID. If this same code is needed by the customer to qualify for a promotion, make it easy for them to use.

.4.5.4 Description

The explicit description of what this Code identifies. One or two words is best.

.4.5.5 Comments

Whatever details you need to pass on to others or to remind yourself can be recorded here. This will not be seen by the customers.

.4.5.6 TrackingCode Type (drop-down box)

Select from one of these options:
 Internal
 External
 Partner Managed

.4.5.7 Marketing Campaign ID (drop-down box)

Associate this Tracking Code with a Marketing Campaign by selecting it from the drop-down box. The same Code could be used in more than one Marketing Campaign.

.4.5.8 Default Product Catalog ID

(No override (co-brand) if empty) means that, if you wish to co-brand, you need to enter the default Catalog ID here.

.4.5.9 From Date/Time (popup calendar)

Date/Time must be in format '2006-03-02 08:00:00.0'. This should be the time of effectivity for the Tracking Code, not just the time when this code is created. In other words, if the Tracking Code is a metric for the performance of the Marketing Campaign, the Campaign itself has a beginning and an ending. The effectivity of the Tracking Code should properly reflect the corresponding time frame.

.4.5.10 Thru Date/Time (popup calendar)

Date/Time must be in format '2006-06-05 23:59:59.9'. This will be the expiration date and time for the Tracking Code. In other words, if an event is recorded with this Tracking Code after this time, it will be outside the period of performance and will not be measured in the results of the campaign.

.4.5.11 Redirect URL

'(No redirect if empty)' means that if you wish to redirect your customer with this Tracking Code, you must enter the Redirect URL here.

.4.5.12 Override Log URL

(No override (co-brand) if empty) means that, if you wish to co-brand, you need to enter the URL here.

.4.5.13 Override CSS URL

(No override (co-brand) if empty) means that, if you wish to co-brand, you need to enter the URL here.

.4.5.14 Trackable Lifetime

How many seconds of presence will you need to record.

.4.5.15 Billable Lifetime

How many seconds of billable time is needed.

.4.5.16 Group ID

If there is an associated Group, enter its ID here.

.4.5.17 Sub-Group ID

If there is an associated Sub-Group, enter its ID here.

.4.6 Tracking Code

.4.6.1 EditTrackingCode



Marketing Manager Application

Edit Tracking Code

[Create Tracking Code](#)

Tracking Code Id 9001 -[cannot change without re-creating]-

Description

Comments

Tracking Code Type Id

Marketing Campaign Id

Default Product Catalog Id -[No override (co-brand) if empty]-

From Date

Thru Date

Redirect URL -[No redirect if empty]-

Override Logo URL -[No override (co-brand) if empty]-

Override CSS URL -[No override (co-brand) if empty]-

Trackable Lifetime -[Seconds]-

Billable Lifetime -[Seconds]-

Group Id

Sub-Group Id



When an existing Tracking Code is selected for view or edit, this screen provides the tools and presents the data.

.4.6.2 link buttons

[Create Tracking Code] [Save] [Tracking Code] [Tracking Code Orders] [Tracking Code Visits] [Tracking Code Type]

.4.6.3 Discussion

Similar to New TrackingCode, discussed above, except the link buttons are here for [Tracking Code Orders] and [Tracking Code Visits] as well. The fields are the same as described above; please see the information you need there.

.4.7 Tracking Code Orders

.4.7.1 FindTrackingCodeOrders



Welcome THE ADMINISTRATOR!
2006-05-02 09:51:57.531

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Tracking Code Tracking Code Orders Tracking Code Visits Tracking Code Type

List Tracking Code Order for Tracking Code Id=9001

Tracking Code Id	Order Id	Tracking Code Type Id	Is Billable ?
------------------	----------	-----------------------	---------------



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When the Tracking Code is associated with the Order Process, all orders where it was used will be reported here.

.4.7.2 link buttons

[View] [Tracking Code] [Tracking Code Orders] [Tracking Code Visits] [Tracking Code Type]

.4.7.3 Tracking Code ID

Click on the ID to view or edit.

.4.7.4 Order ID

Click on the ID number to view the Order.

.4.7.5 TrackingCode Type ID

Was this an Internal, External or Partner Managed Tracking Code Type.

.4.7.6 Is Billable

Yes or No - do we owe somebody for referring this customer or this purchase to us?

.4.8 Tracking Code Visits

.4.8.1 FindTrackingCodeVisits



Welcome THE ADMINISTRATOR!
2006-01-10 13:31:18.14

English (United States)

Accounting Catalog Content Example Facility Manufacturing **Marketing** Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Tracking Code Tracking Code Orders Tracking Code Visits Tracking Code Type

List Tracking Code Visit for Tracking Code Id=1234

Visit Id Source Id From Date



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Table with all Visits that can be related to the selected Tracking Code; click the Visit ID to view details of the Visit.

.4.8.2 link buttons

[View] [Tracking Code] [Tracking Code Orders] [Tracking Code Visits] [Tracking Code Type]

.4.8.3 Visit ID

The system assigns a Visit ID to every access of the ecommerce server. Click on this ID number to learn about the Party whose visit created the event.

.4.8.4 Source ID

What directed or provided the path for the Visit by this Party to this specific page in your Catalog?

.4.8.5 From Date

This gives you the Time that the Visit began. You can determine how long the visit lasted by viewing the Visit ID.

.4.9 Tracking Code Type

Previously discussed, above.

.5 Segment

.5.1 Find

.5.1.1 FindSegmentGroup

id:[12486] image:

WELCOME THE ADMINISTRATOR!
2006-05-02 10:06:02.109

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Find Segment Group

[Create New Segment Group](#)

Segment Group Id	Segment Group Type Id	Description	Product Store Id	
10000	Market Segment	Those customers brought to the e-commerce site	9000	Delete
10001	Sales Segment	Those repeat customers returning to e-commerce 2nd time	9000	Delete
10002	Market Segment	Customers using marketing discounts in retail store	9100	Delete
10003	Sales Segment	Those customers buying without using a marketing code	9100	Delete

W3C CSS W3C XHTML 1.0

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Identify an existing Segment Group from this table. Click the ID number to edit or view.

.5.1.2 link buttons

[Create New Segment Group] [Delete]

.5.1.3 Segment Group ID

Click on this to edit.

.5.1.4 Segment Group Type ID

Which type of segment is this one a part of.

.5.1.5 Description

Defines this Group over all others.

.5.1.6 Product Store ID

Which of your Stores is this Segment associated with.

.5.2 Segment

.5.2.1 viewSegmentGroup



Marketing Manager Application

Segment Group Id 10001 -[cannot change without re-creating]-
Segment Group Type Id
CatalogProductStore
Description



View or edit the Segment Group here. You cannot change the Segment Group ID, but anything else can be modified.

.5.2.2 link buttons

[Create New Segment Group] [Save] [Segment] [Classification] [Geo] [Role]

.5.2.3 Segment Group ID

Assigned when the Segment Group was created. This cannot be changed.

.5.2.4 Segment Group Type ID (drop-down box)

For example, the Sales Segment, the Market Segment, the ecommerce segment, the Retail Outlet Segment, etc. Whatever major Segment types have already been identified in the system will be listed in the drop-down box.

.5.2.5 Catalog Product Store (popup search tool)

The Store associated with this Segment. Select from the drop-down box.

.5.2.6 Description

How this Segment is differentiated from all others.

.5.2.7 Create New Segment Group

.5.2.7.1 viewSegmentGroup-new



Welcome THE ADMINISTRATOR!
2006-05-02 10:26:10.421

English (United States)

Accounting | Catalog | Content | Example | Facility | Manufacturing | **Marketing** | Order | Party | Shark | WebTools | WorkEffort

Marketing Manager Application

Main | Data Source | Marketing Campaign | Tracking | Segment | Contact List | Reports | Logout

Edit Segment Group

Segment Group Type Id

CatalogProductStore

Description



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Creating a new Segment Group is simplified with drop-down boxes to help make the selections.

.5.2.7.2 link buttons

[Save]

.5.2.7.3 Segment Group Type ID (drop-down box)

Select from the drop-down box.

.5.2.7.4 Product Store ID (drop-down box)

Select from the drop-down box.

.5.2.7.5 Contact List Description

How this Segment Group is differentiated from all others.

.5.3 Classification

.5.3.1 listSegmentGroupClass



Marketing Manager Application

[List Segment Group Classifications](#)

SegmentGroupPartyClassificationGroupId	
10000	<input type="button" value="Delete"/>

[Create New Segment Group Classification](#)

PartyPartyClassificationGroupId



A Segment Group's association with an existing Classification is listed here. Classification Groups are created in the Party Mgr.

.5.3.2 link buttons

[Create New Segment Group Classification] [Delete] [Save] [Find] [Segment] [Classification] [Geo] [Role]

.5.3.3 SegmentGroup PartyClassificationGroupId

The Classification Group to which this Segment has been assigned. In this example pictured here, '10000' equates to a Parent Group - 'Internet Marketing.'

.5.3.4 PartyParty ClassificationGroupID (popup search tool)

Select an existing Party Classification Group from the popup search tool.

.5.3.5 lookupPartyClassificationGroup

Party Classification Group Id Equals Begins With Contains Is Empty Ignore Case

Party Classification Type Id

Parent Group Id Equals Begins With Contains Is Empty Ignore Case

Description Equals Begins With Contains Is Empty Ignore Case

	Party Classification Type Id	Parent Group Id	Description
10000	ORGANIZATION_CLASSIF	10000	Internet Marketing
10002	PERSON_CLASSIFICATIO		Those Persons who are customers.
10010	PERSON_CLASSIFICATIO	10002	Those persons who are both Employees and Customers
10001	PERSON_CLASSIFICATIO	10002	Those persons who are customers but not employees.

Use the popup to find an existing Party Classification Group; these are created in the Party manager.

.5.4 Geo

.5.4.1 listSegmentGroupGeo

id:[12495] image:



Welcome THE ADMINISTRATOR!
2006-05-02 10:40:13.421

English (United States)

Accounting Catalog Content Example Facility Manufacturing **Marketing** Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

[Segment](#) [Classification](#) [Geo](#) [Role](#)

[List Segment Group Geos](#)

Geo ID	
United States [Code:US][ID:USA]	Delete
Utah [Code:UT][ID:UT]	Delete

[Edit Segment Group Geo](#)

CommonGeoId

W3C CSS W3C XHTML 1.0

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Geographical areas assigned to an existing Segment Group are listed here.

.5.4.2 link buttons

[Create New Segment Group] [Delete] [Save] [Segment] [Classification] [Geo] [Role]

.5.4.3 Geo ID

This is the geographical area as selected from the lookup tool, below.

.5.4.4 Edit Segment Group Geo

.5.4.4.1 CommonGeoID (popup search tool)

Use the popup to identify the Geographical Area within which the Segment is based.

.5.4.4.2 Common Geo ID

Use the popup tool to locate the code for the geographical area, typically by country. Hint: just enter USA or your state or country name in the Geo ID field of the lookup tool and check 'Ignore Case;' it should work!

.5.4.4.3 lookupGeo

Geo ID Equals Begins With Contains Is Empty Ignore
 Case

Geo Type ID Equals Begins With Contains Is Empty Ignore
 Case

Name Equals Begins With Contains Is Empty Ignore
 Case

Code Equals Begins With Contains Is Empty Ignore
 Case

Secondary Code Equals Begins With Contains Is Empty Ignore
 Case

Abbreviation Equals Begins With Contains Is Empty Ignore
 Case

Geo ID	Geo Type ID	Name	Code	Secondary Code	Abbreviation
BR-AC	State	Acre	AC		
AFG	Country	Afghanistan	AF	004	
IT-AG	Province	Agrigento	AG		
AL	State	Alabama	AL		
BR-AL	State	Alagoas	AL		
AK	State	Alaska	AK		
AKHI	Group	Alaska/Hawaii	AKHI		
AHUST	Group	Alaska/Hawaii/Territories	AHUST		
ALB	Country	Albania	AL	008	
AB	Province	Alberta	AB		
IT-AL	Province	Alessandria	AL		
DZA	Country	Algeria	DZ	012	
BR-AP	State	Amapá	AP		
BR-AM	State	Amazonas	AM		
AS	State	American Samoa	AS		
ASM	Country	American Samoa	AS	016	
IT-AN	Province	Ancona	AN		
AND	Country	Andorra	AD	020	
AGO	Country	Angola	AO	024	
AIA	Country	Anguilla	AI	660	

1 - 20 of 463

Lookup the Geographical boundaries of this Segment Group here.

.5.4.4 link buttons

[Lookup]

.5.5 Role

.5.5.1 listSegmentGroupRole



Marketing Manager Application

[Segment](#) [Classification](#) [Geo](#) [Role](#)

[Create New Segment Group](#)

List Segment Group Roles

Party ID	RoleType ID	
Marketing department	MARKETING	Internal Organization <input type="button" value="Delete"/>

Edit Segment Group Role

Party Id

Role Type Id



Roles of a Party or Party Group for the Segment Group are listed, deleted and added here.

.5.5.2 link buttons

[Create New Segment Group] [Delete] [Save] [Segment] [Classification] [Geo] [Role]

.5.5.3 Party ID

Click on this to Edit the Party in the Party Manager.

.5.5.4 Role Type ID

The assigned Role Type for this Party within the Group Segment.

.5.5.5 Edit Segment Group Role

.5.5.5.1 Party ID

Enter if known or use the popup search tool.

.5.5.5.2 Role Type ID (drop-down list)

Select from the drop-down list.

.6 ContactList

.6.1 Find Contact List

.6.1.1 ListContactLists

id:[12540] image:

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Welcome THE ADMINISTRATOR!
2006-05-02 14:45:02.828
English (United States) Set

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Edit Contact List
Create New Contact List

Contact List Id	Contact List Name	Is Public ?	Contact List Type Id	Contact Mechanisism Type Id	Marketing Campaign Id
9000	New Product Announcements	Y	Announcement	Email Address	eCommerce Site Internal Campaign
9010	Product Tips Newsletter	Y	Newsletter	Email Address	eCommerce Site Internal Campaign

W3C CSS W3C XHTML 1.0

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When you first select the Contact List tab, this table of existing Contact Lists appears; click a Contact List ID to view or edit.

.6.1.2 link buttons

[Create New Contact List]

.6.1.3 Contact List ID

Click on this number to view or edit.

.6.1.4 Contact List Name

The name by which you know the List.

.6.1.5 Is Public?

Can the information be divulged to others?

.6.1.6 Contact List Type ID

Whether this is for marketing, a newsletter, announcements, etc.

.6.1.7 Contact Mech Type ID

Do you reach them by email, phone, postal mail, etc.

.6.1.8 Marketing Campaign ID

Which Marketing Campaign this list is associated with.

.6.2 Add a new Contact List

.6.2.1 EditContactList-new

id:[12549] image:

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Welcome THE ADMINISTRATOR!
2006-05-02 14:47:55.953
English (United States)

Accounting Catalog Content Example Facility Manufacturing **Marketing** Order Party Shark WebTools WorkEffort

Marketing Manager Application
Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Add Contact List

Contact List Name

Contact List Type Id

Is Public?

Contact Mechanism Type Id

Marketing Campaign Id

Owner Party Id

Verify Email From

Verify Email Screen

Verify Email Subject

Verify Email WebSite Id

W3C CSS W3C XHTML 1.0

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Create a new Contact List from this screen. Enter what you know now; complete it later in the Edit screen.

.6.2.2 link buttons

[Save]

.6.2.3 Contact List Name

The name by which you know the List.

.6.2.4 Contact List Type ID (drop-down box)

Is this an Announcement, a Marketing mailing, a Newsletter, or something else? Select from the drop-down box.

.6.2.5 Is Public? (Y/N)

Can the information be divulged to others?

.6.2.6 Contact Mechanism Type ID (drop-down box)

Which of the registered Contact Mechanisms for the Parties will be used to reach the recipient? Select from the drop-down list which includes: <P> Electronic Address
 Email Address
 Internet Domain Name
 Internet IP Address
 Phone Number
 Postal Address
 Web/URL Address

.6.2.7 Marketing Campaign ID (drop-down list)

Which Marketing Campaign is this Contact List associated with? All of the existing Marketing Campaigns are given on

the drop-down list.

.6.2.8 Owner Party ID (popup search tool)

Enter the Party ID of the person, group or organization responsible for this Contact List. Use the popup search tool if needed.

.6.2.9 Verify Email From

When the Communication is by email, what is the email address where you will receive a copy (BCC) of the communication to verify that the transmission was successful?

.6.2.10 Verify Email Screen

When the Communication is by email, what is the electronic address of the screen where you will verify that the transmission was successful?

.6.2.11 Verify Email Subject

When the Communication is by email, what is the subject of the message used when you will verify that the transmission was successful?

.6.2.12 Verify Email WebSite ID

When the Communication is by email, what is the Objective WebSite to which they will be directed?

.6.3 Edit Contact List

.6.3.1 EditContactList



Marketing Manager Application

Contact List | Parties | Comm Events

Edit Contact List

[Create New Contact List](#)

Contact List Id 9010 -[cannot change without re-creating]-

Contact List Name

Contact List Type Id

Is Public ?

Contact Mechanism Type Id

Marketing Campaign Id

Owner Party Id

Verify Email From

Verify Email Screen

Verify Email Subject

Verify Email Web Site Id



Edit an existing Contact List from this screen. Follow the tabs for more options.

.6.3.2 link buttons

[Save] [Create New Contact List] [Contact List] [Parties] [Comm Events]

.6.3.3 Contact List ID

Cannot be changed.

.6.3.4 Contact List Name

The name by which you know the List.

.6.3.5 Contact List Type ID (drop-down box)

Is this an Announcement, a Marketing mailing, a Newsletter, or something else? Select from the drop-down box.

.6.3.6 Is public? (Y/N)

Can the information be divulged to others?

.6.3.7 Contact Mechanism Type ID (drop-down box)

Which of the registered Contact Mechanisms for the Parties will be used to reach the recipient? Select from the drop-down list which includes: <P> Electronic Address
 Email Address
 Internet Domain Name
 Internet IP Address
 Phone Number
 Postal Address
 Web/URL Address

.6.3.8 Marketing Campaign ID (drop-down box)

Which Marketing Campaign is this Contact List associated with?

.6.3.9 Owner Party ID (popup search tool)

Enter the Party ID of the person, group or organization responsible for this Contact List. Use the popup search tool if needed.

.6.3.10 Verify Email From

When the Communication is by email, what is the email address where you will receive a copy (BCC) of the communication to verify that the transmission was successful?

.6.3.11 Verify Email Screen

When the Communication is by email, what is the electronic address of the screen where you will verify that the transmission was successful?

.6.3.12 Verify Email Subject

When the Communication is by email, what is the subject of the message used when you will verify that the transmission was successful?

.6.3.13 Verify Email WebSite ID (drop-down box)

When the Communication is by email, what is the Objective WebSite to which they will be directed?

.6.4 Parties

.6.4.1 Find ContactList Party

.6.4.1.1 FindContactListParties



Marketing Manager Application

Contact List Parties Comm Events

Find Contact List Parties

Create New Contact List Party

Contact List Id Equals Begins With Contains Is Empty Ignore Case

Party Id

From Date Equals Same Day Greater Than From Day Start Greater Than

Less Than Up To Day Up Thru Day Is Empty

Thru Date Equals Same Day Greater Than From Day Start Greater Than

Less Than Up To Day Up Thru Day Is Empty

Status

Preferred Contact Mechanism



Search for an existing Contact List Party from this screen. Specify the List, then enter Party parameters and choose radio buttons.

.6.4.1.2 link buttons

[Create New Contact List Party] [Find] [Contact List] [Parties] [Comm Events]

.6.4.1.3 Contact List ID

The number established by the system when the Contact List was created. This is all you really need to return the full list. If you know the number, enter it. If the number was automatically populated from earlier activity, or once the correct number is in this field, click on [Find] and that Contact List will appear with a listing of all the included Parties. <P> To narrow your search to a specific member of the List, enter data relative to the party's addition to the list. Use the Radio Button search parameters of <l>Equals, Begins With, Contains,</l> or <l>Is Empty</l> to define your entry. Check the box <l>Ignore Case</l> to prevent an entry in UPPER CASE from being rejected as different from a record in lower case.

.6.4.1.4 Party ID (popup search tool)

Enter the ID of the Party associated with the Contact List if you need to search on this parameter.

.6.4.1.5 From Date and Thru Date (popup calendars)

Use the popup calendars to bracket the dates when the Contact List was created or scheduled to expire if you need to search on these parameters. <P> Both the From and the Thru dates each have two popup calendars with these search parameters: <l>Equals, Same Day, Greater Than From Day Start, Greater Than</l>, and the other side with <l>Less Than, Up To Day, Up Thru Day</l> and <l>Is Empty</l>. Use the Radio Buttons together with the 4 calendars to isolate the sought Party by determining when the Party was associated with the Communication Event (the 'From' calendars) or when the association was set to expire (the 'Thru' calendars).

.6.4.1.6 Status (drop-down box)

Apply the Status of a Contact List Party if that would be useful in your search.

.6.4.1.7 Preferred Contact Mechanism (popup list)

Use the popup list to enter the Contact Mechanism if that would be useful in your search.<P> NOTE: You must have already entered a Party ID which has previously-established Contact methods with the Party Manager.

.6.4.2 List of Parties

.6.4.2.1 ListContactListParties

id:[13361] image:

The screenshot shows the Marketing Manager Application interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing (selected), Order, Party, Shark, WebTools, and WorkEffort. Below the navigation bar is a header for the Marketing Manager Application with sub-tabs: Main, Data Source, Marketing Campaign, Tracking, Segment, Contact List (selected), Reports, and Logout. The main content area has three buttons: Contact List, Parties (selected), and Comm Events. Below these buttons is a link for 'Edit Contact List' and a button for 'Create New Contact List Party'. A table displays the following data:

Party Id	From Date	Thru Date	Status	Preferred Contact Mechanism	
Demo Buyer [DemoBuyer]	2006-05-02 15:40:05.406		Pending Acceptance		Edit
Demo Customer [DemoCustomer]	2006-05-02 15:39:06.593		Pending Acceptance		Edit
Demo Sales Rep for Specified Stores Only [DemoRepStore]	2006-05-02 15:39:52.375		Pending Acceptance		Edit

Below the table are logos for W3C CSS and W3C XHTML 1.0. At the bottom, there is a copyright notice: Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org, Powered By OFBiz.

Click the [Edit] link to view or edit the Contact List Party.

.6.4.2.2 link buttons

[Edit] [Create New Contact List Party] [Contact List] [Parties] [Comm Events]

.6.4.2.3 Discussion

The table of established Parties as found when the previous search was performed. See the topics discussed below for an explanation of each of the fields. Click on [Edit] to view or change the details with any Contact List Party.

.6.4.3 Edit Contact List Party


.6.4.3.1 EditContactListParty


Marketing Manager Application


Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout


Contact List Parties Comm Events

Edit Contact List Party
 Create New Contact List Party


Party Id 

From Date 



Thru Date 

Status 

Opt-In Verify Code

Preferred Contact Mechanism 

Status History
 2006-05-02 15:39:06.703 Pending Acceptance [by: admin] [code: 7779630941]

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 Powered By OFBiz

Edit or Create a new Contact List Party from this screen. The Opt-In Verify Code is mandatory for Acceptance Status change.

.6.4.3.2 link buttons

[Create New Contact List Party] [Save] [Contact List] [Parties] [Comm Events]

.6.4.3.3 Party ID (popup search tool)

The Party you wish to have associated with this Contact List. Use the popup search tool to find the Party ID, if needed.

.6.4.3.4 From Date (popup calendar)

The date this party is associated with this Contact List. Use the popup calendar to assign any date other than Now.

.6.4.3.5 Thru Date (popup calendar)

If the association of this Party with the Contact List is to expire, this is the date for that expiration.

.6.4.3.6 Status (dropdown box)

Use the drop-down box to enter a status of the progress of this addition to the Contact List. For the Acceptance status to be allowed, the correct Opt-In code must be given in the next field.

.6.4.3.7 Opt-In Verify Code

This code is usually required to ensure spamming does not take place.

.6.4.3.8 Preferred Contact Mechanism

The popup search tool presents all the Contact Mechanisms on record in the Party Manager for this Party ID; select the one preferred for this Contact List.

.6.4.3.9 Status History

Whenever there is a change in the Status for this Party, the change is reported in this section of the screen.

.6.5 Comm Events

.6.5.1 Find Comm Event

.6.5.1.1 FindContactListCommEvents

id:[12573] image:

The screenshot shows the 'Marketing Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing (selected), Order, Party, Shark, WebTools, and WorkEffort. Below this is a sub-navigation bar with tabs for Main, Data Source, Marketing Campaign, Tracking, Segment, Contact List (selected), Reports, and Logout. The main content area has three tabs: Contact List, Parties, and Comm Events (selected). The page title is 'Page Title Find Contact List Comm Event' and there is a link 'Create New Contact List Comm Event'. The form contains the following fields and options:

- Contact List Id:** A text input field containing '9010'.
- Communication Event Id:** A text input field with a popup search icon.
- From Date:** A date input field with a calendar icon.
- Thru Date:** A date input field with a calendar icon.
- Search Parameters:** Radio buttons for 'Equals', 'Same Day', 'Greater Than From Day Start', 'Greater Than', 'Less Than', 'Up To Day', 'Up Thru Day', and 'Is Empty'. 'Same Day' is selected for both From Date and Thru Date.
- Find:** A button to execute the search.

At the bottom of the application, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Find existing Comm Events with this tool. Enter just the Contact List ID to return all Events for that List.

.6.5.1.2 link buttons

[Create New Contact List Comm Event] [Find] [Contact List] [Party] [Comm Event]

.6.5.1.3 Contact List ID

The Table in the following screen will appear with all existing Comm Events associated with this Contact List if you will enter the Contact List ID number and press [Find].

.6.5.1.4 Communication Event ID (popup search box)

This is what you are really looking for with the rest of the search fields. If you know it or use the popup search tool and enter it here, click [Find] and that Comm Event will appear as in the following table.

.6.5.1.5 From and Thru Dates (popup calendars)

Use the popup calendars to bracket the dates when the Comm Event was created or scheduled to expire if you need to search on these parameters. <P> Both the From and the Thru dates each have two popup calendars with these search parameters: <l>Equals, Same Day, Greater Than From Day Start, Greater Than</l>, and the other side with <l>Less Than, Up To Day, Up Thru Day</l> and <l>Is Empty</l>. Use the Radio Buttons together with

the 4 calendars to isolate the sought Event by determining when the Communication Event was created or scheduled (the 'From' calendars) or when the Event was set to expire (the 'Thru' calendars).

.6.5.2 Contact List Comm Events

.6.5.2.1 ListContactListCommEvents

id:[13364] image:

The screenshot shows the OFBiz Marketing Manager Application interface. At the top, there is a navigation menu with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. The Marketing Manager Application header includes a language dropdown set to English (United States) and a 'Set' button. Below the header, there are tabs for Contact List, Parties, and Comm Events. The main content area displays a table titled 'List Contact List for contactListId=9010' with a link to 'Create New Contact List Comm Event'. The table has the following data:

Communication Event Id	Party From	Party To	Status	Contact Mechanism Type Id	PartyRoleTypeIdFrom	PartyRoleTypeIdTo	{uiLabelMap.ServiceMgmtCustRequestId} - PartyCommEventSubject	Start Date	Finish Date/Time
10020	Blog Editor [BLOG_EDITOR]	Carla Consultant [10021]	Entered		Blog Editor	Contractor	February Newsletter	2006-01-05 08:15:23.312	

At the bottom of the screenshot, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz.

An existing Communication Event when selected for the Contact List ID provides much useful information in this table.

.6.5.2.2 link buttons

[Create New Contact List Comm Event] [Contact List] [Parties] [Comm Events]

.6.5.2.3 Communication Event ID

Click on the ID number to view or edit.

.6.5.2.4 Party From

The Party which generated the Comm Event.

.6.5.2.5 Party To

The recipients of the Comm Event. This could be a Party Group which would include many individual Parties.

.6.5.2.6 Status

Where is this Comm Event in the sequence of steps? Status might include: <P> Entered
 Pending
 Read
 In Progress
 Complete
 Resolved
 Referred
 Cancelled

.6.5.2.7 Contact Mechanism Type ID

Which method of communication was used in this event? This could be email, postal, telephone, fax, etc.

.6.5.2.8 Party Role Type ID From

When the Party originated the Comm Event, what was their Role Type at the time? Was it Marketing acting as a Department, the person in charge of the WebSite acting as Blog Editor, etc.

.6.5.2.9 Party Role Type ID To

When the Communication was transmitted, what was the Role Type of the recipients at the time? Were they

Customers, Employees, Supervisors, Blog Users, what?

.6.5.2.10 {uiLabelMap.ServicemgmtCustRequestId}

{uiLabelMap.ServicemgmtCustRequestId} is not yet defined.

.6.5.2.11 PartyCommEventSubject

The Subject of this Communication to the Party.

.6.5.2.12 Start Date

Either the date of origin for this Communication, or the beginning of a period of time during which something is effective, such as a Promotion Start Date.

.6.5.2.13 Finish Date / Time

When does this Event end, conclude, become invalid or expire?

.6.5.3 Create new or Edit Comm Event

.6.5.3.1 EditContactListCommEvent



Marketing Manager Application

[Contact List](#) | [Parties](#) | [Comm Events](#)

Edit Contact List

[Create New Contact List Comm Event](#)

Communication Event Id

Communication Event Type Id

Party From

Party To

Status

PartyRoleTypeIdFrom

PartyRoleTypeIdTo

From Contact Mech

ContactListId

Start Date

Finish Date/Time

Subject

Note

Content

Cancel



Edit or create a new Contact List Comm Event from this screen.

.6.5.3.2 link buttons

[Create New Contact List Comm Event] [Save] [Cancel / Done] [Contact List] [Parties] [Comm Events]

.6.5.3.3 Communication Event ID

This assigned ID does not appear when creating, only after it is generated when the new Event is saved. You cannot change this ID, and you cannot bring up another by entering that number here.

.6.5.3.4 Communication Event Type ID (drop-down box)

What is the venue or format? Mail? Email? Phone? Select from the drop-down box.

.6.5.3.5 Party From (popup search tool)

Who (which Party) originated or sponsored this Communication? Either enter the Party ID accurately or select from the popup search tool.

.6.5.3.6 Party To (popup search tool)

Who (which Party) is the target recipient(s) of this Communication? Either enter the Party ID accurately or select from the popup search tool.

.6.5.3.7 Status (drop-down box)

Where is this Comm Event in the sequence of steps? When creating a new Event, you would probably use Entered or Pending. When Editing an Event later on, status might include: <P> Entered
 Pending
 Read
 In Progress
 Complete
 Resolved
 Referred
 Cancelled

.6.5.3.8 Party Role Type ID From

When the Party originated the Comm Event, what was their Role Type at the time? Was it Marketing acting as a Department, the person in charge of the WebSite acting as Blog Editor, etc.

.6.5.3.9 Party Role Type ID To (drop-down box)

When the Communication was transmitted, what was anticipated Role Type of the recipients at the time? Were they addressed as Customers, Employees, Supervisors, Blog Users, what?

.6.5.3.10 Contact List ID (popup search tool)

If this has not populated automatically, and if you do not know what the List ID is, use the popup search tool to identify it.

.6.5.3.11 Start Date (popup calendar)

Either the date of origin for this Communication, or the beginning of a period of time during which something is effective, such as a Promotion Start Date.

.6.5.3.12 Finish Date / Time (popup calendar)

When does this Event end, conclude, become invalid or expire?

.6.5.3.13 Subject

The Subject of this Communication to the Party. What is given in the Subject line of an Email message, for example.

.6.5.3.14 Note

Information recorded for the originator and others but not intended for the recipients.

.6.5.3.15 Content

What you want to say in the Communication.

.7 Reports

.7.1 MarketingReport

id:[14041] image:

The screenshot displays the 'Marketing Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing (selected), Order, Party, Shark, WebTools, and WorkEffort. A blue header bar contains 'Marketing Manager Application' and a sub-menu with 'Main', 'Data Source', 'Marketing Campaign', 'Tracking', 'Segment', 'Contact List', 'Reports', and 'Logout'. The main content area is titled 'Market Reports' and contains two sections: 'Tracking Code Report' and 'Marketing Campaign Report'. Each section has input fields for 'From Date (Date >=)', 'Thru Date (Date <)', and a dropdown for 'Tracking Code' or 'Marketing Campaign'. Below each section is a 'Run' button. The interface also features a language dropdown set to 'English (United States)' and a 'Set' button. At the bottom, there are logos for W3C, CSS, and XHTML 1.0, along with a copyright notice for 2001-2006 The Open For Business Project.

WELCOME THE ADMINISTRATOR!
2006-01-12 08:40:48.546

English (United States) Set

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Market Reports

Tracking Code Report

From Date (Date >=)

Thru Date (Date <)

Tracking Code - Any -

Run TrackingCode Report

Marketing Campaign Report

From Date (Date >=)

Thru Date (Date <)

Marketing Campaign - Any -

Run Marketing Campaign Report

W3C CSS W3C XHTML 1.0

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Set the criteria, then run either a Tracking Report or a Marketing Campaign Report from here.

.7.2 link buttons

[Run TrackingCode Report] [Run Marketing Campaign Report]

.7.3 Tracking Code Report

.7.3.1 From Date (>=) (popup calendar)

Select the period of time to be covered in the report by specifying the earliest date you wish to have reported. All the activity following that date will be reported.

.7.3.2 Thru Date (<=) (popup calendar)

If you wish the period of reporting to be other than thru the present moment, specify a cut-off point with the popup calendar.

.7.3.3 Tracking Code (drop-down box)

All existing Tracking Codes that could be reported are listed in the drop-down screen. If you wish the Report to focus on one particular Code, select it here. Else, all Tracking Codes will be reported if no date is specified.

.7.3.4 Results of the run

.7.3.4.1 TrackingCodeReport

id:[14049] image:



Welcome THE ADMINISTRATOR!
2006-01-12 09:14:49.796

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Marketing Manager Application

Main Data Source Marketing Campaign Tracking Segment Contact List Reports Logout

Tracking Code Report From Thru

Tracking Code	Visits	Orders	Amount of Orders	Conversion Rate
First-time buyers at site [1234]	0	0	0	0
PPC Campaign 1 [9000]	0	0	0	0
PPC Campaign 2 [9001]	0	0	0	0
PPC Campaign 3 [9002]	0	0	0	0
Affiliate 1 [9010]	0	0	0	0
Affiliate 2 [9011]	0	0	0	0
Affiliate 3 [9012]	0	0	0	0



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To see all activity for all Tracking Codes, give no dates and select "Any" for the Code.

.7.4 Marketing Code Report

.7.4.1 From Date (>=) (popup calendar)

Select the period of time to be covered in the report by specifying the earliest date you wish to have reported. All the activity following that date will be reported.

.7.4.2 Thru Date (>=) (popup calendar)

If you wish the period of reporting to be other than thru the present moment, specify a cut-off point with the popup calendar.

.7.4.3 Marketing Campaign

All existing Marketing Campaigns that could be reported are listed in the drop-down screen. If you wish the Report to focus on one particular Campaign, select it here. Else, all Marketing Campaigns will be reported, but only if no dates are specified.

.7.4.4 Results of the run

.7.4.4.1 MarketingCampaignReport



Welcome THE ADMINISTRATOR!
2006-01-12 09:30:35.062

English (United States)

[Accounting](#) [Catalog](#) [Content](#) [Example](#) [Facility](#) [Manufacturing](#) [Marketing](#) [Order](#) [Party](#) [Shark](#) [WebTools](#) [WorkEffort](#)

Marketing Manager Application

[Main](#) [Data Source](#) [Marketing Campaign](#) [Tracking](#) [Segment](#) [Contact List](#) [Reports](#) [Logout](#)

Marketing Campaign Report From Thru

Campaign Name	Visits	Orders	Amount of Orders	Conversion Rate
eCommerce Site Internal Campaign [9000]	0	0	0	0
Pay Per Click Advertising [9001]	0	0	0	0
Affiliate Sites [9002]	0	0	0	0



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To see all activity for all Marketing Campaigns, give no dates and select "Any" from the drop-down box.