Oracle® Retail Customer Engagement Cloud Service (Relate)

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CHAPTER 1

Introduction



The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

Overview

MICROS Relate™ is a comprehensive, web-based, direct-marketing application designed for today's fast-paced retail environment.

Because Relate is a web-based application that runs through web browsers, it uses conventions familiar to both traditional desktop applications and web-based applications.

About This Guide

This document provides you with detailed instructions for using Relate through its web interface. This interface is accessed through a web browser connecting to the Relate server over a network.

Conventions

The following conventions are used throughout this document to denote information for special emphasis or to bring your attention to an important point.



Information that can improve your understanding, simplify a task, or point out special circumstances.



Information that is important for the user to be aware of, such as information that can help ensure procedures are completed properly, or prevent the loss of, corruption of, or recording of incorrect data.



Information that is related to the task at hand, but not required to perform the task. This would include best practices or practical information that would help the user in the performance of the task.

[REQUIRED] - This marks a field on a form that ***must*** be completed. You will not be allowed to continue until the field is completed.

[OPTIONAL] - This marks a field or step that is not required and you may complete at your discretion.

[DEFAULT] - This marks the system default option for a particular field. You have the choice of accepting the default by doing nothing or selecting another option for the field.

Login

User must have a login name and password to access Relate. Use the following procedure to log into the Relate application:

> *Relate will reject access after 10 failed attempts.*

1. Use a web browser to navigate to the URL provided at the time of installation (similar to: http://<hostname>:<port_number>/relateui/<ORG_ID>/relate.html).

   The Relate login page is displayed.

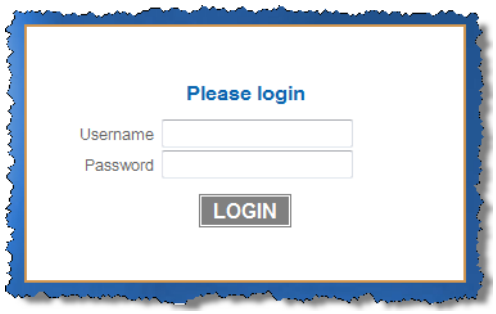


Figure 1-1: Relate Login

2. Enter your username in the **Username** field.
3. Enter your password in the **Password** field.

> *Your password cannot be viewed by anyone, including yourself; therefore, if you forget your password, you must have an administrator log in and enter a new password for you.*

4. Click the **Login** button, or press the [Enter] key.

   If the username and password are correct, the Relate main page opens.

Logout

To log out of Relate:

1. Click your username in the upper-right corner of the screen.

   A menu of user options opens.

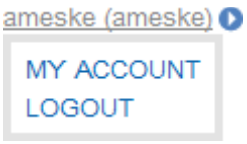


Figure 1-2: User Options Menu

2. Click **LOGOUT**.

   You are logged out of Relate and the interface returns to the Relate Login page.

My Account

In Relate, you can view information about your account, and make changes to some of your account settings.

To view your account information:

1. Click your username in the upper-right corner of the screen.

   A menu of user options opens.

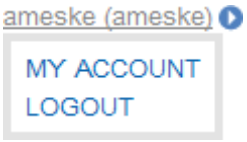


Figure 1-3: User Options Menu

2. Click **MY ACCOUNT**.

The My Account page opens, displaying information about your account.

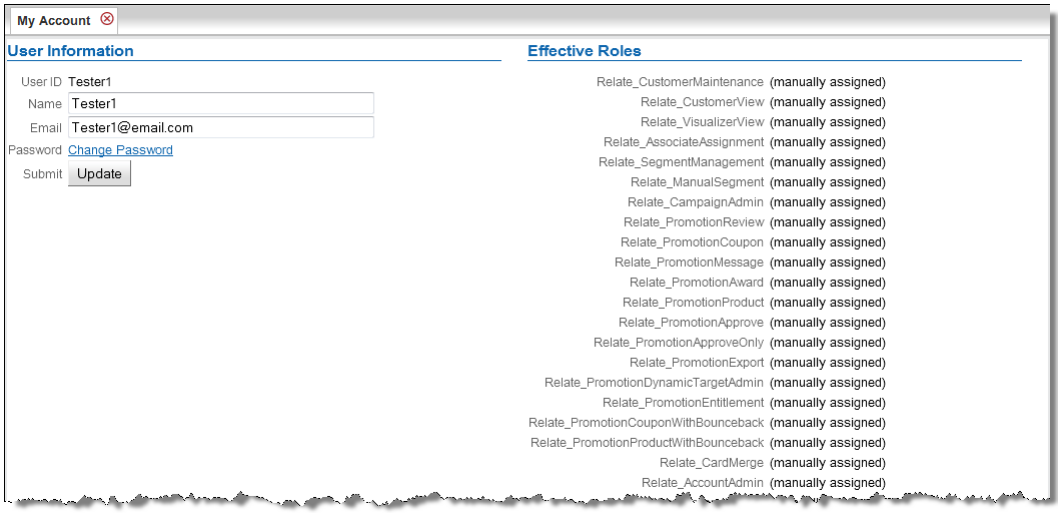


Figure 1-4: My Account Page

This page displays the following:

- **User ID** - Unique ID for your user account.
- **Name** - Name associated with your account.
- **E-mail** - Email address associated with your account.
- **Password** - Provides the ability to change your password.
- **Effective Roles** - Displays all of the Roles currently assigned to your user account.

Your assigned roles cannot be changed through the My Account page. For more information about assigning Roles, see the Relate Configuration Guide.

Change Name

To change the name associated with your account:

This procedure does not change the login name used by the Login procedure. The name is only a display name for the account.

1. In the **Name** Text Field, replace the current value with the new Name.
2. Click **Update**.

   The new Name is saved and displayed in the upper-right corner of the screen.



Figure 1-5: Updated Name

Change E-mail

To change the e-mail address associated with your account:

1. In the **E-mail** Text Field, replace the current value with the new e-mail address.
2. Click **Update**.

   The e-mail address for your account is changed to the entered address. All messages sent from the system will be sent to the new address.

Change Password

To change the password for your account:

1. Click the **Change Password** Link.

   A Change Password Window opens.

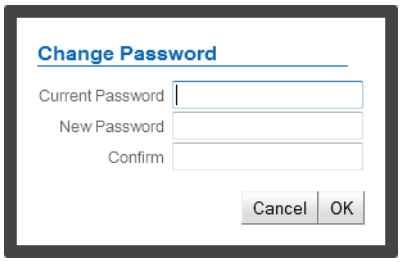


Figure 1-6: Change Password Window

2. In the **Current Password** Text Field, enter your current password.
3. In the **New Password** Text Field, enter the new password. The new password must follow the rules described in "Password Rules" on page 30.
4. In the **Confirm** Text Field, enter the new password again.
5. Click **OK** to confirm the change.

   If the entered information is correct, the Change Password Window closes, and you are returned to the My Account page. At the next Login, you will need to enter the new password to log into the system.

Password Rules

Passwords must follow certain security rules:

- Must consist of at least 7 characters.
- Must include at least 3 different character types: lower-case letters, upper-case letters, numbers, special characters (!, @, #, $, %, etc.).
- Cannot be the Username or User ID.
- Cannot reuse any of the six previously-used passwords.
- All passwords must be reset at least once every 90 days.
- All accounts unused for 90 days will auto-disabled.

User Interface

All User actions in Relate are performed through the user interface. This interface is accessed and used in a web browser.

Accessing Pages

To access the various functions of Relate, you must open the proper page(s). While many pages can be accessed through both a Menu and the Main Page, some pages can only be accessed through a Menu.

Many pages can also be accessed by clicking a link in another page. These links are described in the sections dedicated to the screens and windows where the links can be found.

Menu

You can use the menu at the top of the Relate screen to access most of the pages in Relate. This menu is available from every page in Relate, allowing instant access to most of Relate's functionality.

To access a page through the Relate menu, open the proper menu, then select the page within that menu. In this manual, this is described in the following way:

<Menu>-><Menu Item>

where **<Menu>** is the name of the menu and **<Menu Item>** is the item in the menu to select.

For example, to open the Customer Lookup/Edit page, use the **Customer->Customer Lookup/Edit** option. To select this option, click **Customer** in the Menu bar, then click **Customer Lookup/Edit** in the Customer Menu.

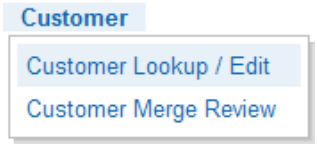


Figure 1-7: Customer Lookup/Edit Menu Option

Main Page

Some pages can also be accessed through the Relate Main Page, though many of them can only be accessed through the Relate Menu (e.g. pages in the Analytics and System Menus).

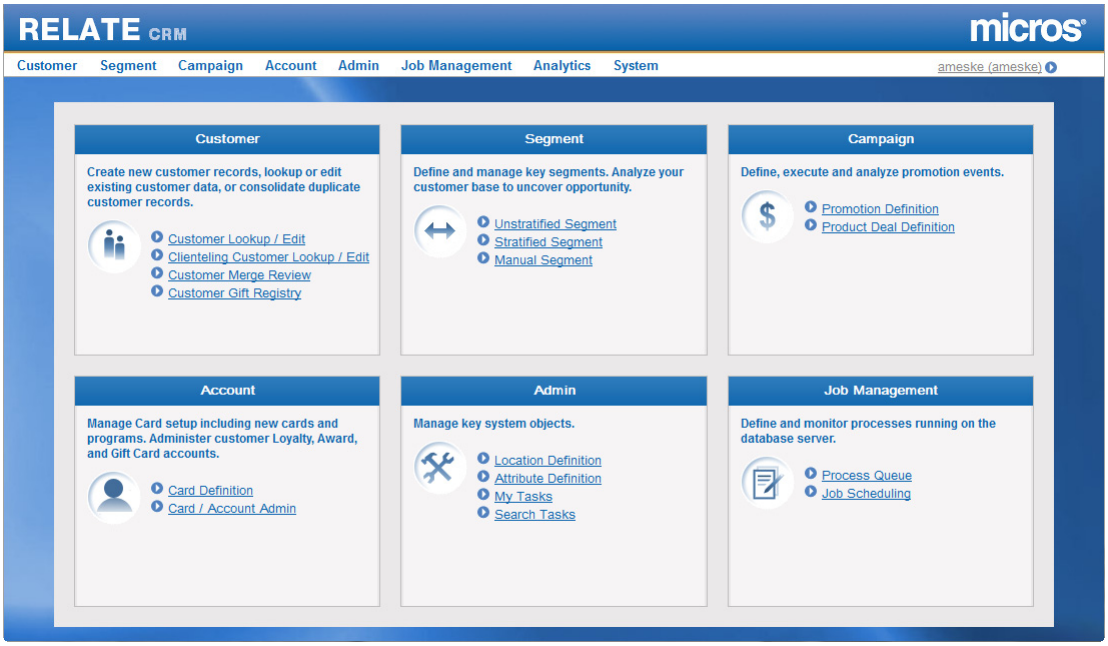


Figure 1-8: Main Page

The Relate Main Page displays separate sections containing links to Relate pages. The Main Page does not link to every page in Relate. However, the Main Page can be used to access many of the most commonly-used pages.

Link

A Link is an HTML hypertext link that can be used to open another page or menu in Relate. Link text will usually be a blue color to differentiate them from normal text, and they will frequently (but not necessarily) be underlined.

2 Click here next New Set Import Existing Deal Import Csv

Figure 1-9: Links

Tabs

When opening Pages within the Relate application, the pages are organized into Tabs at the top of the screen.

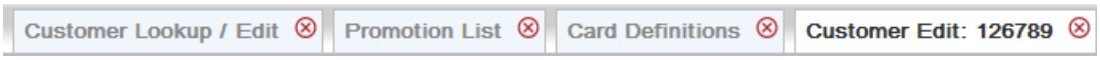


Figure 1-10: Tabs

- To switch to a different page within Relate, click on the Tab for that page.
- To close a page in Relate, click the Red **X** ( ) at the top right of the Tab.
- If there are so many Tabs open that they are being pushed off the screen, click the **more** Link (more) in the top-right corner of the page to open a list of currently open Tabs.

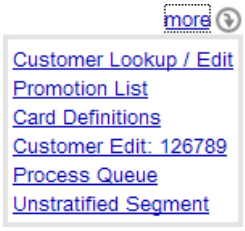


Figure 1-11: Tab List

In the list of open Tabs, click a Tab name to select and display that Tab.

Data Elements

When entering information into Relate, there are several standard types of entry fields used to provide information to Relate or display retrieved information.

Text Field

Information is entered into a Text Field by typing the information into the field. There are no limits on the information that can be entered into a Text Field, unless they are set for a specific instance of a text entry field.



Figure 1-12: Text Fields

Searches

When using a Text Field in a search, Relate searches for data that matches the entered information. If the Text Field is blank, the field will be ignored by Relate.

- If there is no Matching Rule Menu, Relate will only return data that matches the field text exactly.
- If there is a Matching Rule Menu, Relate will match the field text by the selected matching rule.

Text Area Field

Similar to a Text Field, information is entered into a Text Area Field by typing the information into the field. Unlike a Text Field, a Text Area Field allows carriage returns and multiple lines of information, rather than a single line of text. There are no limits on the information that can be entered into a Text Area Field, unless they are set for a specific instance of the field.

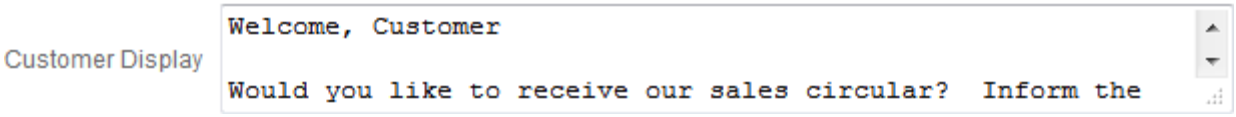


Figure 1-13: Text Area Field

Selection Menu

A Selection Menu is a drop-down menu with a limited number of possible options.

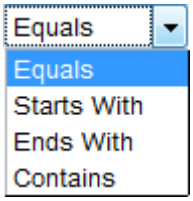
To use a Selection Menu, click the menu to open a drop-down menu that displays a list of possible choices, then click an item in the list to select it.



Figure 1-14: Selection Menus

Matching Rule Menu

In Relate, a Text Field can be associated with a Selection Menu that is used as a Matching Rule Menu. These Matching Rule Menus determine the rules that Relate uses when comparing the information in a text field with the data in the system.



Relate provides the following matching rules:

- **Equals** - The data must match the information in the Text Field exactly.
- **Starts With** - The data must begin with the information in the Text Field.
- **Ends With** - The data must end with the information in the Text Field.
- **Contains** - The data can have the information in the Text Field anywhere within it.

If the associated text field is blank, the Matching Rule Menu will be ignored by Relate.

Numeric Comparison Menu

In Relate, a Text Field can be associated with a Selection Menu that is used as a Comparison Menu, to compare numeric values in the Text Field with numeric values in the system. Whereas a Matching Rule Menu sets rules for matching text, a Numeric Comparison Menu sets rules for comparing relative values of numbers.



Relate provides the following numeric comparison rules:

- **>=** - The value must be greater than or equal to the value in the Text Field.
- **>** - The value must be greater than the value in the Text Field.
- **<=** - The value must be less than or equal to the value in the Text Field.
- **<** - The value must be less than the value in the Text Field.

Time Menus

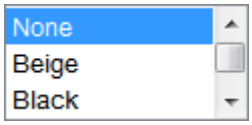
In Relate, time configurations can be performed through Time Menus. This is a set of Selection Menus that contain hour, minute, and AM/PM information.



To use Time Menus, select the hour of the time in the first menu, the minute of the time in the second menu and select either AM or PM in the third menu.

Multi-Select Menu

In Relate, a Multi-Select Menu is a Selection Menu that allow users to select one or multiple options in the menu.



To select one option in a Multi-Select Menu, click that option; any other option(s) that are currently selected are unselected.

To select multiple options in a Multi-Select Menu, hold the [CTRL] button while clicking each option; all of the selected menu options are selected.

Check Box

A Check Box is used to configure true/false or yes/no values.



Figure 1-15: Check Boxes

- When a Check Box has a check mark (☑) in it, the value is set to **true** or **yes**.
- When a Check Box is unchecked (☐), the value is set to **false** or **no**.

Radio Buttons

Radio Buttons define sets of mutually exclusive options in which only one option can be selected.



Figure 1-16: Radio Buttons

- When a Radio Button has been selected (◉), that option has been chosen.
- If another option is chosen in the set of Radio Buttons, the new option will be selected and the previously selected option will be unselected (○).

Calendar Menu

When a date must be entered in a search field, Relate provides a Calendar Menu that is used to select dates.

To use a calendar search field:

1. Click in the field.

The Calendar Menu opens.

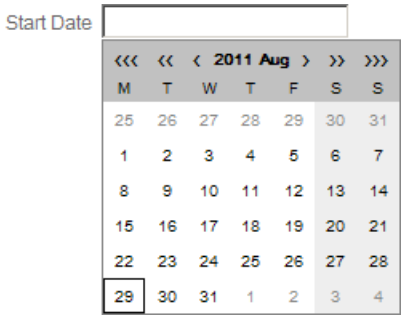


Figure 1-17: Calendar Menu

2. To display a different month for date selection in the calendar, use the navigation buttons along the top of the calendar:

- Click **<** to move the calendar back one month.
- Click **>** to move the calendar forward one month.
- Click **<<** to move the calendar back one year.
- Click **>>** to move the calendar forward one year.
- Click **<<<** to move the calendar back 10 years.
- Click **>>>** to move the calendar forward 10 years.

3. Click the proper date to select it.

The date is entered into the date field and the Calendar Menu closes.

Actions Menu

Many pages in Relate include an Actions Menu that contains a collection of commands that can be performed on that page. The commands will be specific to that page and will vary depending upon the page on which the menu appears.

The Actions Menu may have any number of names, depending upon the page on which it is located. For example, the name may be "More Actions" or "Customer Actions".

Open the Actions Menu by clicking on the page's Actions button. The menu will then open and display the options available on that page.

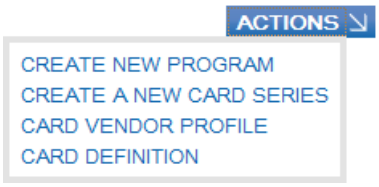


Figure 1-18: Actions Menu

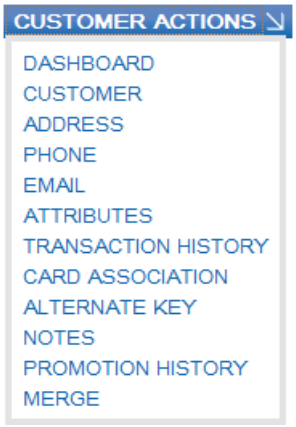


Figure 1-19: Customer Actions Menu



Figure 1-20: More Actions Menu

List

In Relate, many pages display its entities, such as Promotions or Customers, in a List. The interface provides methods for sorting and filtering these Lists.

PROMOTION ID	PROMOTION NAME	CAMPAIGN NAME	TYPE	START DATE	END DATE	GENERATED	STATUS	EXPORTED
317	MK Doc Test 1	MK Campaign	Product	2011 Aug 24	2013 Dec 31	N/A	Approved	Yes
316	Todd1	Todd1	Product	2011 Aug 6	2011 Aug 6	No	Saved	No
305	MK Test	MK Campaign	Product	2011 Jul 28	2013 Dec 31	N/A	Approved	Yes
302	MK 727 Promo	MK Campaign	Product	2011 Jul 27	2013 Dec 31	N/A	Approved	Yes
293	MK July 11 Promo	MK Campaign	Coupon	2011 Jul 27	2013 Dec 31	N/A	Approved	Yes
290	MK Test 2	MK Campaign	Coupon	2011 Jul 22	2013 Dec 31	N/A	Approved	Yes
289	MK Test	MK Campaign	Product	2011 Jul 21	2013 Dec 31	N/A	Approved	Yes
287	MK 718 Time Rule	MK Campaign	Coupon	2008 Oct 1	2013 Dec 31	N/A	Approved	Yes
283	MK 712 Promo	MK Campaign	Coupon	2008 Oct 1	2013 Dec 31	N/A	Approved	Yes

Figure 1-21: List

Filter

List pages in Relate commonly include one or more Filters that allow you to narrow a List of items to those meeting certain criteria. A Filter will take the form of a Selection Menu, Calendar Menu, or Text Field.

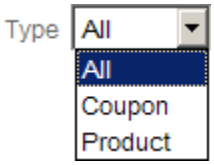


Figure 1-22: Selection Menu Filter

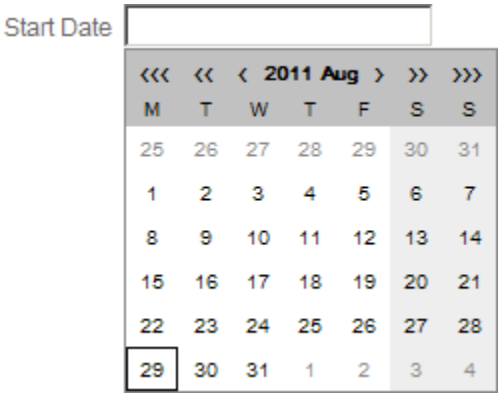


Figure 1-23: Calendar Menu Filter



Figure 1-24: Text Field Filter

After selecting an option in a Filter, the List will only display those List items that match the selected Filter criteria.

Sorting

The sort order for a List is selected by clicking on the name of the column that you are using to sort the List. The double arrow ( ) next to the column name will change to show the sort order.

- An up arrow ( ) indicates that the column is sorted in ascending order.
- A down arrow ( ) indicates that the column is sorted in descending order.



Some Lists in Relate may not have sorting arrows displayed. However, the Lists can still be sorted in ascending and descending order by clicking on the name of the column.

Page Navigation

A List is often limited to display only a certain number of records. If a user wants to view a record outside of the first set of records, that user will use the Page Navigation options.



Figure 1-25: Page Navigation

Page Navigation has the following elements:

-  **Record Numbers** - Indicates the range of records displayed on the current List page.
-  **Page Movement** - Indicates the current List page, the number of List pages, and provides buttons to navigate through the pages:
  - ▶ - Move to the next List page.
  - ◀ - Move to the previous List page.
  - ▶▶ - Move forward several List pages.
  - ◀◀ - Move backward several List pages.
  - ▶| - Move to the last List page.
  - |◀ - Move to the first List page.
-  **Go To Page** - Used to select a specific List page.

  To use this element, enter the number of the List page in the Text Field, then click the **GO** button.
-  **Page Size** - Used to select the number of records on each List page.

  Select the number of records in the Selection Menu to change the number of records in each List page. Note that this will change the number of List pages.

Layer List

Layer Lists organize data into navigable layers of information. By clicking on an item in a Layer List, a child page is opened, displaying information for the related item. This child page can then contain more Layer Lists, which are navigated in the same way.

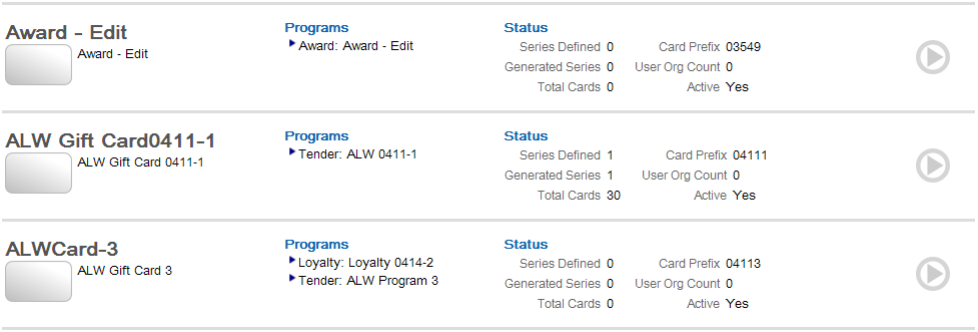


Figure 1-26: Layer List

Layer List Hierarchy

While moving through Layer Lists, Relate displays the hierarchy navigated to open the current page. During navigation through the Layer Lists, each child layer is added to the List to the right of the parent layer with an arrow pointing to the child layer (▸).



Figure 1-27: Layer List Hierarchy

To return to a page in the hierarchy, click the page name in the layer navigation display.

File Upload

When a file must be uploaded to the system, a File Upload field is displayed.



Figure 1-28: File Upload Field

To use a File Upload field:

1. Click the **Browse...** button.

   A Choose File to Upload window opens.

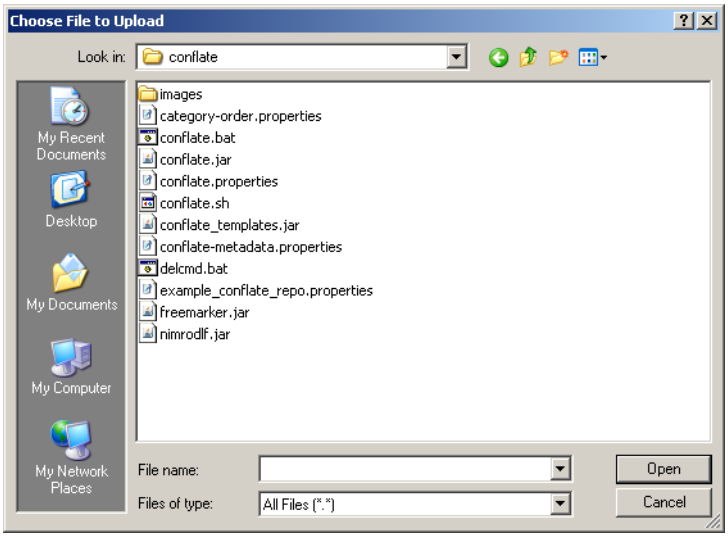


Figure 1-29: Choose File to Upload

2. Navigate to the directory in which the file is located.
3. Click the file to select it.
4. Click **Open**.

   The Choose File to Upload window closes and the filename is entered into the file upload field. The file will be uploaded by the system when the changes entered are submitted.

Window

In some areas of Relate, information may be accessed or edited through a pop-up Window within the Relate interface.

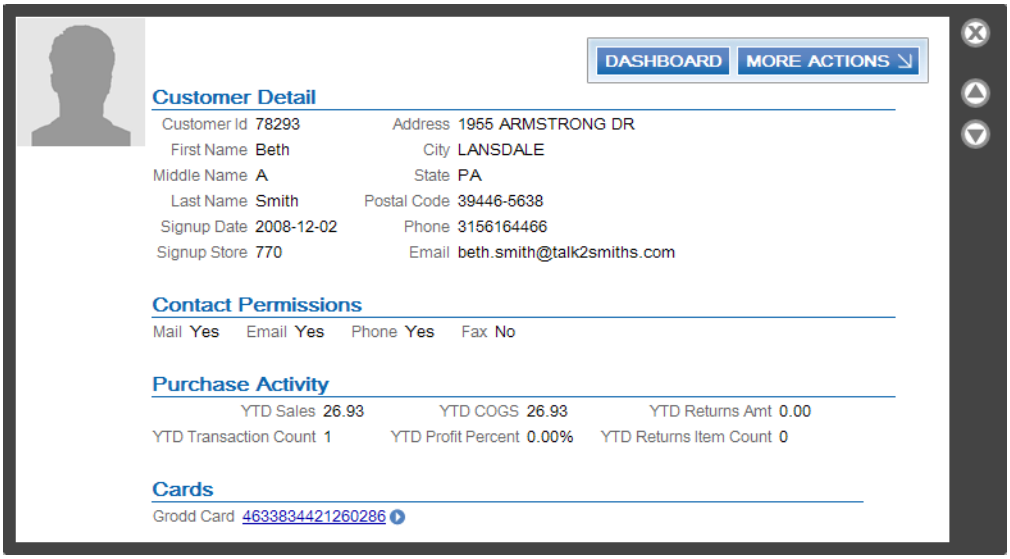


Figure 1-30: Window

> *The pop-up Window is displayed within Relate, and is not a browser pop-up window. Therefore, it will not be affected by pop-up blockers.*

To close a pop-up Window in Relate, do one of the following:

- Click the **X** ( ) in the upper-right corner of the Window.
- Click the Relate interface outside of the Window.

If the Window displays a record from within a List, the records in the List can sometimes be navigated by clicking the arrows in the Window.

- Click the up arrow ( ) to open the previous record in the List.
- Click the down arrow ( ) to open the next record in the List.

Search User Window

In some areas of Relate, searching for a User is performed through a Search User Window.

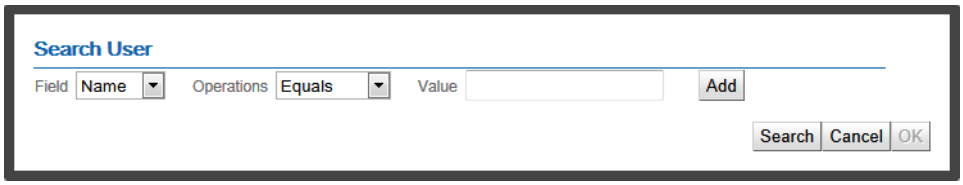


Figure 1-31: Search User Window

1. Use the **Field** Selection Menu to select the criteria on which to search.
2. Use the **Operations** Matching Rule Menu to select the matching rule.
3. Enter the **Value** to search for.
4. If necessary, add or delete search criteria:
   - ❑ To delete an unneeded set of search criteria fields click the **Delete** button for the search criteria.
   - ❑ To add another search criteria, click the **Add** button, then repeat steps 1-3 in the new search criteria fields.

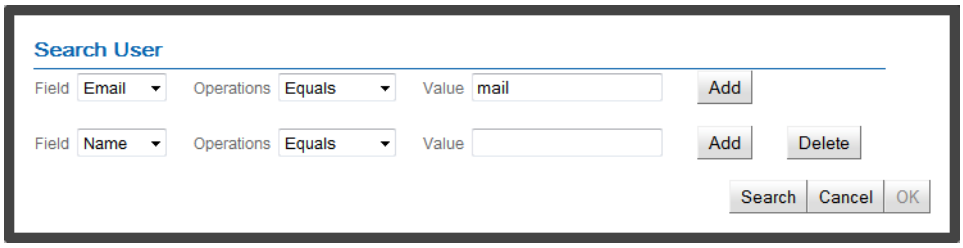


Figure 1-32: Search User - Added Criteria



- When two or more search criteria are included for one Field, the search results will include Customers that match ANY ONE of the entered criteria (a logical OR).
- When search criteria is included for different Fields, the search results will include Customers that match ALL of the entered criteria (a logical AND).

5. Click the **Search** button to perform the search.

The search results are displayed in a List.

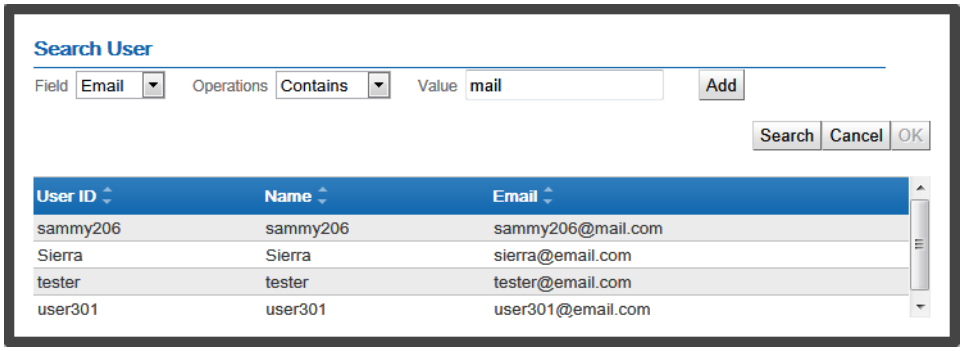


Figure 1-33: Search User - Search Results

Search Customer Window

In some areas of Relate, searching for a Customer is performed through a Search Customer Window.

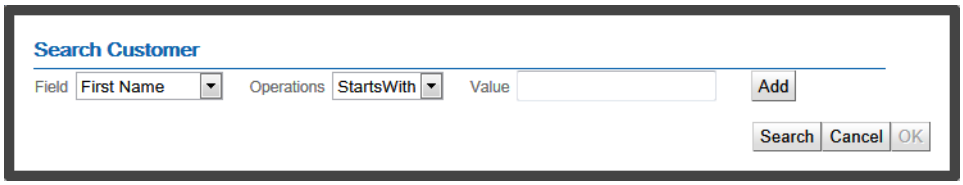


Figure 1-34: Search Customer Window

To use the Search Customer Window:

1. Select the **Field** to search. This Selection Menu has the following options:
   - ❑ **First Name** - Customer first name.
   - ❑ **Last Name** - Customer last name.
   - ❑ **Email** - Customer email address.
   - ❑ **Phone Number** - Customer phone number.
   - ❑ **Customer Id** - ID of the Customer.
   - ❑ **Alternate Key** - Alternate Key associated with the Customer.
2. Use the **Operations** menu to select the matching rule used in the search. This Matching Rule Menu has the following options:
   - ❑ **Starts With** - The data must begin with the information in the text field.
   - ❑ **Ends With** - The data must end with the information in the text field.
   - ❑ **Contains** - The data can have the information in the text field anywhere within it.
   - ❑ **Equals** - The data must match the information in the text field exactly.
3. Enter the **Value** to use in the search.
4. If necessary, add or delete search criteria:
   - ❑ To remove a set of search criteria, click the **Delete** button next to the line.

- To add another search criteria to the search, click the **Add** button, then repeat step 1-3 in the new search criteria fields.

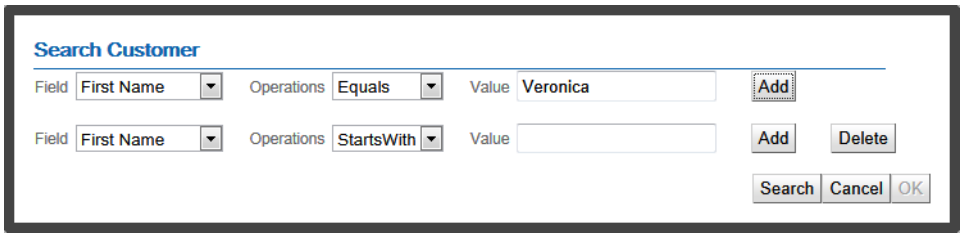


Figure 1-35: Search Customer - Added Criteria

- When two or more search criteria are included for one Field, the search results will include Customers that match ANY ONE of the entered criteria (a logical OR).
- When search criteria is included for different Fields, the search results will include Customers that match ALL of the entered criteria (a logical AND).

5. Click the **Search** button when the search criteria is complete.

A List of search results is displayed.

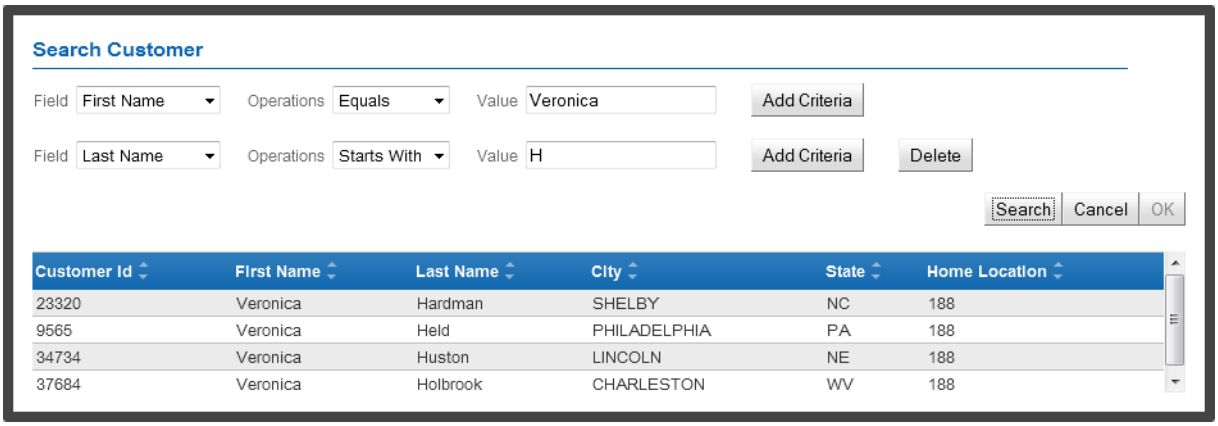


Figure 1-36: Customer Search Results

This List displays the following information:

- **Customer Id** - ID of the Customer.
- **First Name** - Customer first name.
- **Last Name** - Customer last name.
- **City** - Customer city.
- **State** - Customer state.
- **Home Location** - Home Location assigned to the Customer.

Wizard

Many of the elements within Relate are created and/or updated through a Wizard. These Wizards provide a step-by-step configuration process for all the fields that define an element in Relate.

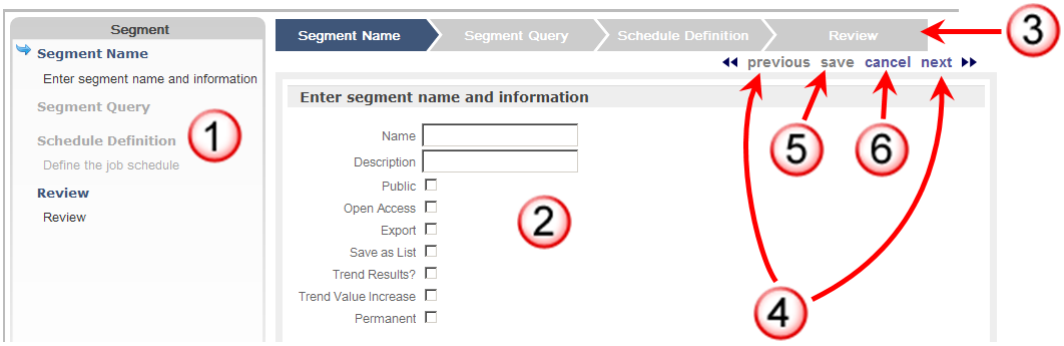


Figure 1-37: Sample Wizard

Table 1-1: *Sample Wizard Key*

Item	Description
1	**Wizard Navigation Panel** - Allows navigation to a specific step in the Wizard. See "Wizard Navigation" on page 46 for more information.
2	**Data Entry Panel** - Used for data entry and configuration fields.
3	**Progress Panel** - Lists the steps in the configuration process, and shows the current progress through that process.
4	**Navigation Links** - Moves to the next or previous step in the Wizard. See "Wizard Navigation" on page 46 for more information.
5	**Save Link** - Saves the current settings entered into the creation or update and closes the Wizard. See "Save Current Settings" on page 47 for more information.
6	**Cancel Link** - Cancels the creation or update and closes the Wizard without saving changes. See "Cancel Wizard" on page 47 for more information.

Wizard Navigation

To navigate through a Wizard, do one of the following:

- Use the **previous** and **next** buttons to navigate through the steps in the Wizard.
- Click a step name in the Wizard Navigation panel to navigate directly to that step.

When you have navigated to a step in the Wizard you can, if necessary, make changes to any enabled field in that step.

Data Validation

In the Wizard, data is validated whenever the user moves from one step to another.

- If the user clicks the **next** Link in a page with invalid information, the Wizard will not move to the next step while invalid data remains in the step.
- An error message or error icon ( ) is displayed for each validation error in a Wizard step.
- In the Wizard Navigation panel, an error icon ( ) is shown next to each step with one or more validation errors.

Save Current Settings

To save in a Wizard, click the **save** Link.

- When creating an element in a Wizard, the data cannot be saved until every step in the creation process has been performed, all required data entered, and Data Validation performed on all entered information.
- When performing updates in a Wizard, changes can be saved at any time.

Cancel Wizard

To close a Wizard while canceling all unsaved changes:

1. Click the **cancel** Link.

   A confirmation prompt opens.

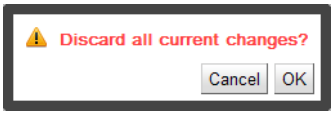


Figure 1-38: Confirmation Prompt

2. Click **OK** to exit the Wizard.
   - When creating an element in a Wizard, the data will not be saved and the element will not be created.
   - When editing an element in a Wizard, the element will keep its existing values.

Eligibility Rules

Relate uses Eligibility Rules to set limits on how and when Relate elements are applied and used. Relate has the following Eligibility Rule types:

- "Location Eligibility" on page 48 - These Eligibility Rules determine the Locations that will be eligible for a Relate element.
- "Segment/Target Eligibility" on page 51 - These Eligibility Rules define Segments and determine which Customers belong to those Segments.
- "Item Eligibility" on page 54 - These Eligibility Rules determine which items are eligible for a Relate element.
- "Time Eligibility" on page 64 - These Eligibility Rules determine the days, times, and date range in which a Relate element is valid.
- "Tender Eligibility" on page 67 - These Eligibility Rules determine the tenders that can be used in a Transaction for it to be eligible for some Relate element.

Location Eligibility

The Locations eligible for each Location Eligibility Rule are determined as follows:

- Locations must meet the inclusion and exclusion parameters of the Location Eligibility Rule:
  - If no Locations are configured in either Included Locations or Excluded Locations, all Locations are eligible.
  - If Locations are configured in the Included Locations and none are configured in the Excluded Locations, then only those Locations in the Included Locations are eligible.
  - If Locations are configured in both Included Locations and Excluded Locations, only those Locations that are in the Included Locations and not in the Excluded Locations are eligible.
  - If Locations are configured in the Excluded Locations and none are configured in the Included Locations, then all Locations except those in the Excluded Locations are eligible.
- For a Location to be an Included or Excluded Location, it must be part of a Group.

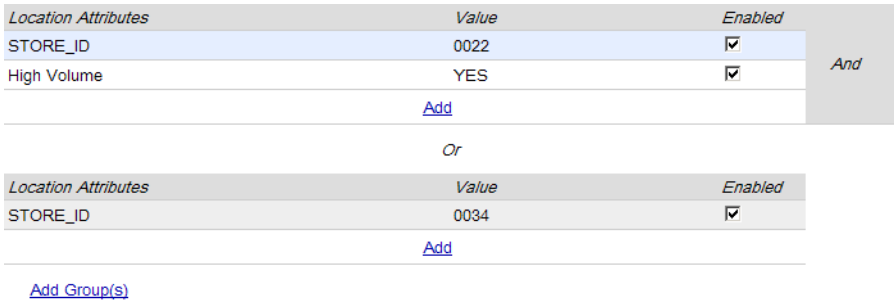


Figure 1-39: Location Groups

  - For a Location to be part of a Group, it must meet **all** the criteria of the Group.

- A Location that meets the criteria of any one Group within either the Included or Excluded Locations will be Included or Excluded.
- Each Group displays a List containing the following information:
  - **Location Attribute** - The name of the criteria.
  - **Value** - The criteria value that a Location must have to belong to the Group.
  - **Enabled** - Whether the attribute and value constraint is currently enabled. If the Check Box has a check mark, the constraint is active and a location must meet the criteria to belong to the Group.

Define Location Eligibility

Use the following procedures to define Location Eligibility for a Relate element:

- "Add Location Eligibility Rule" on page 49 to add a Location Eligibility Rule to an element.
- "Delete Location Eligibility Rule" on page 50 to delete an existing Location Eligibility Rule from an element.

Add Location Eligibility Rule

To add a Location Eligibility Rule:

1. Click the proper option to create a Location Eligibility Rule (see "Location Eligibility" on page 48 for a description of Inclusion, Exclusion, and Group rules):
   - If no Rule has been configured for the proper set of Groups, click the **Click Here** Link to add a Rule.
   - To add a Location to an existing Group, click the **Add Location to Group** Link.
   - To add a new Group, click the **Add Include Group** or **Add Exclude Group** Link.

   A Location Selection Window opens.



Figure 1-40: Location Selection Window

2. In the Filter Type Selection Menu, select the type of criteria to add to the Rule.
3. In the Search Criteria Text Field, enter the value to search for.
4. Click the **Search** button.

A List of search results is displayed.



Location Id	Name
2202	2202 new on 10.
44139	44139
AA11	asdfasdf
519	Beachwood
110	Carson City
100	Corporate Office
701	Crocker Park
188	Crystal Run

Figure 1-41: Location Results List

If no Locations match the search criteria, Relate will display the message "No results found."

5. Click a search result item to select it.



Press and hold the [CTRL] button to select multiple list items.

6. Click the **OK** button to add the Location(s) to the Rule, or click the **Cancel** button to discard the changes.

   The Location Selection Window closes and the selected row(s) are added to the Rule.

Delete Location Eligibility Rule

To delete a Location Eligibility Rule:

1. Click the Location Eligibility Rule.

   A menu opens displaying a list of options.

2. Click **Delete Attribute**.

   The rule is deleted.

Segment/Target Eligibility

The Segments eligible for each Segment Eligibility Rule are determined as follows:

- Segments or Strata must meet the inclusion and exclusion parameters of the Segment Eligibility Rule:
  - If no Segments or Strata are configured in either Included Segments or Excluded Segments, all Segments and Strata are eligible.
  - If Segments are configured in the Included Segments and none are configured in the Excluded Segments, then only those Segments and Strata in the Included Segments are eligible.
  - If Segments are configured in both Included Segments and Excluded Segments, only those Segments and Strata that are in the Included Segments and not in the Excluded Segments are eligible.
  - If Segments are configured in the Excluded Segments and none are configured in the Included Segments, then all Segments and Strata except those in the Excluded Segments are eligible.
- For a Segment or Strata to be an Included or Excluded Segment, it must be part of a Group.

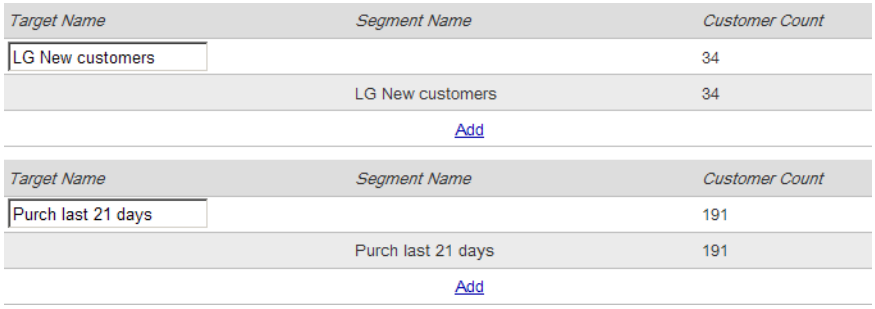


Figure 1-42: Target Groups

  - For a Segment or Strata to be part of a Group, it must be listed in a Group.
  - Each Group contains a List displaying the following information for each Segment or Strata in the Rule:
    - **Name** - Name of the Segment or Strata.
    - **Description** - Description of the Segment or Strata.
    - **Customer Count** - The number of Customers that are currently included in the Segment or Strata.
  - Each Group displays a Customer Count for the entire Group. This Count is the total number of unique Customers that are actually a part of the Group, not a simple total of the Customer Counts within the Group.
    - If a Customer is a member of two separate Strata or Segments in a Group, the Customer will only be counted as one Customer.
    - If a Customer is a member of a previously defined Group, the Customer will not be included as a member of the latter Group, lowering its count.

Define Segment Eligibility

Use the following procedures to define Segment Eligibility for a Relate element:

- "Add Segment Eligibility Rule" on page 52 to add a Segment Eligibility Rule to an element.
- "Delete Segment Eligibility Rule" on page 54 to delete an existing Segment Eligibility Rule from an element.

Add Segment Eligibility Rule

1. Click the **Add Rule** button, or the **Click Here** Link to add a Segment Eligibility rule.

   An Add Segment Eligibility Window opens.

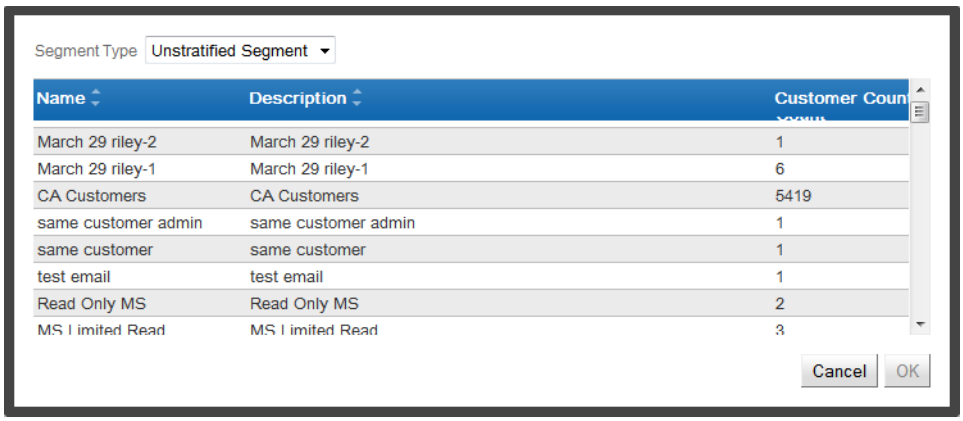


Figure 1-43: Segment Eligibility Window

2. Select the type of Segment to add:
   - **Unstratified Segment** - **[DEFAULT]** Add the Customers in an Unstratified Segment.

     A List of Unstratified Segments is displayed. Select the Segment(s) to include in the Eligibility Rule:

     1) Click a Segment to select it for inclusion.

     Hold the [CTRL] button to click and select multiple Segments.

     2) Continue with step 3.
   - **Stratified Segment** - Add the Customers in a Strata belonging to a Stratified Segment.

A List of Stratified Segments is displayed. Select the Strata(s) to include in the Eligibility Rule:

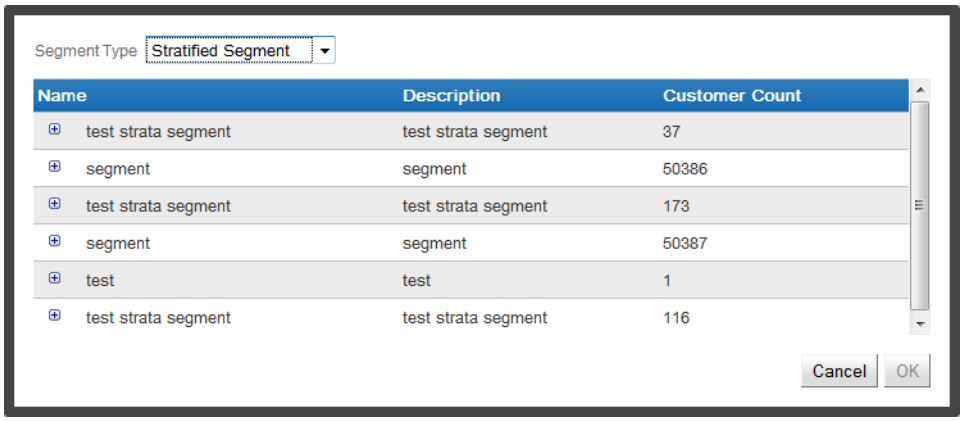


Figure 1-44: Stratified Segments

1) Click the expand (⊞) button for each Segment whose Strata(s) are being included in the Segment Eligibility rule.

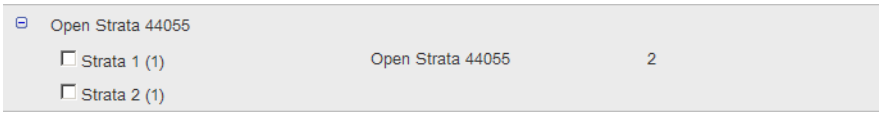


Figure 1-45: Open Stratified Segment

2) Click to enter a check mark (☑) in the Check Box for each Strata to include in the Segment Eligibility rule.

3) Continue with step 3.

- **Manual Segment** - Add the Customers in a Manual Segment.

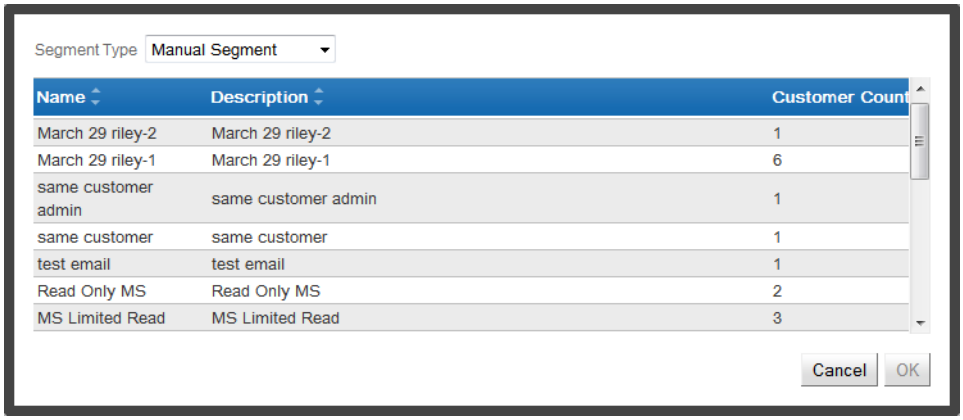


Figure 1-46: Manual Segments

A List of Manual Segments opens. Select the Segment(s) to include in the Eligibility Rule:

1) Click a Segment to select it for inclusion.

Hold the [CTRL] button to click and select multiple Segments.

2) Continue with step 3.

3. Click the **OK** button to add the selected Segments or Strata to the List and close the Window.

   Click **Cancel** to discard the changes and close the Window.

Delete Segment Eligibility Rule

1. Click the rule in the Segment Eligibility List.

   A menu opens displaying a List of options.

2. Click **Delete Rule**.

   The rule is deleted.

Item Eligibility

The Items eligible for each Item Eligibility Rule are determined as follows:

- Items must meet the inclusion and exclusion parameters of the Item Eligibility configuration:
  - If no Items are configured in either Included Items or Excluded Items, all Items are eligible.
  - If Items are configured in the Included Items and none are configured in the Excluded Items, then only those Items in the Included Items are eligible.
  - If Items are configured in both Included Items and Excluded Items, only those Items that are in the Included Items and not in the Excluded Items are eligible.
  - If Items are configured in the Excluded Items and none are configured in the Included Items, then all Items except those in the Excluded Items are eligible.
- Each List contains the following information:
  - **Filter** - The criteria used for the Item Eligibility Rule.
  - **Value** - The criteria value that an Item must have to belong to the Item Eligibility Rule.
  - **Description** - A description of the Item(s) belonging to the criteria value.

Define Item Eligibility

Use the following procedures to define Item Eligibility for a Relate element:

- "Add Item Eligibility Rule (Simple)" on page 55, "Add Item Eligibility Rule (Advanced)" on page 56, or "Add Item Eligibility Rule (Culinary)" on page 60to add an Item Eligibility Rule to a Relate element.
- "Delete Item Eligibility Rule" on page 62 to delete an existing Item Eligibility Rule from a Relate element.
- "Import Item Eligibility Rules" on page 62 to import a set of Items into the Item Eligibility Rule through a comma-separated values (CSV) file.
- "Import Existing Deal" on page 63 to import the Item Eligibility Rules from an existing Deal.

Add Item Eligibility Rule (Simple)

To add a simple Item Eligibility Rule to a Relate element:

1. Click the proper option to create an Item Eligibility Rule (see "Item Eligibility" on page 54 for a description of Inclusion and Exclusion rules):
   - ❑ If no Rule has been configured for the proper set of Groups, click the **Click Here** Link to add a Rule.
   - ❑ To add new criteria to an existing set of Included or Excluded Items, click the **Add** button for the appropriate list.

   An Item Hierarchy Search Window opens.

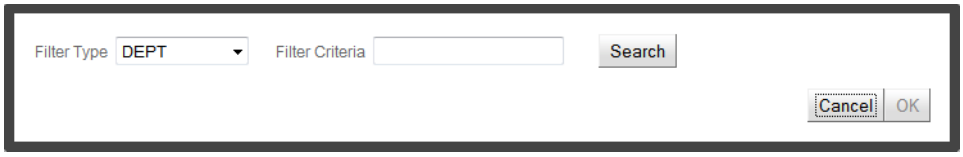


Figure 1-47: Item Selection Window (Simple)

2. In the **Item Filter** Selection Menu, select the type of Item Filter to add to the Rule.
3. In the Search Criteria Text Field, enter the value to search for in the Hierarchy Level.
4. Click the **Search** button.

   A List displays the items matching the entered Search Criteria.

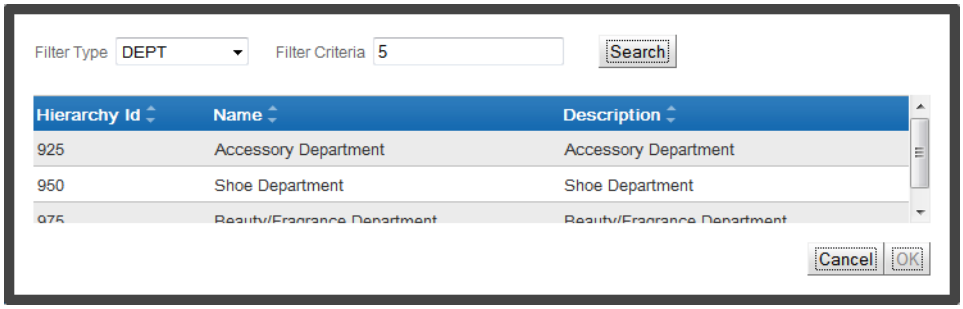


Figure 1-48: Item Selection Window - Search Results

5. Click an item in the search result List to select it.

> *Press and hold the [CTRL] button to click and select multiple items.*

6. Click the **OK** button to add the selected items to the Item Eligibility Rule and close the Item Selection Window.

   Click the **Cancel** button to close the Item Selection Window without adding items.

Determining Included Items

When creating an Item Eligibility Rule using the Simple method, Items will be included in the Rule according to the following rules:

- If Attribute values are configured, ALL Attribute values in the Rule must be matched.
- If any other non-Attribute condition is configured, at least one non-Attribute condition must be matched.

For example, if a rule were set up with the following criteria:

- Department = 24
- Department = 26
- Season = Fall
- Attribute Size = 8.5
- Attribute Width = EE

And the following Items were configured in the system:

Item A (Included)	Item B (Not Included)	Item C (Not Included)
■ Department = 24	■ Department = 24	■ Department = **70**
■ Season = **Spring**	■ Season = **Spring**	■ Season = **Spring**
■ Attribute Size = 8.5	■ Attribute Size = 8.5	■ Attribute Size = 8.5
■ Attribute Width = EE	■ Attribute Width = **C**	■ Attribute Width = EE

Item A would be included in the Item Eligibility Rule, because all the Attributes match, and the Department matches the Rule configuration, even though the Season does not.

Item B is not included because the Width attribute does not match.

Item C is not included because neither the Department nor Season match.

Add Item Eligibility Rule (Advanced)

To add an advanced Item Eligibility Rule to a Relate element:

1. Click the proper option to create an Item Eligibility Rule (see "Item Eligibility" on page 54 for a description of Inclusion and Exclusion rules):
   - ❑ If no Rule has been configured for the proper set of Groups, click the **Click Here** Link to add a Rule.
   - ❑ To add new criteria to an existing set of Included or Excluded Items, click the **Add** button for the appropriate list.

An Item Hierarchy Search Window opens.

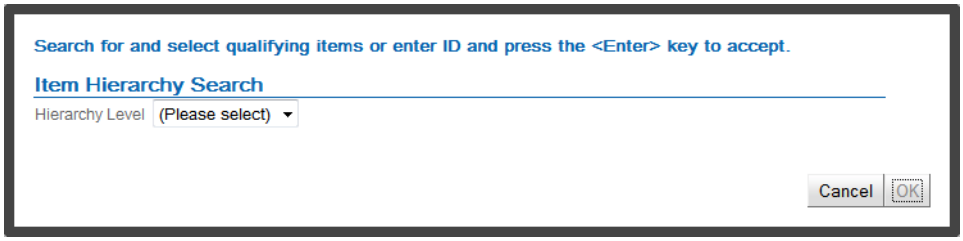


Figure 1-49: Item Selection Window

2. In the **Hierarchy Level** Selection Menu, select the type of Item Hierarchy Level to add to the Rule.
   - ❑ If you select **All Items**, a search area and Filter fields open.

     Continue with step 6.
   - ❑ If you select **Item ID**, Filter fields open.

     Continue with step 11.
   - ❑ For any other selected value, continue with the next step.
3. In the Search Criteria Text Field, enter the value to search for in the Hierarchy Level.

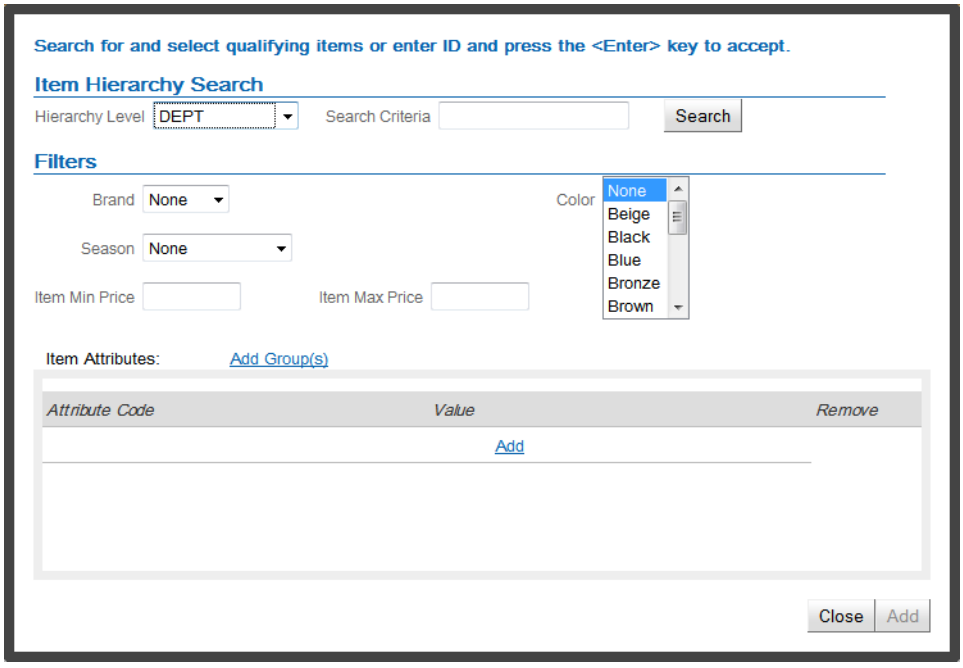


Figure 1-50: Item Selection Window - Hierarchy Level

4. Click the **Search** button or press the [Enter] key.
   - ❑ If the Search Criteria equals an ID for the Hierarchy Level, the ID is added to the Eligibility Rule. Return to step 2 to add more items to the rule.
   - ❑ If the Search Criteria does not equal an ID for the Hierarchy Level, a List displays the levels matching the entered Search Criteria. Continue with the next step.

5. Click an item in the search result List to select it.

> *Press and hold the [CTRL] button to click and select multiple items.*

6. Use the **Filters** fields to set additional rules on the eligible items.

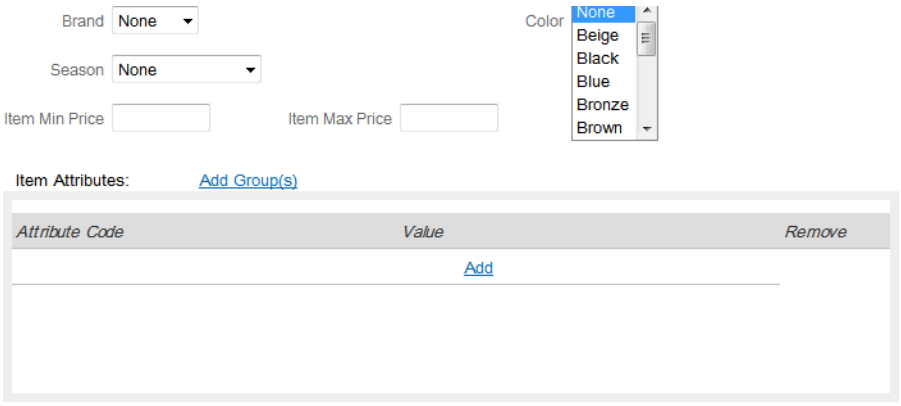


Figure 1-51: Item Hierarchy Search - Filters

- **Brand** - Use this Selection Menu to indicate whether the item should have a brand name attached to it. Select **None** **[DEFAULT]** to not filter by brand.
- **Season** - Use this Selection Menu to indicate the season of the item. Select **None** **[DEFAULT]** to not filter by season.
- **Color** - Use this Multi-Select Menu to indicate the color(s) of the item. Select **None** **[DEFAULT]** to not filter by color.
- **Item Min Price** - Use this Text Field to define the minimum price of the item. Leave blank **[DEFAULT]** to have no minimum item price.
- **Item Max Price** - Use this Text Field to define the maximum price of the item. Leave blank **[DEFAULT]** to have no maximum item price.

7. If necessary, define the Item Attribute filters for a Group (see "Item Attribute Filter Groups" on page 59 for a description of the rules used for Item Attribute Filters).

   a. Click the **Add** Link in an Item Attribute Group.

   A new Item Attribute filter is added to the Group.

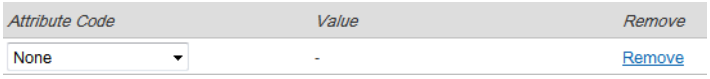


Figure 1-52: New Item Attribute Filter

   b. In the **Attribute Code** Selection Menu, select the Item Attribute to add.

c. In the **Value** field, select or enter the Attribute value to use for the filter.

> *The method used to enter the filter value will depend on the Attribute Type.*

d. If necessary, click the **Remove** Link to remove an Attribute from a Group.

e. If necessary, repeat steps a-c for each Attribute to include in the Group.

8. If necessary, click the **Add Group(s)** Link to add another Group, then repeat step 7 to add Attributes to the Group.

9. Click the **Add** button to add the selected Item(s) to the Rule.

10. Do one of the following:

- ❑ Return to step 2 to add more Item(s) to the Eligibility Rule.
- ❑ Click the **Cancel** button to close the Item Selection Window.

11. If you selected **Item ID** in the **Hierarchy Level** Selection Menu, enter the value to search for in the **Search Criteria** Text Field.

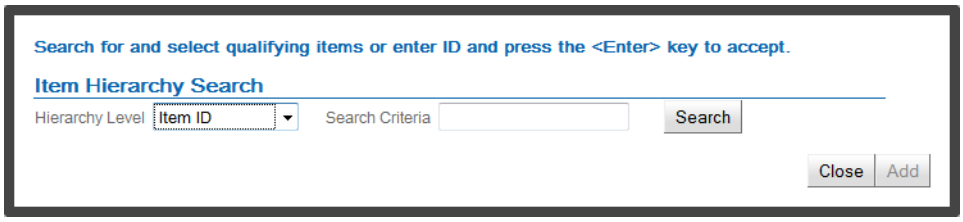


Figure 1-53: Item Hierarchy Search - Item ID

12. Click the **Search** button or press the [Enter] key.

- ❑ If the Search Criteria equals an Item ID, the Item is added to the Eligibility Rule. Return to step 2 to add more Items.
- ❑ If the Search Criteria does not equal an Item ID, a List displays the Items matching the entered Search Criteria. Click an Item in the search result List to select it.

> *Press and hold the [CTRL] button to click and select multiple items.*

13. Click the **Add** button to add the selected Item(s) to the Rule.

14. Do one of the following:

- ❑ Return to step 2 to add more Item(s) to the Eligibility Rule.
- ❑ Click the **Close** button to close the Item Selection Window.

Item Attribute Filter Groups

When using Item Attributes to filter the items that are included in the Eligibility Rule, Relate uses the following rules for determining eligibility:

- If no Attribute Filter Groups are included, Relate will not use Item Attributes as a filter.
- For an Item to be included in the rule, it must be included in at least one Group (i.e. there is a logical OR relationship between separate Groups).
- For an Item to be part of a Group, it must be assigned each Attribute Code and Attribute Value listed in the Group (i.e. there is a logical AND relationship between Attributes in a Group).
- Each Group contains a List displaying the following information for each Segment or Strata in the Rule:
  - **Attribute Code** - Name of the Attribute.
  - **Value** - Value of the Attribute.

Add Item Eligibility Rule (Culinary)

To add an Item Eligibility Rule for culinary items:

1. Click the proper option to create an Item Eligibility Rule (see "Item Eligibility" on page 54 for a description of Inclusion and Exclusion rules):
   - If no Rule has been configured for the proper set of Groups, click the **Click Here** Link to add a Rule.
   - To add new criteria to an existing set of Included or Excluded Items, click the **Add** button for the appropriate list.

   An Item Selection Window opens.

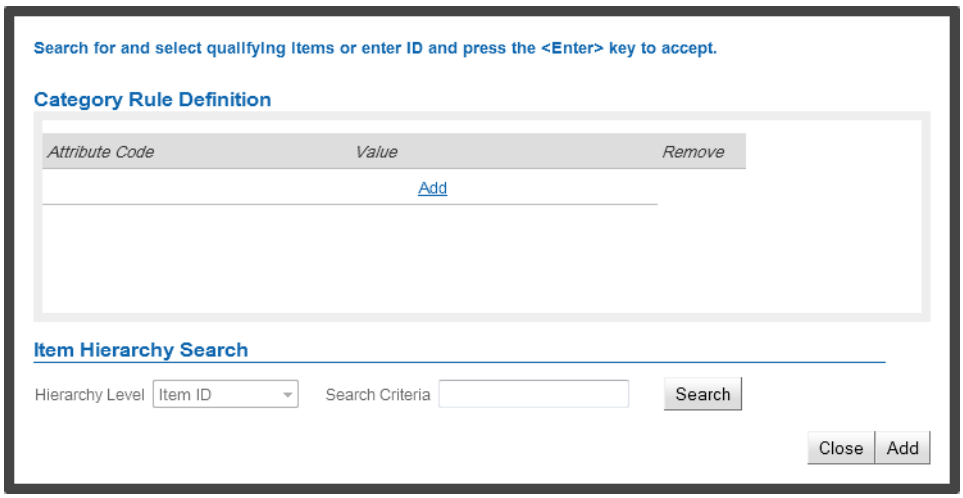


Figure 1-54: Item Selection Window

2. Culinary items can be added either by Item Hierarchy, or by Item ID search.
   - Add Items by Attribute:
     1) Click the **Add** Link in the Category Rule Definition area.
     2) An Attribute Code entry line opens.
     3) Select the Attribute Code for the Item in the Selection Menu.

4) The Value Selection Menu opens.

5) Select the Value for the Item Attribute in the Selection Menu.

6) If necessary, repeat steps 1-5 for each Item Attribute to add to the Item search.

7) If necessary, click the Remove Link for each Attribute to remove.

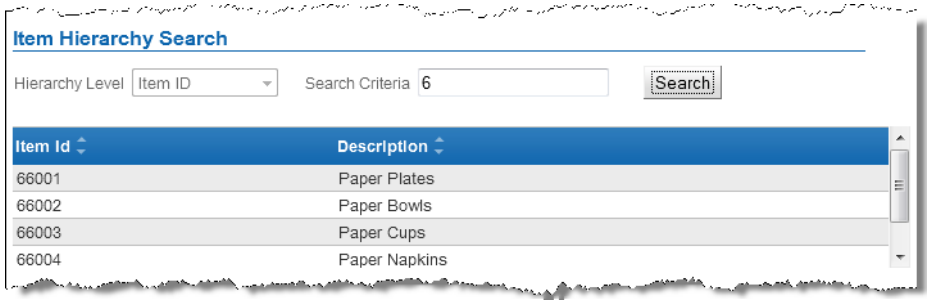
8) Continue with step 3 on page 61.

- ❑ Add Items by Item ID search:

1) In the Search Criteria Text Field, enter the value to search for in the Item ID.

2) Click the **Search** button.

A List displays the items matching the entered Search Criteria.



3) Click an item in the search result List to select it.

4) If necessary, repeat steps 1-3 for each Item to add to the Item search.



Press and hold the [CTRL] button to click and select multiple items.

5) Continue with step 3 (below).

3. Click the **Add** button to add the selected Item(s) to the Rule.

4. Repeat step 2 on page 60 to add additional Item(s) to the Rule.

5. When you are done adding Items, click the **Close** button to close the Item Selection Window.

Delete Item Eligibility Rule

To delete an Item Eligibility Rule:

1. Click the Item Eligibility Rule to select it.



Press and hold the [CTRL] button to click and select multiple items.

2. Click **Remove**.

   A confirmation prompt opens.

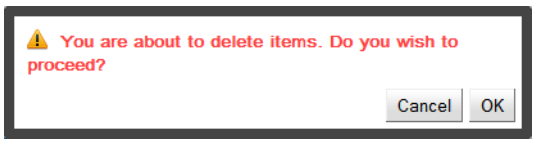


Figure 1-55: Delete Item Eligibility Rule Confirmation

3. Click the **OK** button to delete the Rule, or click the **Cancel** button to keep the Rule in place.

Delete All Item Eligibility Rules

To delete all Item Eligibility Rules from either the Included Items or Excluded Items List, click the **Remove All** Link for that List. All the Rules are removed.

Import Item Eligibility Rules

A set of Item Eligibility Rules can be imported into Relate using a comma-separated values (CSV) file. To import a set of Item Eligibility Rules:

1. Open the Import CSV Window by doing one of the following:
   - ❑ If there are items in the Item Eligibility Rule, click the **Import Csv** Link.
   - ❑ If no items have been added, click the **click here** Link for importing CSV files.

   The Import CSV Window opens.



Figure 1-56: Import CSV Window

2. Use the File Upload field to select the CSV file to import.
3. Click the **Import** button.
4. The Import CSV Window closes and the items are added as Item Eligibility Rules.

CSV File Format

When importing Items into an Item Eligibility Rule, the CSV file listing the items must have the following fields for each line:

- HIERARCHY LEVEL **[REQUIRED]**
  - If the Hierarchy Level is Item, use the value `_ITEM_ID_` for this field.
  - For a non-Item Hierarchy Level, use the value configured in Conflate.

> **See also:** The Relate Configuration Guide for information about Conflate and configuring the names of Hierarchy Levels.

- HIERARCHY VALUE **[REQUIRED]**
- BRAND **[OPTIONAL]**
- SEASON **[OPTIONAL]**
- COLOR **[OPTIONAL]**
- MIN PRICE **[OPTIONAL]**
- MAX PRICE **[OPTIONAL]**

Each line in the CSV file corresponds to one Hierarchy Level being imported.

A placeholder must be used for all fields. For example, to include an item with an ID of 343, from the Acme brand, colored brown, with a minimum price of 13.50, with no season, and with no maximum price, the following line would be included in the CSV file:

```
_ITEM_ID_,343,Acme,,brown,13.50,
```

Note the empty SEASON and MAX PRICE fields in the example.

Import Existing Deal

In some areas of Relate, the Item Eligibility Rules in an existing Deal can be imported as a whole. To import the Item Eligibility Rules from an existing Deal:

1. Click the **Import Existing Deal** Link.

   The Import Existing Deal Window opens.

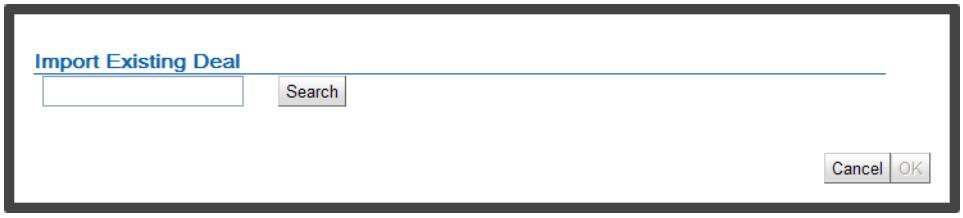


Figure 1-57: Import Existing Deal Window

2. Enter the search terms for the Deal in the Text Field.

> *Keep the Text Field empty to return all Deals.*

3. Click the **Search** button.

   A List of Deals matching the search criteria is displayed.

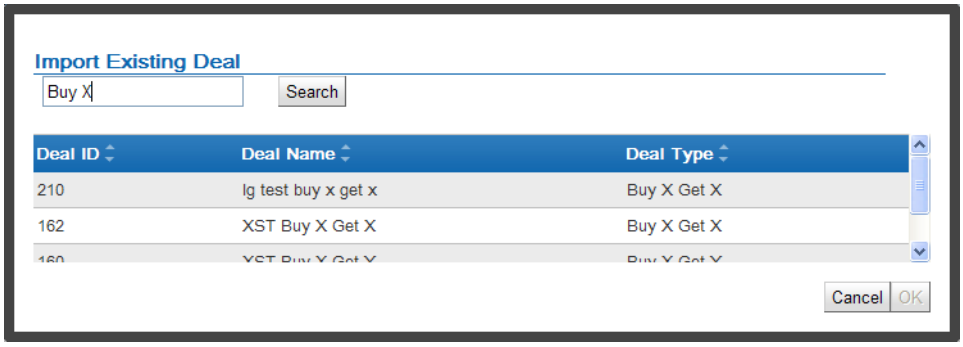


Figure 1-58: Search Results Returned

4. Click a Deal to select it. Press and hold the [CTRL] button to select multiple items.
5. Click the **OK** button to import the Item Eligibility Rules for the selected Deal(s) and close the Window, or click **Cancel** to close the Window without performing the import.

Time Eligibility

Time rules constrain Relate elements to certain days or times, or to certain time-related events (such as sign-up anniversaries or birthdays).

If one or more Time Rules are defined for a Relate element, the Time Rule List displays the following information for each Time Rule:

- **Name** - Name of the Time Rule.
- **Description** - Description of the Time Rule.
- **Type** - The type of Time Rule. This can be one of the following:
  - **Birthday Anniversary** - Rule that is active during the time around the Customer's birthday.
  - **Signup Anniversary** - Rule that is active during the time around the date when the Customer signed up for the Loyalty Program.
  - **Bonus Period** - Rule that causes the Relate element to be active during a defined period of time.
  - **Blackout Period** - Rule that prevents the Relate element from being active during a defined period of time.

Define Time Eligibility

The following procedures can be used to configure Time Eligibility Rules:

- "Add Time Eligibility Rule" on page 65 to add a Time Eligibility Rule to a Relate element.
- "Edit Time Eligibility Rule" on page 66 to edit an existing Time Eligibility Rule.
- "Delete Time Eligibility Rule" on page 67 to delete an existing Time Eligibility Rule.

Add Time Eligibility Rule

To add a Time Eligibility Rule to an element:

1. Click the **Add Rule** button, or the **Click Here** Link to add a Time Rule.

   A Time Rule Definition Window opens.

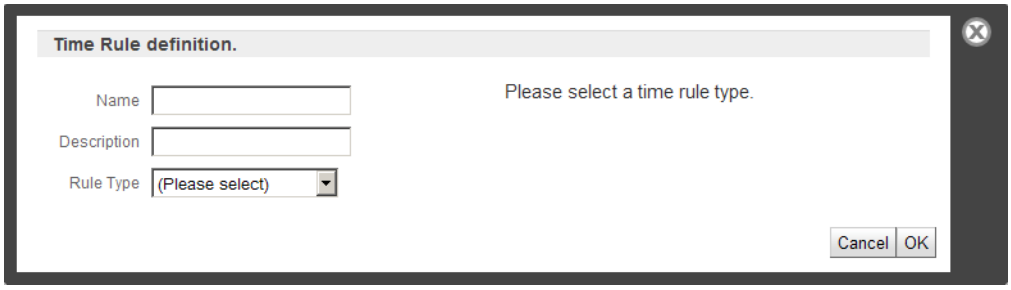


Figure 1-59: Time Rule Definition Window

2. Enter the name of the Time Rule in the **Name** field.
3. Enter a description of the Time Rule in the **Description** field.
4. In the **Rule Type** Selection Menu, select the type of Time Rule to add:
   - **Birthday Anniversary** - Rule that is active during the time around the Customer's birthday. Continue with step 6.
   - **Signup Anniversary** - Rule that is active during the time around the date when the Customer signed up for the Loyalty Program. Continue with step 6.
   - **Bonus Period** - Rule that causes the Relate element to be active during a defined period of time.
   - **Blackout Period** - Rule that prevents the Relate element from being active during a defined period of time.

5. If you selected **Bonus Period** or **Blackout Period** for the Rule Type, select the time for the Rule:

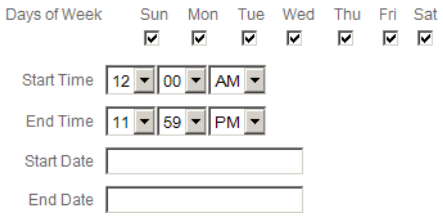


Figure 1-60: Time Configuration

   a. In the **Days of Week** Check Box set, select the days of the week on which the Time Rule will be effective.

   b. In the **Start Time** Time Menus, select the time of day at which the Time Rule will become effective.

   c. In the **End Time** Time Menus, select the last time of day at which the Time Rule will remain in effect.

   d. In the **Start Date** Calendar Menu, select the date on which the Time Rule will become effective.

   e. In the **End Date** Calendar Menu, select the last date on which the Time Rule will still be effective.

6. Click the **OK** button to add the selected Times to the List and close the Window, or click **Cancel** to discard the changes and close the Window.

Edit Time Eligibility Rule

To edit an existing Time Eligibility Rule:

1. In the Time Rule Definition List, click the Rule to edit.

   The Time Rule is opened in a Time Rule Definition Window.

2. Make the necessary changes to the current configuration:

   - **Name** - Name of the Time Rule.
   - **Description** - Description of the Time Rule.
   - **Rule Type** - The type of Time Rule:
     - **Birthday Anniversary** - Rule that is active during the time around the Customer's birthday.
     - **Signup Anniversary** - Rule that is active during the time around the date when the Customer signed up for the Loyalty Program.
     - **Bonus Period** - Rule that causes the Relate element to be active during a defined period of time.
     - **Blackout Period** - Rule that prevents the Relate element from being active during a defined period of time.
   - If the Rule Type is **Bonus Period** or **Blackout Period**, the following configurations are displayed:

- **Days of Week** - Days of the week on which the Time Rule will be effective.
- **Start Time** - Time of day at which the Time Rule will become effective.
- **End Time** - Last time of day at which the Time Rule will remain in effect.
- **Start Date** - Date on which the Time Rule will become effective.
- **End Date** - Last date on which the Time Rule will still be effective.

3. Click the **OK** button to add the selected Times to the List and close the Window, or click **Cancel** to discard the changes and close the Window.

Delete Time Eligibility Rule

To delete a Time Eligibility Rule:

1. Click the rule in the Time Eligibility List.

   A Time Rule Definition Window opens.

2. Click the **Delete Rule** button.
3. A confirmation Window opens.
4. Click **OK** to delete the Rule and close the Time Rule Definition Window, or click **Cancel** to return to the Time Rule Definition Window.

Tender Eligibility

Tender eligibility rules determine whether a Relate element is enabled for a transaction, depending upon the tender used in a transaction.

Define Tender Eligibility

Tenders are selected for eligibility or ineligibility through Check Box configurations. To define Tender Eligibility for a Relate element:

- The **Enable all tender types** Check Box is checked (☑), all tenders are eligible for the Issue Rule.

  ☑ Enable all tenders types. (No restrictions will be placed on the eligibility rule.)

  Figure 1-61: Enable All Tender Types Check Box

- If the **Enable all tender types** Check Box is unchecked (☐), tenders must be individually selected as being eligible for the Issue Rule.

☐ Enable all tenders types. (No restrictions will be placed on the eligibility rule.)

	Tender Types	ID
☐	Account Credit	ACCOUNT_CREDIT
☐	Accounts Receivable	ACCOUNT_RECEIVABLE
☐	American Express cards	AMERICAN EXPRESS
☐	American Express Credit Card	AMERICAN_EXPRESS
☐	Canada Cash	CAD_CURRENCY
☐	Canadian Traveler Cheque	CAD TRAVELERS CHECK

Figure 1-62: Select Individual Tender Types

- Click to place a check mark (☑) in the Check Box for each tender that is eligible for the Issue Rule.
- If a Customer uses a tender that is unchecked (☐), that transaction will not qualify for points issued by the Issue Rule.

CHAPTER 2

Customers

Overview

Customer records store basic information about each Customer. These records can be associated with a Card or account that is used to track transactions and provide incentives to Customers.

Customer records can be used to track individual Customers and their shopping preferences, habits, and tendencies. This allows locations and chains to target promotions to Customers most likely to take advantage of purchase incentives given by the location or chain.

About This Chapter

This chapter contains the following information:

- "Customer Lookup/Edit" on page 70 describes the Customer Lookup/Edit page and the procedure for looking up Customers.
- "Customer Dashboard" on page 76 describes the Customer Dashboard and the information displayed on it.
- "Edit/View Customer Record" on page 89 describes the screens used to edit Customer records and view Customer data.
- "Customer Validation" on page 159 describes Customer validation rules in Relate.

Customer Lookup/Edit

The Customer Lookup/Edit page is used to search for Customers and Customer information stored in Relate. Through the Customer Lookup/Edit page, Users can locate a Customer record and make changes to that record.

Customer Lookup

A Customer lookup is used to find a specific Customer in Relate.

> *This is different from a Clienteling Search, which searches for a set of Customers that meet, certain specified criteria.*

To look up a Customer in Relate:

1. Open the Customer Lookup/Edit page with the **Customer->Customer Lookup/Edit** menu option, or by clicking the **Customer Lookup/Edit** Link on the Main Page.

   The Customer Lookup/Edit page opens.

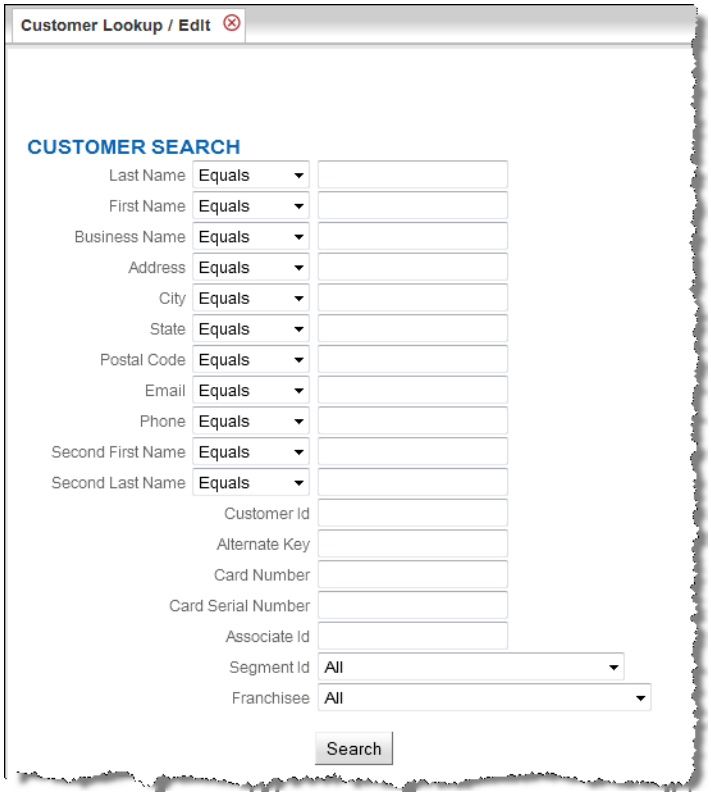


Figure 2-1: Customer Lookup/Edit Page

2. Enter the search information for the Customer.



Be as specific as possible when entering search information. The more specific the information, the fewer Customer records will be returned.

The Customer Lookup/Edit page uses the following Data Elements for search entry:

- **Last Name** - Customer last name (uses a Matching Rule Menu).
- **First Name** - Customer first name (uses a Matching Rule Menu).
- **Business Name** - Name of the Customer's business (uses a Matching Rule Menu).
- **Address** - Address line for the Customer—searches Address Line 1 in the record (uses a Matching Rule Menu).
- **City** - Customer city (uses a Matching Rule Menu).
- **State** - Customer state or province (uses a Matching Rule Menu).
- **Postal Code** - Customer Postal Code or ZIP Code (uses a Matching Rule Menu).
- **Email** - Customer email address (uses a Matching Rule Menu).
- **Phone** - Customer telephone number (uses a Matching Rule Menu).
- **Second First Name** - Customer's second first name (uses a Matching Rule Menu).

  This field only appears if the system is configured to display additional customer names. See the Relate Configuration Guide *for more information.*
- **Second Last Name** - Customer's second last name (uses a Matching Rule Menu).

  This field only appears if the system is configured to display additional customer names. See the Relate Configuration Guide *for more information.*
- **Customer Id** - Customer ID.
- **Alternate Key** - Customer Alternate Key.
- **Card Number** - Card Number associated with the Customer.
- **Card Serial Number** - Serial Number of the Card associated with the Customer.
- **Associate ID** - ID of an Associate assigned to the Customer.
- **Segment Id** - ID for a Customer segment.
- **Franchisee** - Name of the Franchisee.

3. Click **Search** to perform the search.

Relate returns a List of all the Customer records that match the entered search criteria.

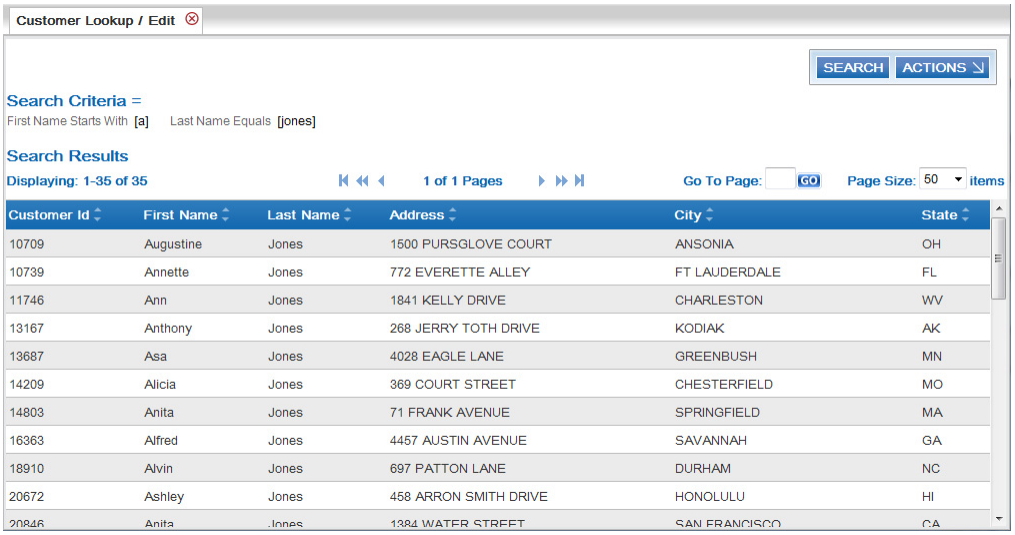


Figure 2-2: Customer Search Results List

Customer List

The Customer List is accessed through the Customer Lookup process.

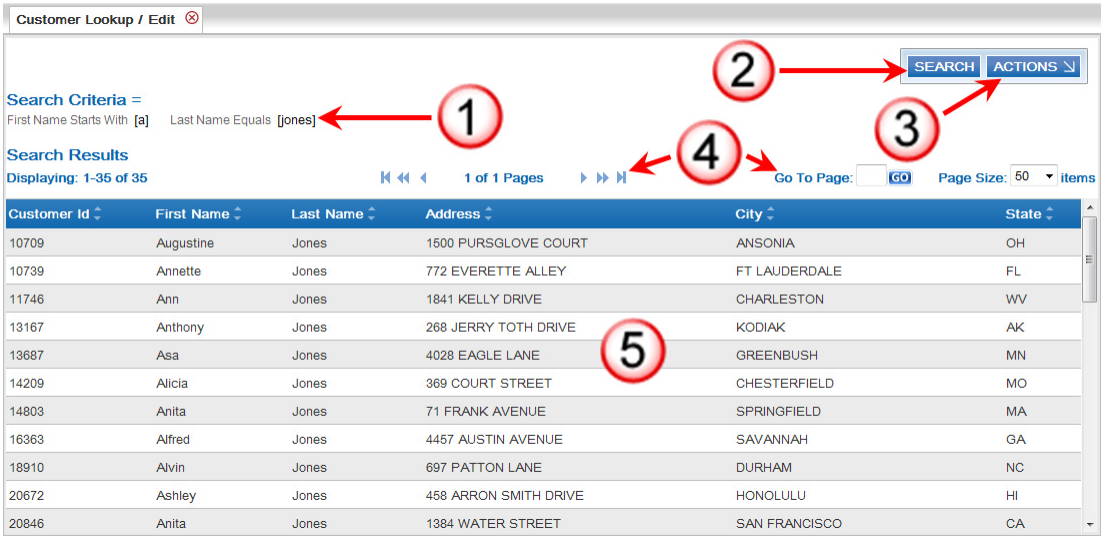


Figure 2-3: Customer List

Table 2-1: *Customer List Page Key*

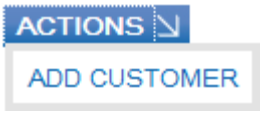
Item	Description
1	**Search Criteria** - Displays the search criteria used for the search results displayed in the List.

Table 2-1: *Customer List Page Key (continued)*

Item	Description
2	**Search Button** - Click to return to the Customer Lookup/Edit page and perform another search.
3	**Actions Menu** - Click to open a menu of actions that can be performed in the Customer List page. See "Actions Menu" on page 73 for more information.
4	**Page Navigation** - Page Navigation for the List.
5	**Customer List** - A List of Customers currently in the system that match the search criteria. This List includes the following information for each Customer: ■ **Customer Id** - Unique identifier for the Customer. ■ **First Name** - Customer's first name. ■ **Last Name** - Customer's last name. ■ **Address** - Street address for the Customer. ■ **City** - Customer's city. ■ **State** - State or province for the Customer.

Actions Menu

The Actions Menu for the Customer List page includes the following option:



- ❑ **ADD CUSTOMER** - Create a new Customer. See "Create a Customer" on page 92.

Open a Customer Record

To open a Customer Record in the Customer List, click the Customer in the List. The Customer record is opened in a Customer Summary Window.

Customer Summary Window

The Customer Summary Window displays summary information for a Customer.

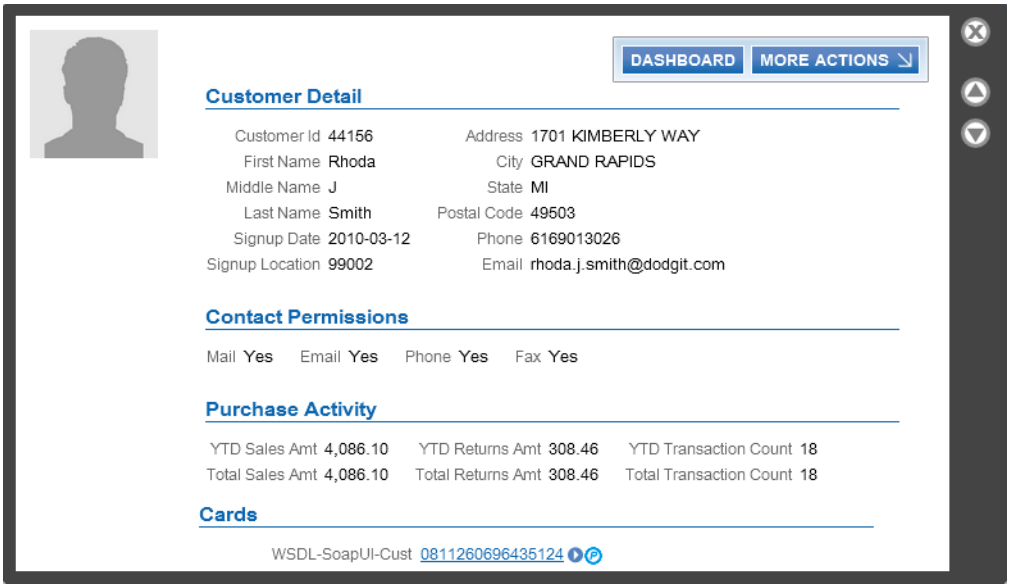


Figure 2-4: Customer Summary Window

This Window displays the following information:

- **Customer Detail** - Details about the Customer. This area displays the following information:
  - **Customer Id** - Customer ID
  - **First Name** - Customer first name
  - **Second First Name** - Customer's second first name

    This field only appears if the system is configured to display additional customer names. See the Relate Configuration Guide *for more information.*
  - **Middle Name** - Customer middle name
  - **Last Name** - Customer last name
  - **Second Last Name** - Customer's second last name

    This field only appears if the system is configured to display additional customer names. See the Relate Configuration Guide *for more information.*
  - **Signup Date** - Date the Customer was signed up
  - **Signup Location** - Location ID of the Location where the Customer signed up
  - **Address** - Address line 1 for the Customer
  - **City** - Customer city
  - **State** - Customer state or province
  - **Postal Code** - Customer Postal Code or ZIP Code

- **Phone** - Customer telephone number
- **Email** - Customer email address

- **Contact Permissions** - Indicates the methods through which the Customer may be contacted. This area displays the following information:
  - **Mail** - Indicates whether the Customer can be contacted by mail
  - **Email** - Indicates whether the Customer can be contacted by email
  - **Phone** - Indicates whether the Customer can be contacted by phone
  - **Fax** - Indicates whether the Customer can be contacted by fax
- **Purchase Activity** - Displays the purchase activity recorded for the Customer. This area displays the following information:
  - **YTD Sales Amt** - Amount of all sales associated with the Customer during the year to date.
  - **YTD Returns Amt** - Amount of all returns associated with the Customer during the year to date.
  - **YTD Transaction Count** - Number of transactions, during the year to date, associated with the Customer
  - **Total Sales Amt** - Total amount of all sales associated with the Customer.
  - **Total Returns Amt** - Total amount of all returns associated with the Customer.
  - **Total Transaction Count** - Total number of transactions associated with the Customer.
- **Cards** - Lists the Cards associated with the Customer. This area displays the following information:
  - The type of Card.
  - The Card Number Link and an icon ( ) that can be clicked to open a menu with the following option:

    - **CARD ADMINISTRATION** - Open the Card in the Card/Account Administration page. See Chapter 18, "Card/Account Administration" on page 530.
  - If the Customer is the primary holder of the Card, the primary holder icon ( ) will be shown.

More Actions Menu



The More Actions Menu displayed in the Customer Summary Window (see Figure 2-4 on page 74) provides access to some Customer functions without going through the Customer Dashboard. These functions are:

- **CUSTOMER** - Edit Customer Information found in the Customer Basics and Customer Data sections (see "Customer Information" on page 89).
- **CARD ASSOCIATION** - Add, edit, or delete Cards associated with the Customer (see "Card Association" on page 110).

Open Customer Dashboard

To open a Customer in the Customer Dashboard, click the **DASHBOARD** button in the Customer Summary Window.

Customer Dashboard

The Customer Dashboard displays all the information available for a Customer and provides access to pages for editing Customer Information. The Customer Dashboard can be accessed through the Customer Lookup procedure described above, through the Clienteling Search procedure, or through the Gift Registry Lookup procedure.

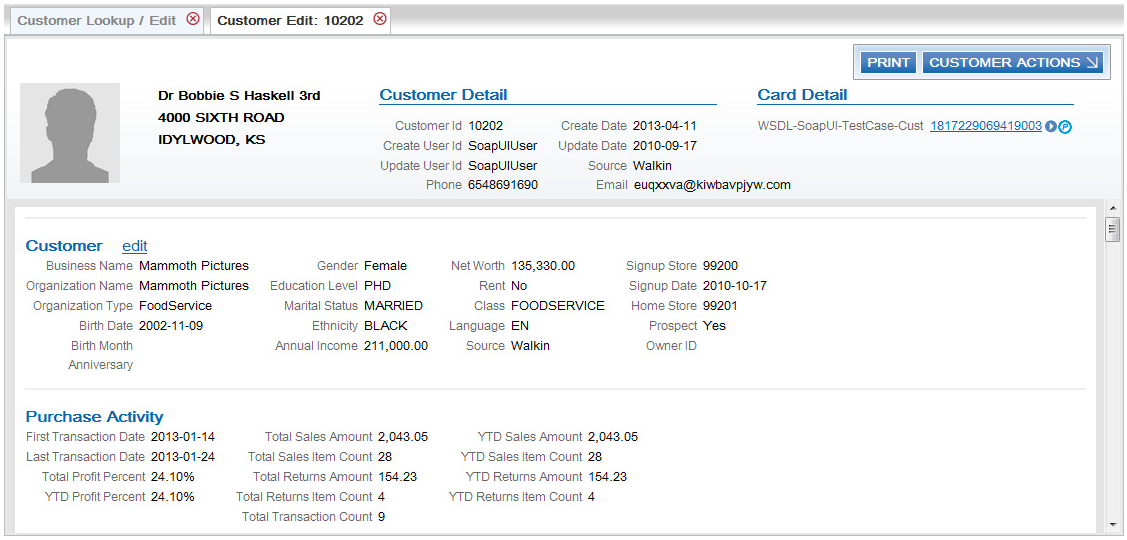


Figure 2-5: Customer Dashboard

The information displayed in the Customer Dashboard is divided into several sections:

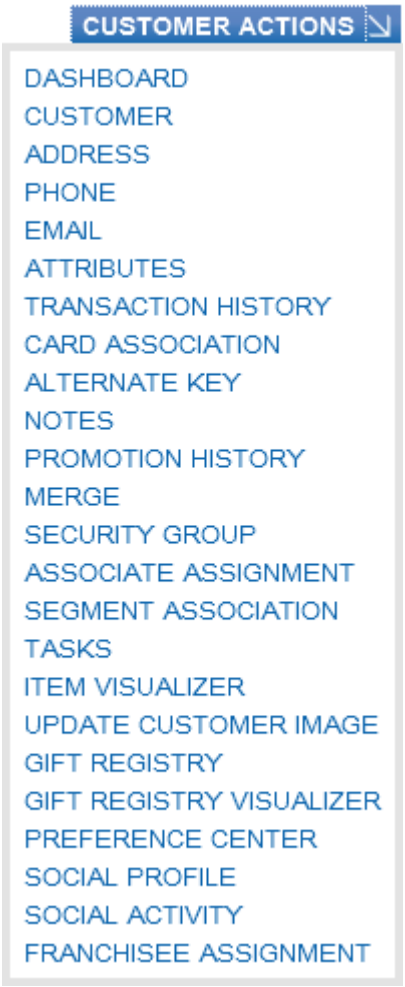
- **Customer Basics** - Basic information about the Customer, such as Name, Primary Address, Customer ID, etc. See "Customer Basics" on page 79.
- **Customer Data** - Data collected for the Customer, such as Business Name, Birth Date, Gender, Marital Status, etc. See "Customer Data" on page 80.
- **Purchase Activity** - Sales statistics for the Customer. See "Purchase Activity" on page 81.
- **Associate Assignments** - Associates assigned to the Customer. See "Associate Assignments" on page 82.
- **Addresses** - Physical addresses for the Customer, such as home and business addresses. See "Addresses" on page 82.
- **Email Addresses** - Email addresses for the Customer. See "Email" on page 83.
- **Telephone Numbers** - Phone numbers for the Customer. See "Telephone Numbers" on page 83.
- **Customer Attributes** - Attributes assigned to the Customer. See "Customer Attributes" on page 84.

- **Alternate Keys** - Alternate keys assigned to the Customer. See "Alternate Key" on page 84.
- **Cards/Accounts** - Cards and accounts associated with the Customer. See "Cards/Accounts" on page 84.
- **Customer Notes** - Notes written about the Customer. See "Customer Notes" on page 85.
- **Segment Association** - Segments to which the Customer belongs. See "Segment Association" on page 86.
- **Top 3 Depts - Current Calendar Year** - Statistics and charts displaying the top purchases by the Customer. See "Top 3 Depts - Current Calendar Year" on page 86.
- **Promotion Events/Responses** - Statistics and charts showing the rate at which the Customer responds to Promotions. See "Promotion Events/Responses" on page 87.
- **Preference Centers** - Preference Centers to which the Customer is assigned. See "Preference Centers" on page 87.
- **Social Profile** - Social networks associated with the Customer. See "Social Profile" on page 88.
- **Franchisee Assignments** - Franchisees to whom the Customer has been assigned. See "Franchisee Assignments" on page 88.

Many of the sections have an **edit** Link next to the section name. Click the **edit** Link to edit the information/data in that section.

Customer Actions Menu

The Customer Actions menu is the Actions Menu for the Customer Dashboard. It provides the ability to view and edit information/data associated with the Customer.



The Customer Actions menu has the following options:

- **DASHBOARD** - Return to the Customer Dashboard.
- **CUSTOMER** - Edit basic Customer information (see "Customer Information" on page 89).
- **ADDRESS** - Add, edit, or delete Customer Addresses (see "Address" on page 92).
- **PHONE** - Add, edit, or delete Customer Telephone Numbers (see "Telephone Numbers" on page 95).
- **EMAIL** - Add, edit, or delete Customer Email Addresses (see "Email" on page 98).
- **ATTRIBUTES** - Add, edit, or delete Customer Attributes (see "Attributes" on page 101).
- **TRANSACTION HISTORY** - View the Transaction History for the Customer (see "Transaction History" on page 103).
- **CARD ASSOCIATION** - Add, edit, or delete Cards associated with the Customer (see "Card Association" on page 110).
- **ALTERNATE KEY** - Add, view, or delete Alternate Keys assigned to the Customer (see "Alternate Keys" on page 116).
- **NOTES** - View or add Customer Notes (see "Customer Notes" on page 118).
- **PROMOTION HISTORY** - View the Promotion History for the Customer (see "Promotion History" on page 120).
- **MERGE** - Merge Customer records (see "Customer Merge" on page 122).
- **SECURITY GROUP** - Add, view, or delete the Security Groups assigned to the Customer (see "Security Groups" on page 126).
- **ASSOCIATE ASSIGNMENT** - Add, view, or delete Associate assignments (see "Associate Assignments" on page 129).
- **SEGMENT ASSOCIATION** - View the Segments to which the Customer belongs, or add the Customer to one or more Segments (see "Segment Association" on page 133).
- **TASKS** - Add, view, or delete Tasks attached to the Customer (see "Tasks" on page 136).
- **ITEM VISUALIZER** - Displays recently purchased items and items on the Customer's Wish List (see "Item Visualizer/Wish List" on page 138).

- ❑ **UPDATE CUSTOMER IMAGE** - Upload a new image for the Customer (see "Update Customer Image" on page 142).
- ❑ **GIFT REGISTRY** - View the Customer Gift Registries associated with the Customer (see "Gift Registry" on page 144).
- ❑ **GIFT REGISTRY VISUALIZER** - View the Items in a Customer Gift Registry (see "Gift Registry Visualizer" on page 147).
- ❑ **PREFERENCE CENTER** - View the Preference Center settings for the Customer (see "Preference Centers" on page 150).
- ❑ **SOCIAL PROFILE** - View the Social Profiles associated with the Customer (see "Social Profile" on page 155).
- ❑ **SOCIAL ACTIVITY** - View the social media posts made by the Customer (see "Social Activity" on page 157).
- ❑ **FRANCHISEE ASSIGNMENT** - View or edit the Franchisees to whom the Customer has been assigned (see "Franchisee Assignment" on page 158).

Customer Basics

The Customer Basics area is displayed in all areas of Customer editing and the Customer Dashboard. The Customer Basics provides basic information about the Customer.

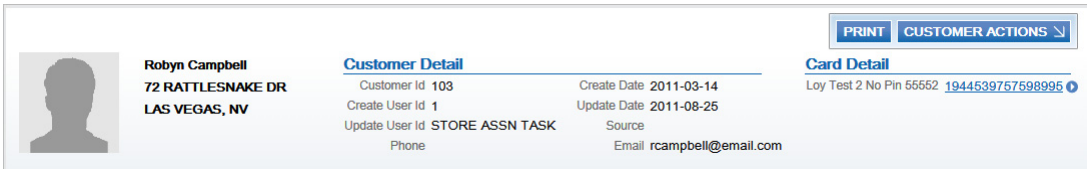


Figure 2-6: Customer Basics Area

The Customer Basics area contains the following information:

- **Customer Picture** (if available)
- Customer **Name**
- Primary **Address**
- **Customer Id** used by Relate
- **Create User Id** of user who created the Customer record
- **Update User Id** of user who last updated the Customer record
- Primary **Phone** Number
- **Create Date** for the Customer record
- Last **Update Date** for the Customer record
- **Source** of the Customer record
- Primary **Email** address
- **Card Detail** of the Card(s) associated with the Customer; the Card(s) can be opened in the Card Administration page (see "Open Card" on page 80)

  If the primary cardholder icon (Ⓟ) is displayed next to the Card Number, the current Customer is the primary holder of the Card

Open Card

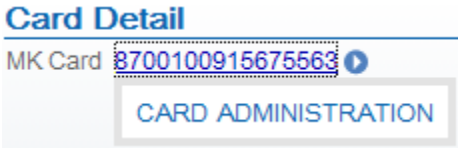
To open a Card listed in the Card Detail in the Card/Account Administration page:

1. In the Card Detail area, click the Card Number Link.

   A menu is displayed.

2. Click **CARD ADMINISTRATION** in the menu.

   The Card is opened in the Card/Account Administration page.



For more information about the Card/Account Administration page and the actions that can be performed within it, see Chapter 18, "Card/Account Administration" on page 530.

Customer Data

The Customer Data section of the Customer Dashboard displays basic data about the Customer.



Figure 2-7: Customer Data Section

The Customer Data section contains the following information:

- **Business Name** - Name of the business associated with the Customer.
- **Organization Name** - Name of the organization associated with the Customer.
- **Organization Type** - Type of organization associated with the Customer.
- **Birth Date** - Date of birth for the Customer.
- **Birth Month** - Month of the Customer's birthday.
- **Anniversary** - Customer anniversary.
- **Gender** - Gender of the Customer.
- **Education Level** - Highest level of education completed by the Customer.
- **Marital Status** - Current marital status of the Customer.
- **Ethnicity** - Ethnicity of the Customer.
- **Annual Income** - Annual income of the Customer.
- **Net Worth** - Net worth of the Customer.
- **Rent** - Indicates whether the Customer name can be rented to other companies for prospecting efforts.
- **Class** - The class to which the Customer belongs.
- **Language** - The Customer's preferred language.

- **Source** - The source for the Customer.
- **Signup Location** - Location where the Customer signed up.
- **Signup Date** - Date the Customer signed up.
- **Home Location** - Home location for the Customer.
- **Prospect** - Indicates whether the Customer is a prospect.
- **Owner ID** - ID for the Associate who owns the Customer record.

Purchase Activity

The Purchase Activity section of the Customer Dashboard provides summary information about the purchases made by the Customer.

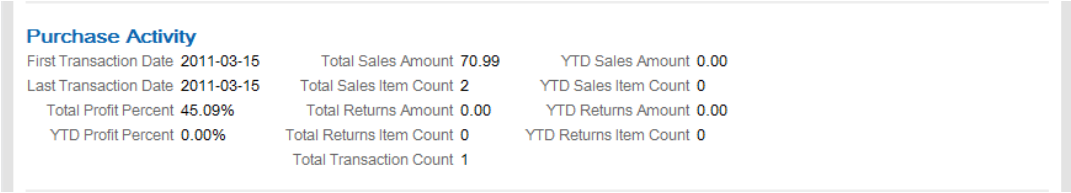


Figure 2-8: Purchase Activity Section

The Purchase Activity section contains the following information:

- **First Transaction Date** - Date of the Customer's first transaction.
- **Last Transaction Date** - Date of the Customer's most recent transaction.
- **Total Profit Percent** - The percentage of profit made from all of the Customer's transactions.
- **YTD Profit Percent** - The percentage of profit made from all of the Customer's transactions so far this year.
- **Total Sales Amount** - The total amount of all sales made to the Customer.
- **Total Sales Item Count** - The total number of all items sold to the Customer.
- **Total Returns Amount** - The total amount of all returns made by the Customer.
- **Total Returns Item Count** - The total number of all items returned by the Customer.
- **Total Transaction Count** - The total number of transactions performed by the Customer.
- **YTD Sales Amount** - The total amount of the sales made to the Customer during the year-to-date.
- **YTD Sales Item Count** - The total number of items sold to the Customer during the year-to-date.
- **YTD Returns Amount** - The total amount of the returns made by the Customer during the year-to-date.
- **YTD Returns Item Count** - The total number of all items returned by the Customer during the year-to-date.

Associate Assignments

The Associate Assignments section of the Customer Dashboard provides a summary List of all the Associates assigned to the Customer.

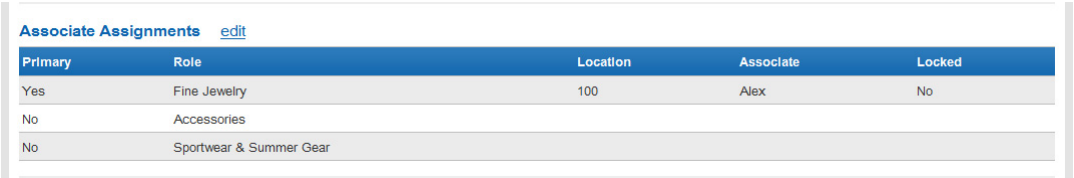


Figure 2-9: Associate Assignments

The Associate Assignments section contains the following information for each Associate assignment.

- **Primary** - Indicates whether the Associate is the primary Associate for the Customer.
  - **Yes** - The Associate is the primary Associate.
  - **No** - The Associate is not the primary Associate.
- **Role** - The role served by the Associate.
- **Location** - The location to which the Associate belongs.
- **Associate** - Name of the Associate.
- **Locked** - Indicates whether the Associate assignment is locked.

Addresses

The Addresses section of the Customer Dashboard provides a summary List of all the addresses associated with the Customer.



Figure 2-10: Addresses Section

The Addresses section contains the following information for each address.

- **Address** - The address for the Customer.
- **Type** - The Type of address.
- **Primary** - Indicates whether the address is the primary address for the Customer.
  - **Yes** - The address is the primary address.
  - **No** - The address is not the primary address.
- **User Label** - User Label for the address.
- **Contact Permission/Opt In** - The contact permission rule for the address.

Email

The Email section of the Customer Dashboard provides a summary List of all the email addresses associated with the Customer.

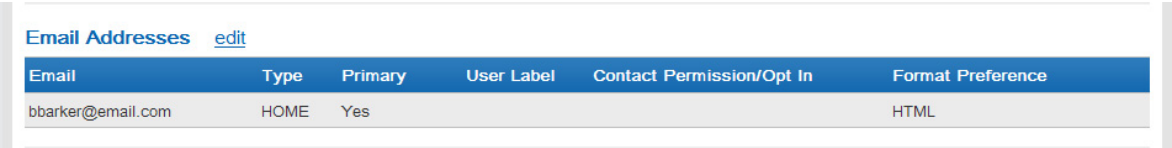


Figure 2-11: Email Section

The Email section contains the following information for each email:

- **Email** - The Email address.
- **Type** - The Type of email address.
- **Primary** - Indicates whether the email is the primary email for the Customer.
  - **Yes** - The email is the primary email address.
  - **No** - The email is not the primary email address.
- **User Label** - User Label for the email address.
- **Contact Permission/Opt In** - The contact permission rule for the email address.
- **Format Preference** - The preferred format of the emails.

Telephone Numbers

The Telephone Numbers section of the Customer Dashboard provides a summary List of all the telephone numbers associated with the Customer.

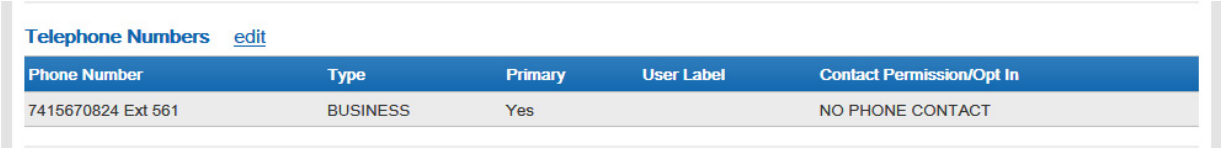


Figure 2-12: Telephone Numbers Section

The Telephone Numbers section contains the following information for each telephone number:

- **Phone Number** - The telephone number, including the extension (if any).
- **Type** - The Type of telephone number.
- **Primary** - Indicates whether the email is the primary telephone number for the Customer.
  - **Yes** - The phone is the primary telephone number.
  - **No** - The phone is not the primary telephone number.
- **User Label** - User Label for the telephone number.
- **Contact Permission/Opt In** - The contact permission rule for the telephone number.

Customer Attributes

The Customer Attributes section of the Customer Dashboard provides a List of all the attributes and attribute values associated with the Customer.



Figure 2-13: Customer Attributes Section

The Customer Attribute section contains the following information for each customer attribute:

- **Group** - The group associated with the attribute.
- **Name** - The name of the attribute.
- **Value** - The value set for the attribute.
- **Description** - Description of the information provided by the attribute.

Alternate Key

The Alternate Key section of the Customer Dashboard displays all of the Alternate Key types and Alternate Key values associated with the Customer.

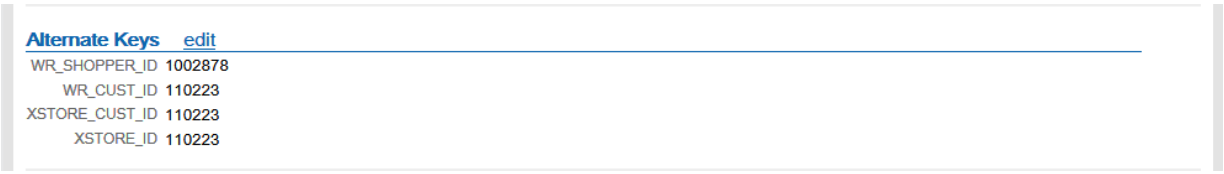


Figure 2-14: Alternate Key Section

Cards/Accounts

The Cards/Accounts section of the Customer Dashboard provides information about all the Cards and Accounts associated with the Customer.



Figure 2-15: Cards/Accounts Section

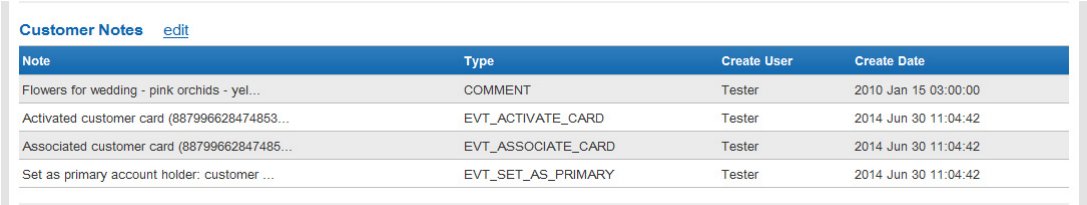
The following information is displayed for each Card:

- **Card** - The Card Number and current status of the Card.

- A List of Accounts associated with the Card. This List contains the following information for each Account:
  - **Program** - The Program to which the Account belongs.
  - **Type** - Type of Account.
  - **Account Number** - The Account Number for the Account.
  - **Program Level** - The Program Level for the Account (only used for Loyalty Accounts).
  - **Balance** - The current Points balance, Tender balance, or Award balance of the Account.
  - **YTD Points** - The year-to-date Loyalty Points balance of the Account (only used for Loyalty Accounts).
  - **LTD Points** - The lifetime-to-date Loyalty Points balance of the Account (only used for Loyalty Accounts).

Customer Notes

The Customer Notes section of the Customer Dashboard provides information about all of the Notes written about the Customer.


Customer Notes edit

Note	Type	Create User	Create Date
Flowers for wedding - pink orchids - yel...	COMMENT	Tester	2010 Jan 15 03:00:00
Activated customer card (887996628474853...	EVT_ACTIVATE_CARD	Tester	2014 Jun 30 11:04:42
Associated customer card (88799662847485...	EVT_ASSOCIATE_CARD	Tester	2014 Jun 30 11:04:42
Set as primary account holder: customer ...	EVT_SET_AS_PRIMARY	Tester	2014 Jun 30 11:04:42

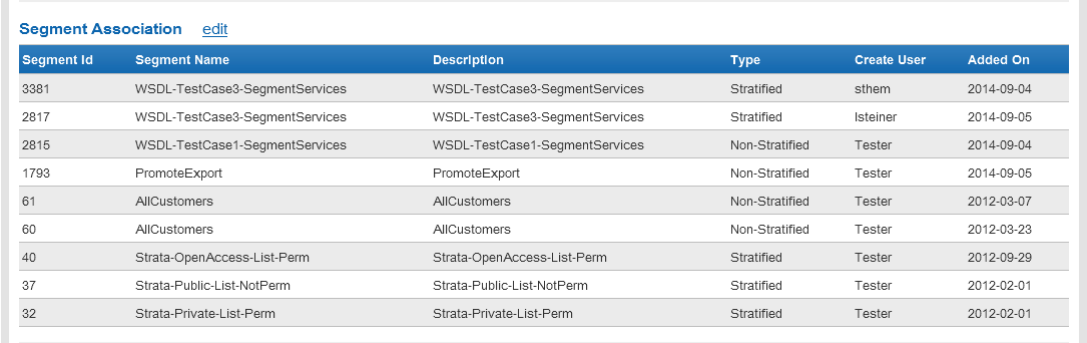
Figure 2-16: Customer Notes Section

The following information is displayed for each Customer Note:

- **Note** - The content of the note.
- **Type** - The type of note.
- **Create User** - The ID of the user who created the record.
- **Create Date** - The date on which the note was created.

Segment Association

The Segment Association section of the Customer Dashboard provides information about all the Segments to which the Customer belongs.



Segment Association edit

Segment Id	Segment Name	Description	Type	Create User	Added On
3381	WSDL-TestCase3-SegmentServices	WSDL-TestCase3-SegmentServices	Stratified	sthem	2014-09-04
2817	WSDL-TestCase3-SegmentServices	WSDL-TestCase3-SegmentServices	Stratified	lsteiner	2014-09-05
2815	WSDL-TestCase1-SegmentServices	WSDL-TestCase1-SegmentServices	Non-Stratified	Tester	2014-09-04
1793	PromoteExport	PromoteExport	Non-Stratified	Tester	2014-09-05
61	AllCustomers	AllCustomers	Non-Stratified	Tester	2012-03-07
60	AllCustomers	AllCustomers	Non-Stratified	Tester	2012-03-23
40	Strata-OpenAccess-List-Perm	Strata-OpenAccess-List-Perm	Stratified	Tester	2012-09-29
37	Strata-Public-List-NotPerm	Strata-Public-List-NotPerm	Stratified	Tester	2012-02-01
32	Strata-Private-List-Perm	Strata-Private-List-Perm	Stratified	Tester	2012-02-01

Figure 2-17: Segment Association Section

The following information is displayed for each Segment associated with the Customer:

- **Segment Id** - ID of the Segment.
- **Segment Name** - Name of the Segment.
- **Description** - Description of the Segment.
- **Type** - Type of Segment.
- **Create User** - The User who created the Segment.
- **Added On** - The date on which the Customer was added to the Segment.

Top 3 Depts - Current Calendar Year

The Top 3 Depts - Current Calendar Year section displays the three Departments (by revenue) from which the Customer made purchases during the current year. It displays a bar graph displaying the relative revenue amounts received from the three Departments.

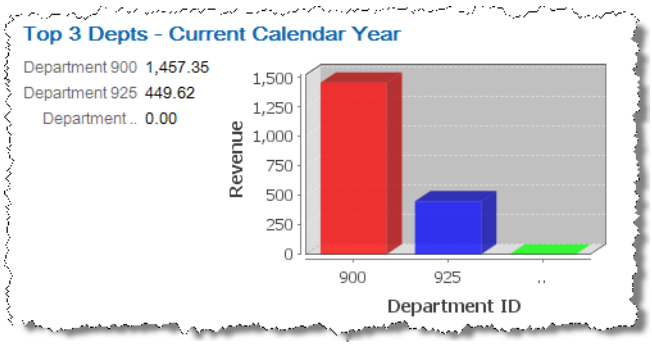


Figure 2-18: Top 3 Depts - Current Calendar Year

Promotion Events/Responses

The Promotion Events/Responses section displays the Promotions to which the Customer has responded. For each Promotion responded to, it displays the name of the Promotion, the Promotion ID, and the total amount of the purchases made for that Promotion.

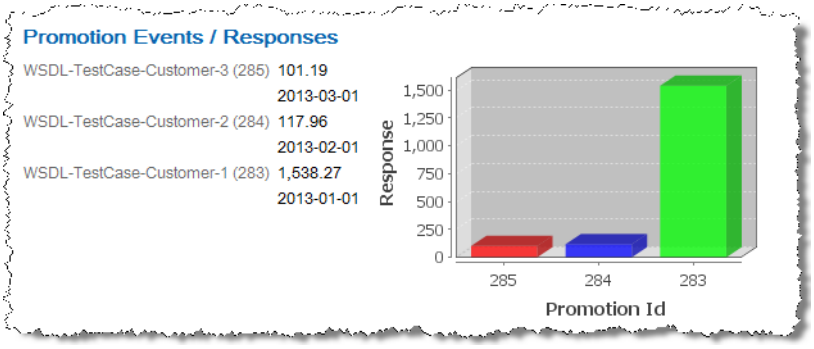
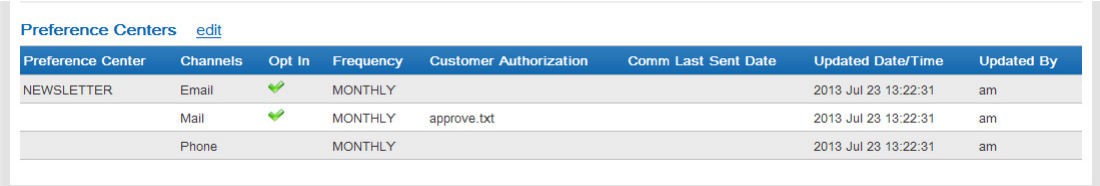


Figure 2-19: Promotion Events/Responses

Preference Centers

The Preference Centers section displays information about all the Preference Centers to which the Customer is assigned.


Preference Centers edit

Preference Center	Channels	Opt In	Frequency	Customer Authorization	Comm Last Sent Date	Updated Date/Time	Updated By
NEWSLETTER	Email	✔	MONTHLY			2013 Jul 23 13:22:31	am
	Mail	✔	MONTHLY	approve.txt		2013 Jul 23 13:22:31	am
	Phone		MONTHLY			2013 Jul 23 13:22:31	am

Figure 2-20: Preference Centers Section

The following information is displayed for each Preference Center:

- **Preference Center** - Name of the Preference Center. This is displayed only for the first channel in a Preference Center.
- **Channels** - The communication channel.
- **Opt In** - Indicates whether the Customer has opted to be contacted through the channel. If there is a check mark (✔) in the field, the Customer will be contacted through the channel.
- **Frequency** - The frequency at which the Customer will be contacted through the channel.
- **Customer Authorization** - Name of the file in which the Customer authorized communication.
- **Comm Last Sent Date** - Last date on which the Customer was sent a communication via the channel.
- **Updated Date/Time** - Date and time the channel was last updated.
- **Updated By** - ID of the User who last updated the channel.

Social Profile

The Social Profile section displays information about the social networks associated with the Customer.

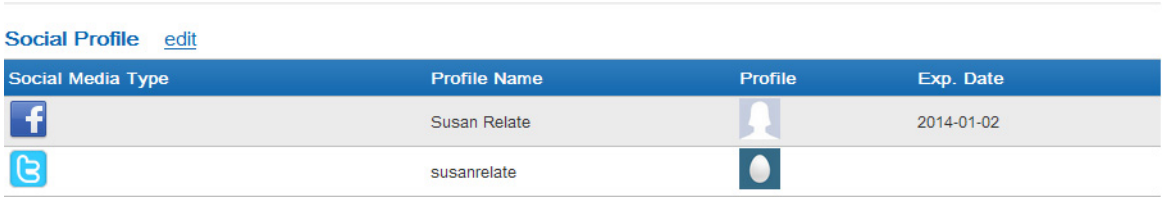


Figure 2-21: Social Profile Section

The following information is displayed for each Social Network:

- **Social Media Type** - An icon indicating the social media network associated with the Social Profile.
- **Profile Name** - Name of the social profile.
- **Profile** - Image representing the customer on the social network.
- **Exp. Date** - Date the token associated with the network expires.

Franchisee Assignments

The Franchisee Assignments Section displays information about the Franchisees to whom the Customer has been assigned.

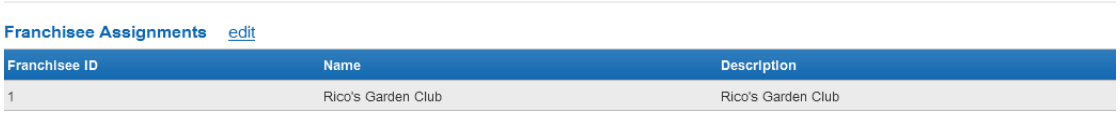


Figure 2-22: Franchisee Assignment Section

The following information is displayed for each Franchisee Assignment:

- **Franchisee ID** - ID of the Franchisee.
- **Name** - Name of the Franchisee.
- **Description** - A description of the Franchisee.

Edit/View Customer Record

The process for editing or viewing information in a Customer record depends upon the information that is being edited or viewed.

Customer Information

The Customer Information screen enables users to view or edit Customer information in the Customer Basics and Customer Data sections of the Customer Dashboard.

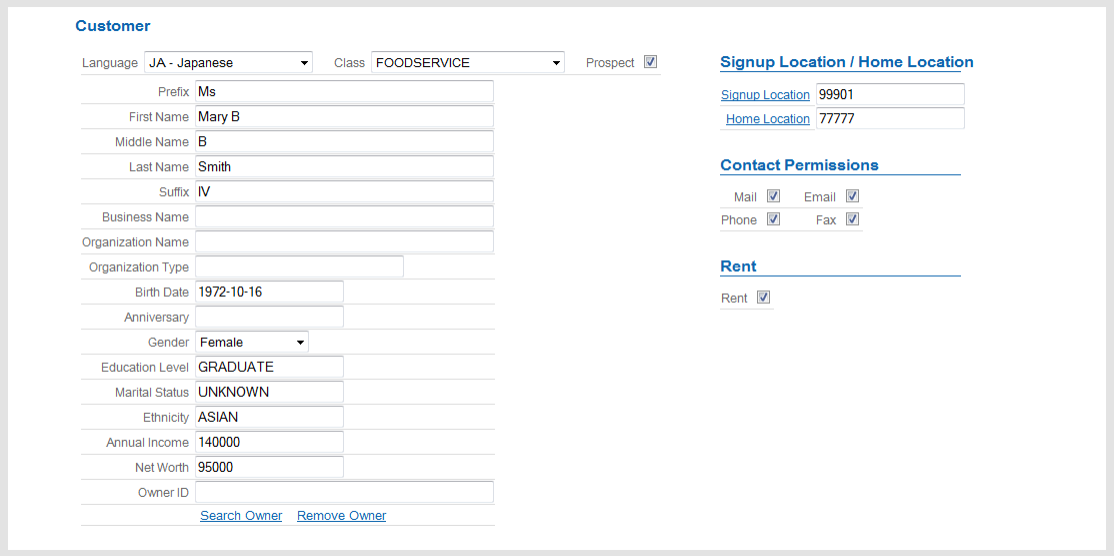


Figure 2-23: Edit Customer Information Screen

This screen contains the following fields:

- **Language** - **[REQUIRED]** The Customer's preferred language.
- **Class** - **[REQUIRED]** The class to which the Customer belongs.
- **Prospect** - **[OPTIONAL]** Indicates whether the Customer is a prospect.
- **Prefix** - **[OPTIONAL]** Prefix to the Customer name.
- **First Name** - **[OPTIONAL]** First name for the Customer.
- **Middle Name** - **[OPTIONAL]** Middle name or middle initial for the Customer.
- **Last Name** - **[OPTIONAL]** Last name for the Customer.
- **Suffix** - **[OPTIONAL]** Suffix to the Customer name.
- **Business Name** - **[OPTIONAL]** Name of the business associated with the Customer.
- **Organization Name** - **[OPTIONAL]** Name of the organization associated with the Customer.
- **Organization Type** - **[OPTIONAL]** Type of organization associated with the Customer.
- **Second First Name** - **[OPTIONAL]** Second first name for the Customer.

  This field only appears if the system is configured to display additional customer names. See the Relate Configuration Guide *for more information.*

- **Second Last Name** - **[OPTIONAL]** Second last name for the Customer.

  This field only appears if the system is configured to display additional customer names. See the Relate Configuration Guide *for more information.*
- **Birth Date** - **[OPTIONAL]** Customer birth date.
- **Anniversary** - **[OPTIONAL]** Customer anniversary.
- **Gender** - **[OPTIONAL]** Customer gender.
- **Education Level** - **[OPTIONAL]** Education level of the Customer.
- **Marital Status** - **[OPTIONAL]** Marital status of the Customer.
- **Ethnicity** - **[OPTIONAL]** Customer ethnicity.
- **Annual Income** - **[OPTIONAL]** Customer's annual income.
- **Net Worth** - **[OPTIONAL]** Net worth of the Customer.
- **Owner ID** - **[OPTIONAL]** ID of the associate who owns the Customer record.
- **Signup Location** - **[OPTIONAL]** Location where the Customer signed up.
- **Home Location** - **[OPTIONAL]** Home location for the Customer.
- **Contact Permissions** - This Check Box set determines the methods that can be used to contact the Customer: **Mail**, **Email**, **Telephone**, and/or **Fax**.
- **Rent** - This Check Box Indicates whether the Customer name can be rented to other companies for prospecting efforts.

Edit Customer Information

To edit the information in the Customer Basics and/or Customer Data sections:

1. Access the Customer Information screen by doing one of the following:

   ❑ Click **CUSTOMER** in the Actions Menu of the Customer summary pop-up Window in the Customer Lookup/Edit page.

   ❑ Click the **edit** Link in the Customer Data section of the Customer Dashboard.

   The Customer Information screen opens.

2. Make the necessary changes to the fields. See "Customer Information" on page 89 for more information about the fields.

   To change the Owner for the Customer, perform the procedure "Search for New Owner" on page 91.

3. After updating the record, click **Save** to save the changes.

   To discard the changes, use the Customer Actions Menu to navigate away from the Customer Information screen, or close the tab.

Search for New Owner

To add or change the Owner for a Customer:

> *The owner of a Customer record will always have full read and write access to the Customer, regardless of Security Group configuration.*

1. In the Customer Information screen, click the **Search Owner** Link.

   A Search User Window opens.

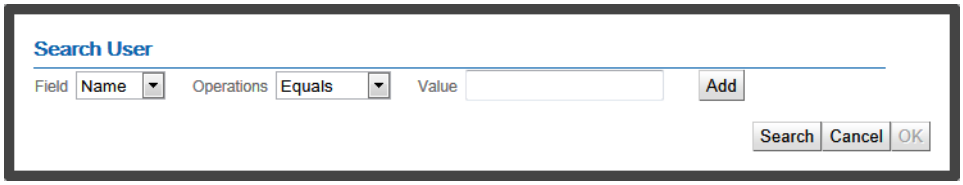


Figure 2-24: Search User Window

2. Use the **Field** Selection Menu to select the criteria on which to search.
3. Use the **Operations** Matching Rule Menu to select the matching rule.
4. Enter the **Value** to search for.
5. If necessary, add or delete search criteria:
   - ❑ To add another search criteria, click the **Add** button, then repeat steps 2-4 in the new search criteria fields.
   - ❑ To delete an unneeded set of search criteria fields click the **Delete** button for the search criteria.
6. Click the **Search** button to perform the search.

   The search results are displayed in a List.

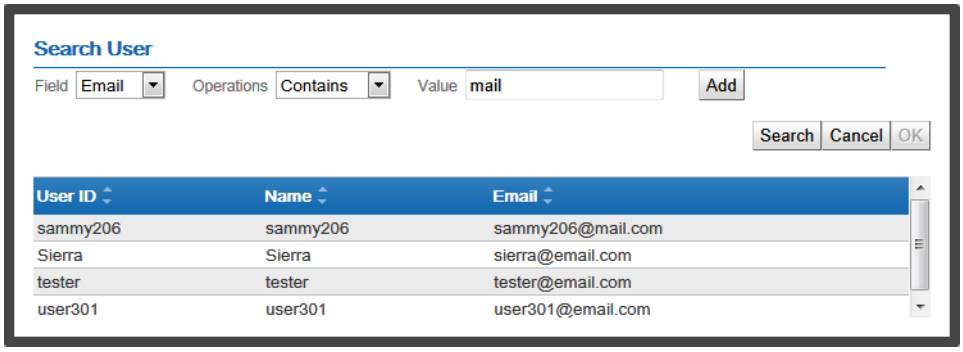


Figure 2-25: Search User - Search Results

7. Do one of the following:

- ❑ To add an Owner ID, click to select a User, then click the **OK** button. Relate returns to the Customer Information screen and the User ID is inserted into the Owner ID field.
- ❑ To search for a different User, return to step 2 to change the search criteria.
- ❑ To return to the Customer Information screen without adding an Owner ID, click the **Cancel** button.

Remove an Owner

To remove an Owner from a Customer record, click the **Remove Owner** Link in the Customer Information screen. The ID for the owner is removed from the **Owner ID** field.

Create a Customer

To create a new Customer in Relate:

1. Do one of the following:
   - ❑ In the Customer Lookup/Edit page, click the **Add** button.
   - ❑ In the Customer List, click **ADD CUSTOMER** in the Actions Menu.

   The Customer Information screen opens with the fields blank.
2. Enter the necessary information into the fields. See "Customer Information" on page 89 for more information.
3. After updating the record, click **Save** to save the changes.

   To discard the changes, use the Customer Actions Menu to navigate away from the Customer Information screen, or close the tab.

Address

The Address screen enables users to add, update, or delete addresses associated with a Customer. To access the Address screen, do one of the following:

- ❑ Click **ADDRESS** in the Customer Actions Menu.
- ❑ Click the **edit** Link in the Addresses section of the Customer Dashboard.

The Address screen opens.

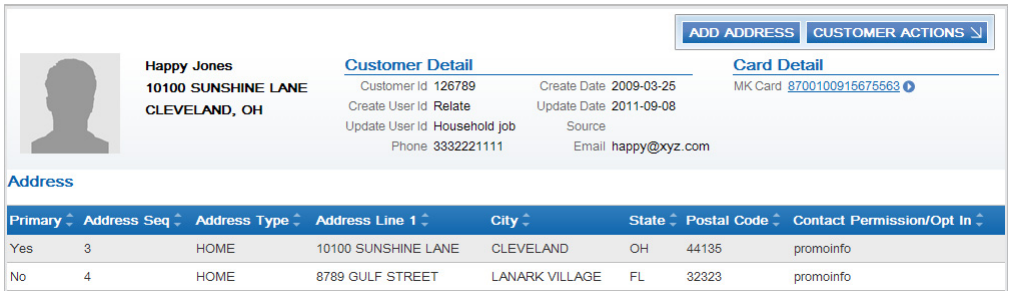


Figure 2-26: Address Screen

Address Screen

The Address screen contains the following information:

- The Customer Basics area.
- An Address List displaying the following information for each address:
  - **Primary** - Indicates whether the address is the primary address for the Customer.
    - **Yes** - The address is the primary address.
    - **No** - The address is not the primary address.
  - **Address Seq** - The order in which the address was added to the Customer record.
  - **Address Type** - The Type of address.
  - **Address Line 1** - The first line of the Customer address.
  - **City** - The address city.
  - **State** - The address state or province.
  - **Postal Code** - The Postal Code or ZIP Code for the address.
  - **Contact Permission/Opt In** - The contact permission set for the address.

Address Detail Window

The Address Detail Window is used to enter or update information for a Customer address.

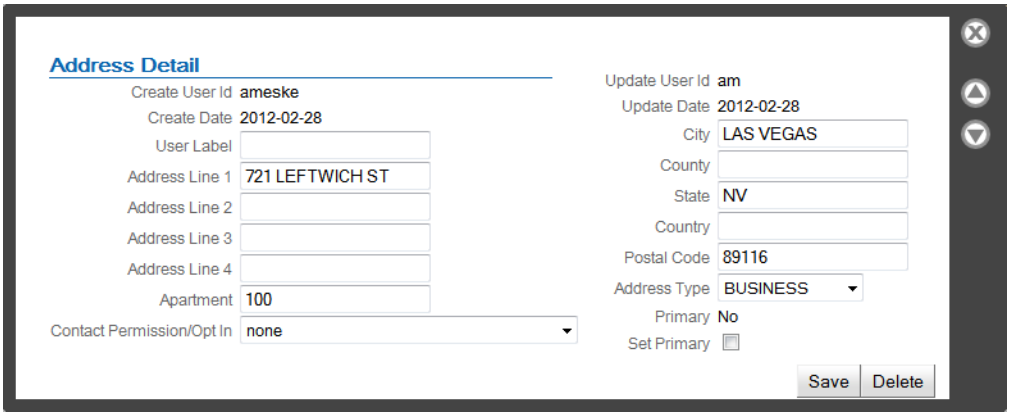


Figure 2-27: Address Detail Window

The Address Detail Window contains the following fields:

- **Create User Id** - ID of the User who created the address. *This field cannot be edited.*
- **Create Date** - Date on which the address was created. *This field cannot be edited.*
- **Update User Id** - Employee ID of the last user to update the address. *This field cannot be edited.*
- **Update Date** - Last date on which the address was updated. *This field cannot be edited.*
- **User Label** - **[OPTIONAL]** User Label for the Customer.
- **Address Line 1** - **[OPTIONAL]** First line of the Customer's address.

- **Address Line 2** - **[OPTIONAL]** Second line of the Customer's address.
- **Address Line 3** - **[OPTIONAL]** Third line of the Customer's address.
- **Address Line 4** - **[OPTIONAL]** Fourth line of the Customer's address.
- **Apartment** - **[OPTIONAL]** Apartment number.
- **Contact Permission/Opt In** - **[OPTIONAL]** Indicates the contact permissions for this address.
- **City** - **[OPTIONAL]** Customer city.
- **County** - **[OPTIONAL]** County of the Customer.
- **State** - **[OPTIONAL]** State or province code for the Customer.
- **Country** - **[OPTIONAL]** Country code for the Customer.
- **Postal Code** - **[OPTIONAL]** Postal Code (ZIP Code) for the Customer.
- **Address Type** - **[REQUIRED]** The type of address.
- **Primary** - Indicates whether the address is the primary address. *This field is edited through the Set Primary Check Box (see below).*
- **Set Primary** - Select this option to make the address the primary address for the Customer; this option is only available if the address is not the primary address.

Edit an Address

To edit an existing address in a Customer record:

1. In the Address screen, click the Address to edit.

   The Address is opened in an Address Detail Window.

2. Make changes to the Address (see "Address Detail Window" on page 93 for more information).

3. Click **Save** to save the changes and close the Address Detail Window.

   To close the Window without saving the changes, click the **X** () in the top-right corner of the Window.

Add an Address

To add a new address into a Customer record:

1. In the Address screen, click the **Add Address** button.

   An Address Detail Window opens with all of the fields blank.

2. Enter the Address information (see "Address Detail Window" on page 93 for more information).

3. Click **Save** to save the changes and close the Address Detail Window.

   To close the Window without saving the changes, click the **X** () in the top-right corner of the Window.

Delete an Address

To delete an address from a Customer record:

1. In the Address screen, click the Address to delete.

   The Address is opened in an Address Detail Window.

2. Click **Delete** to delete the address and close the Address Detail Window.

> *Relate does not ask you to confirm that you want to delete the address.*
> **Once you click the Delete button, the address will be gone!**

To close the Window without deleting, click the **X** ( ) in the top-right corner of the Window.

Telephone Numbers

The Telephone Numbers screen enables users to add, update, or delete telephone numbers associated with a Customer.

To access the Telephone Numbers screen, do one of the following:

- Click **PHONE** in the Customer Actions Menu.
- Click the **edit** Link in the Phones section of the Customer Dashboard.

The Telephone Numbers screen opens.

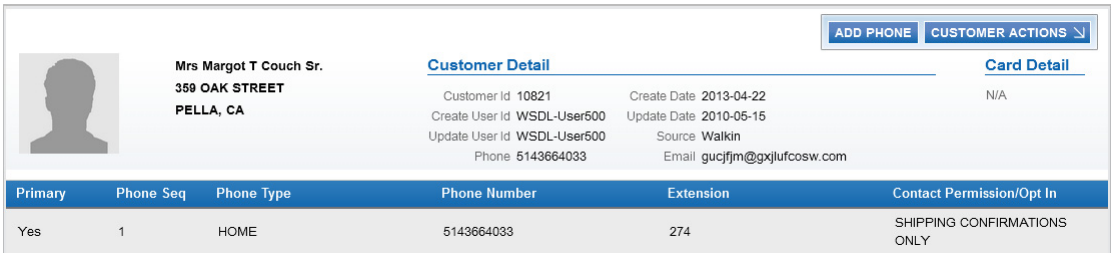


Figure 2-28: Telephone Numbers Screen

Telephone Numbers Screen

The Telephone Numbers screen contains the following information:

- The Customer Basics area.
- A List of telephone numbers containing the following information for each telephone number:
  - **Primary** - Indicates whether it is the primary telephone number for the Customer.
    - **Yes** - The phone is the primary telephone number.
    - **No** - The phone is not the primary telephone number.

- **Phone Seq** - Indicates the order in which the telephone number was entered into the system.
- **Phone Type** - The type of telephone number.
- **Phone Number** - The telephone number.
- **Extension** - The extension at the telephone number.
- **Contact Permission/Opt In** - The contact permission set for the telephone number.

Phone Detail Window

The Phone Detail Window is used to enter or update information for a Customer phone.

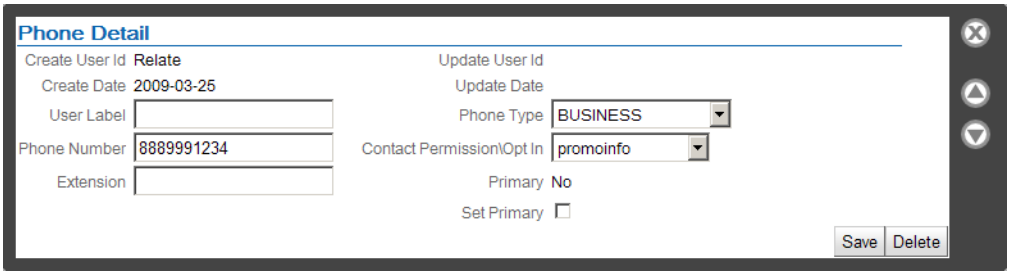


Figure 2-29: Phone Detail Window

The Phone Detail Window displays the following information:

- **Create User Id** - Employee ID of the user who created the telephone number. *This field cannot be edited.*
- **Create Date** - Date on which the telephone number was created. *This field cannot be edited.*
- **Update User Id** - Employee ID of the last user to update the telephone number. *This field cannot be edited.*
- **Update Date** - Last date on which the telephone number was created. *This field cannot be edited.*
- **User Label** - **[OPTIONAL]** User Label for the telephone number.
- **Phone Number** - **[REQUIRED]** The Customer's telephone number.
- **Extension** - **[OPTIONAL]** The Customer's extension at the given telephone number.
- **Phone Type** - **[REQUIRED]** The type of phone. Relate includes the following basic types:
  - **BUSINESS** - Business telephone number for the Customer.
  - **CELL** - Cell telephone number for the Customer.
  - **FAX** - Fax number for the Customer.

- **HOME** - Home telephone number for the Customer.

> *Depending upon the configuration of your system, you may have different or additional options.*

- **Contact Permission/Opt In** - **[OPTIONAL]** Determines the contact permission for the telephone number.
- **Primary** - Indicates whether the telephone number is the primary telephone number. *This field is edited through the Set Primary Check Box (see below).*
- **Set Primary** - Select this option to make the telephone number the primary telephone number for the Customer; this option is only available if the phone is not the primary telephone number.

Edit a Telephone Number

To edit an existing Telephone Number in a Customer record:

1. Click the Telephone Number to edit.

   The Telephone Number is opened in a Phone Detail Window.

2. Make changes to the Telephone Number.
3. Click **Save** to save the changes and close the Phone Detail Window.

   To close the Window without saving the changes, click the **X** () in the top-right corner of the Window.

Delete a Telephone Number

To delete a Telephone Number from a Customer record:

1. In the Telephone Number screen, click the Telephone Number to edit.

   The Telephone Number is opened in an Phone Detail Window.

2. Click **Delete** to delete the Telephone Number and close the Phone Detail Window.

> *Relate does not ask you to confirm that you want to delete the phone.* **Once you click the Delete button, the Telephone Number will be gone!**

To close the Window without deleting, click the **X** () in the top-right corner of the Window.

Email

The Email screen enables users to add, update, or delete email addresses associated with a Customer.

To access the Email screen, do one of the following:

- Click **EMAIL** in the Customer Actions Menu.
- Click the **edit** Link in the Email section of the Customer Dashboard.

The Email screen opens.

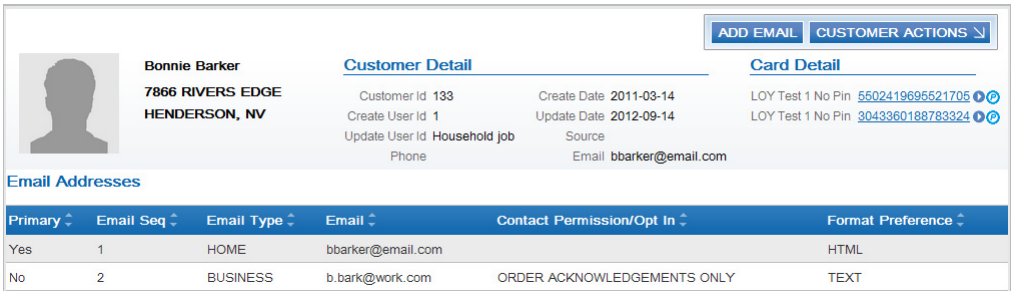


Figure 2-30: Email Screen

Email Screen

The Email screen contains the following information:

- The Customer Basics area.
- A List of email addresses containing the following information for each email address:
  - **Primary** - Indicates whether the email is the primary email address.
    - **Yes** - The email is the primary email address.
    - **No** - The email is not the primary email address.
  - **Email Seq** - The order in which the email was entered into the system.
  - **Email Type** - The type of email.
  - **Email** - The email address.
  - **Contact Permission/Opt In** - The contact permission set for the address.
  - **Format Preference** - The formatting used for the emails sent to the address.
    - **HTML** - HTML formatting
    - **TEXT** - Plain-text formatting

Email Detail Window

The Email Detail Window is used to enter or update information for a Customer email.

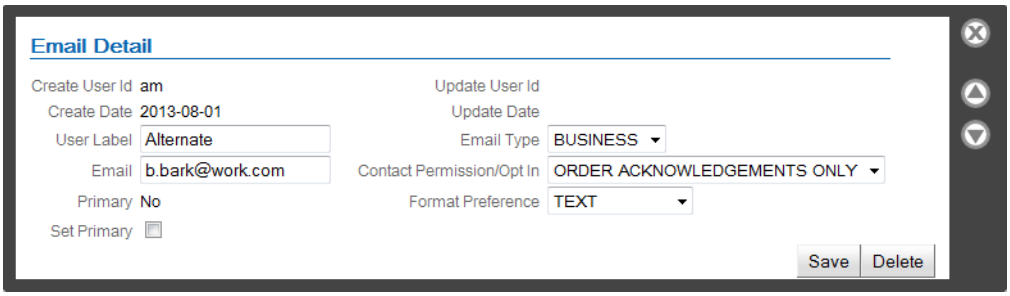


Figure 2-31: Email Detail Window

The Email Detail Window displays the following information:

- **Create User Id** - Employee ID of the user who created the email. *This field cannot be edited.*
- **Create Date** - Date on which the email was created. *This field cannot be edited.*
- **Update User Id** - Employee ID of the last user to update the email. *This field cannot be edited.*
- **Update Date** - Last date on which the email was updated. *This field cannot be edited.*
- **User Label** - **[OPTIONAL]** User Label for the email address.
- **Email** - **[REQUIRED]** The email address for the Customer.
- **Email Type** - **[REQUIRED]** The type of email. Relate includes the following basic types:
  - **BUSINESS** - Business email for the Customer.
  - **HOME** - Home email for the Customer.

> *Depending upon the configuration of your system, you may have different or additional options.*

- **Contact Permission/Opt In** - **[OPTIONAL]** Determines the contact permission for the email.
- **Format Preference** - Determines the formatting used for the emails sent to the address. This Selection Menu has the following options:
  - **HTML** - Use HTML formatting.
  - **TEXT** - Use plain-text formatting.
- **Primary** - Indicates whether the email is the primary email. *This field is edited through the Set Primary Check Box (see below).*
- **Set Primary** - Select this option to make the email the primary email for the Customer; this option is only available if the email is not the primary email.

Edit an Email Address

To edit an existing Email in a Customer record:

1. Click the Email to edit.

   The Email is opened in an Email Detail Window.

2. Make changes to the Email.
3. Click **Save** to save the changes and close the Email Detail Window.

   To close the Window without saving the changes, click the **X** () in the top-right corner of the Window.

Delete an Email Address

To delete an email from a Customer record:

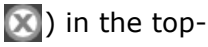
1. In the Email screen, click the Email to edit.

   The Email is opened in an Email Detail Window.

2. Click the **Delete** button to delete the email and close the Email Detail Window.



Relate does not ask you to confirm that you want to delete the email.
Once you click the Delete button, the email will be gone!

To close the Window without deleting, click the **X** () in the top-right corner of the Window.

Attributes

The Attributes screen enables users to add, update, or delete attributes associated with a Customer.

To access the Attributes screen, do one of the following:

- Click **ATTRIBUTES** in the Customer Actions Menu.
- Click the **edit** Link in the Customer Attributes section of the Customer Dashboard.

The Attributes screen opens.

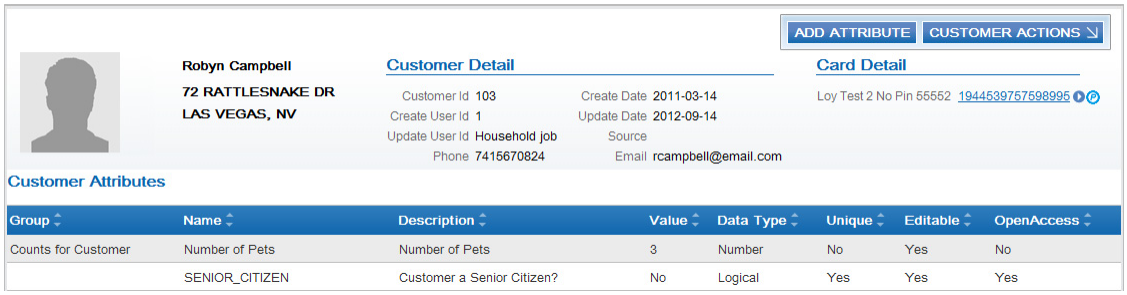


Figure 2-32: Attributes Screen

Attributes Screen

The Attributes Screen contains the following information:

- The Customer Basics area.
- A List of attributes containing the following information for each Attribute:
  - **Group** - The group associated with the Attribute.
  - **Name** - The name of the Attribute.
  - **Description** - A description of the Attribute.
  - **Value** - The value of the Attribute.
  - **Data Type** - The type of data contained in the Attribute value.
  - **Unique** - Indicates whether this Attribute can only be set once for each Customer.
    - **Yes** - This Attribute can only be set once for each Customer.
    - **No** - This Attribute can be set multiple times for each Customer.
  - **Editable** - Indicates the permissions required for a User to edit this Attribute value in a Customer record.
    - **Yes** - This Attribute can edited by any User with permission to edit Customer records.
    - **No** - This Attribute can only be edited by a User with system administration permissions.
  - **OpenAccess** - Indicates whether there is Open Access to this Attribute.
    - **Yes** - This Attribute has Open Access.
    - **No** - This Attribute does not have Open Access.

Attribute Detail Window

The Attribute Detail Window is used to enter or update information for a Customer attribute.

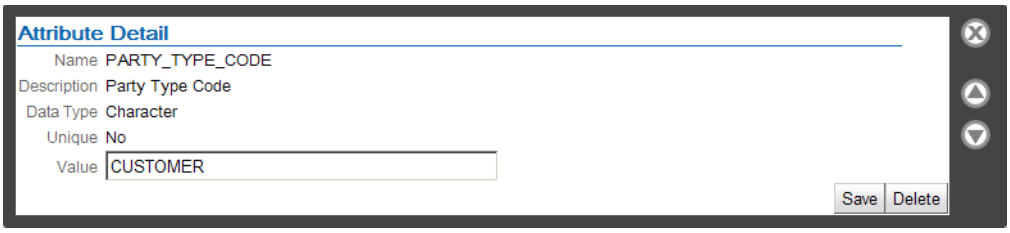


Figure 2-33: Attribute Detail Window

The Attribute Detail Window displays the following information:

- **Name** - The name of the Attribute.
- **Description** - A description of the Attribute.
- **Data Type** - The type of data stored in the Attribute.
- **Unique** - Indicates whether this Attribute can only be set once for each Customer.
  - **Yes** - This Attribute can only be set once for each Customer.
  - **No** - This Attribute can be set multiple times for each Customer.

The Attribute Detail Window contains the following field for editing:

- **Value** - **[REQUIRED]** The value for the attribute.

Edit an Attribute

To edit an existing Attribute in a Customer record:

1. Click the Attribute to edit.

   The Attribute is opened in an Attribute Detail Window.
2. Make changes to the Attribute.
3. Click **Save** to save the changes and close the Attribute Detail Window.

   To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

Delete an Attribute

To delete an attribute from a Customer record:

1. In the Attribute screen, click the Attribute to edit.

   The Attribute is opened in an Attribute Detail Window.

2. Click **Delete** to delete the Attribute and close the Attribute Detail Window.

> *Relate does not ask you to confirm that you want to delete the attribute.* **Once you click the Delete button, the Attribute will be gone!**

To close the Window without deleting, click the **X** ( ) in the top-right corner of the Window.

Transaction History

To view the Transaction History for Customer, users must open the Transaction History screen. Transaction History cannot be viewed on the Customer Dashboard.

To View a Customer's Transaction History, click **TRANSACTION HISTORY** in the Customer Actions Menu.

The Transaction History screen opens.

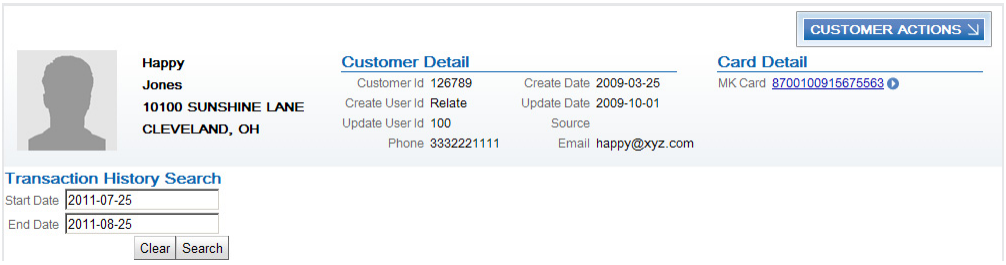


Figure 2-34: Transaction History Screen

Transaction History Screen

The Transaction History Screen contains the following information:

- The Customer Basics area.
- Date range search criteria entry fields.

After performing a Transaction History Lookup, a Transaction History Result List opens, displaying the following information for each transaction:

Transaction History Result

Location	Register	Business Date	Transaction	Cashier	Status	Total
99901	1	2014-07-30	11384004	100	DELIVERED	384.21
99901	1	2014-07-30	40995004	100	DELIVERED	384.21

Figure 2-35: Transaction History Result List

- **Location** - The location where the transaction was performed.
- **Register** - The register on which the transaction was performed.
- **Business Date** - The business date of the transaction.
- **Transaction** - The transaction number.
- **Cashier** - The Employee ID of the cashier who performed the transaction.
- **Status** - The status of the transaction.
- **Total** - The total amount of the transaction.

Transaction History Lookup

To look up the transaction history for a Customer:

1. Using the Calendar Menu for the **Start Date** field, select the beginning date of the date range to use for the transaction lookup.
2. Using the Calendar Menu for the **End Date** field, select the ending date of the date range to use for the transaction lookup.
3. Click the **Search** button.

   The Transaction History Result List displays all the transactions performed between the Start Date and End Date.
4. To view the Transaction Details for a transaction, click the transaction in the Transaction History Search.

   The transaction is opened in a Transaction Detail Window.
5. Click the **Clear** button to clear the Start Date field, the End Date field, and the Transaction History Result List.

Transaction History Result

Location	Register	Business Date	Transaction	Cashier	Status	Total
99901	1	2014-07-30	11384004	100	DELIVERED	384.21
99901	1	2014-07-30	40995004	100	DELIVERED	384.21

Figure 2-36: Transaction History Result List

Transaction Detail Window

The Transaction Detail Window displays detailed information about a transaction associated with a Customer record.

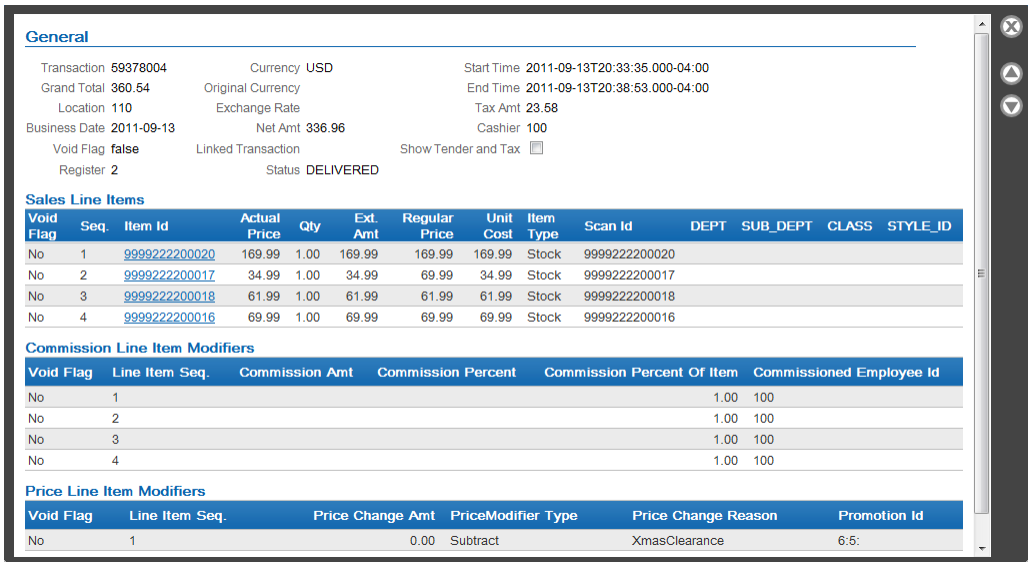


Figure 2-37: Transaction Detail Window

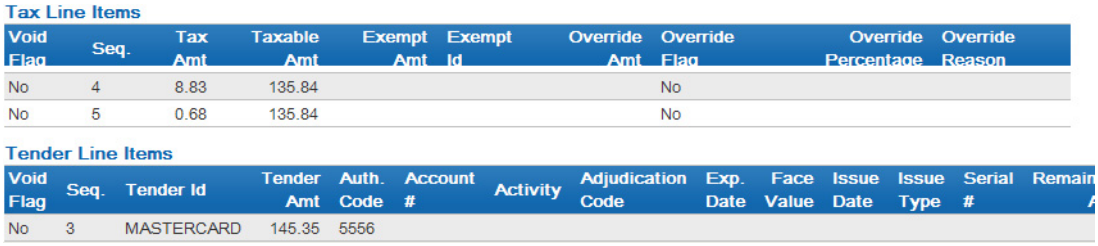
The Transaction Detail Window is divided into separate sections containing certain types of information. Each section of the Window is described below.

General

The general section contains the following information:

- **Transaction** - ID of the transaction.
- **Grand Total** - The total amount of the transaction.
- **Location** - ID of the location.
- **Business Date** - Business date of the transaction.
- **Void Flag** - Indicates whether the transaction was voided.
  - **Yes** - The transaction was voided.
  - **No** - The transaction was not voided.
- **Register** - ID of the register, within the location, used in the transaction.
- **Currency** - Currency Code of the currency in which the transaction is stored.
- **Original Currency** - Currency Code of the currency used in the transaction.
- **Exchange Rate** - Exchange rate used between the Currency and the Original Currency.
- **Net Amt** - The net amount of the transaction.
- **Linked Transaction** - Transaction ID of the transaction to which the current transaction is linked. For example, it may be the original transaction for the sale of an item returned in a return transaction, or the layaway setup transaction associated with a subsequent layaway payment transaction.

- **Status** - Current status of the transaction.
- **Start Time** - Time at which the transaction started.
- **End Time** - Time at which the transaction ended.
- **Tax Amt** - The amount of the tax applied to the transaction.
- **Cashier** - Employee ID for the cashier who performed the transaction.
- **Show Tender and Tax** - Check this item to display the Tax Line Items and Tender Line Items sections.



Tax Line Items

Void Flag	Seq.	Tax Amt	Taxable Amt	Exempt Amt	Exempt Id	Override Amt	Override Flag	Override Percentage	Override Reason
No	4	8.83	135.84				No		
No	5	0.68	135.84				No		

Tender Line Items

Void Flag	Seq.	Tender Id	Tender Amt	Auth. Code	Account #	Activity	Adjudication Code	Exp. Date	Face Value	Issue Date	Issue Type	Serial #	Remain
No	3	MASTERCARD	145.35	5556									

Figure 2-38: Tender Line Items and Tax Line Items

Transaction Attributes

The Transaction Attributes section contains a List of Attributes assigned to the transaction. The following information is displayed for each Attribute:

- **Code** - The name/code of the Attribute.
- **Value** - The value for the Attribute.

Sales Line Items

The Sales Line Items section contains a List of line items processed in the transaction. The following information is displayed for each line item:

- **Void Flag** - Indicates whether the line item was voided.
  - **Yes** - The line item was voided.
  - **No** - The line item was not voided.
- **Seq.** - The order in which the line item was added to the transaction.
- **Item Id** - Item ID for the item in the transaction.

  The Item ID also acts as a Link to more information about the Item. Click the Item ID to open an Item Details Window containing more information about the item.
- **Actual Price** - The actual price for the item.
- **Qty** - The number of this item sold/returned.
- **Ext. Amt** - The extended amount of the item.
- **Regular Price** - The regular price of the item.
- **Unit Cost** - The unit cost of the item.
- **Item Type** - The type of item.
- **Scan Id** - The Scan ID for the item.

- **Dept.** - The Department ID to which the item belongs.
- **Sub Dept.** - The Subdepartment ID to which the item belongs.
- **Class** - The Class ID to which the item belongs.
- **Style** - The Style ID to which the item belongs.

Item Details Window

The Item Details Window displays the following information for an Item:

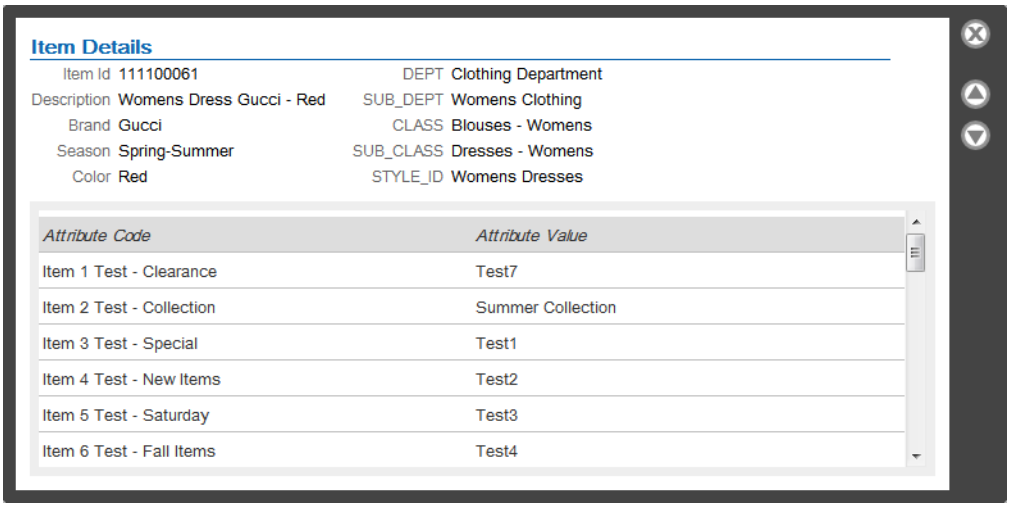


Figure 2-39: Item Details Window

- **Item Id** - Item ID for the Item.
- **Description** - Description of the Item.
- **Brand** - Brand of the Item.
- **Season** - Season for the Item.
- **Color** - Color of the Item.
- **Item Hierarchy** - Names of the Item Hierarchy levels and the levels to which the Item belongs.
- **Item Attributes** - The Attributes associated with the Item. The following information is displayed for each Attribute:
  - **Attribute Code** - Name of the Attribute.
  - **Attribute Value** - Value set for the Attribute.

Commission Line Item Modifiers

The Commission Line Item Modifiers section contains a List of commissions for each item in the transaction. The following information is displayed for each commission:

- **Void Flag** - Indicates whether the line item was voided.
  - **Yes** - The line item was voided.
  - **No** - The line item was not voided.

- **Line Item Seq.** - The order in which the line item was added to the transaction.
- **Commission Amt** - The amount of the commission.
- **Commission Percent** - The percentage of the total amount of commission paid for the transaction.
- **Commission Percent Of Item** - The percent of the item amount that is paid in commission.
- **Commissioned Employee Id** - Unique ID for the employee receiving the commission.

Price Line Item Modifiers

The Price Line Item Modifiers section contains a List of price modifications that were made to any line items (listed in the Sales Line Items section) in the transaction. The following information is displayed for each line item modifier:

- **Void Flag** - Indicates whether the line item modification was voided.
  - **Yes** - The modification was voided.
  - **No** - The modification was not voided.
- **Line Item Seq.** - Sequence number of the line item that is being modified.
- **Price Change Amt** - If the modification is an amount off of the price, the amount taken off of the price.
- **PriceModifier Type** - Type code for the price modifier.
- **Price Change Reason** - Reason code for the price change.
- **Promotion ID** - Unique ID for the Promotion applied to the line item.

Tax Line Items

The Tax Line Items section contains a List of taxes associated with the transaction. The following information is displayed for each tax line item:



This section is displayed only if the Show Tender and Tax Check Box is checked.

- **Void Flag** - Indicates whether the line item was voided.
  - **Yes** - The line item was voided.
  - **No** - The line item was not voided.
- **Seq.** - The order in which the line item was added to the transaction.
- **Tax Amt** - The amount of the tax.
- **Taxable Amt** - The amount to which the tax was applied.
- **Exempt Amt** - The amount of the transaction that was exempted from tax.
- **Exempt Id** - The ID of the tax exemption certificate.
- **Override Amt** - The amount of the tax override, if the Override Flag is "Yes".

- **Override Flag** - Indicates whether the tax was overridden.
  - **Yes** - The tax was overridden.
  - **No** - The tax was not overridden.
- **Override Percentage** - The percentage of the tax that was overridden.
- **Override Reason** - The reason given for the tax override.

Tender Line Items

The Tender Line Items section displays a List of tenders used in the transaction. The following information is displayed for each tender line item:



This section is displayed only if the Show Tender and Tax Check Box is checked.

- **Void Flag** - Indicates whether the line item was voided.
  - **Yes** - The line item was voided.
  - **No** - The line item was not voided.
- **Seq.** - The order in which the line item was added to the transaction.
- **Tender Id** - Tender ID of the tender used.
- **Tender Amt** - Amount applied to the tender.
- **Auth. Code** - The authorization code for the tender.
- **Account #** - The account number of the tender.
- **Activity** - The activity for the tender.
- **Adjudication Code** - The adjudication code for the tender.
- **Exp. Date** - The expiration date of the tender.
- **Face Value** - The face value of the tender (e.g. gift cards).
- **Issue Date** - The issue date of the tender.
- **Issue Type** - The issue type of the tender.
- **Serial #** - The serial number for the tender.
- **Remaining Amt** - The remaining amount of the tender (e.g. gift cards).

Card Association

The Card Association screen enables users to associate Cards to, or disassociate Cards from a Customer, as well as determine which Customer is the primary holder of a Card.

To access the Card Association screen, click **CARD ASSOCIATION** in the Customer Actions Menu. The Card Association screen opens.

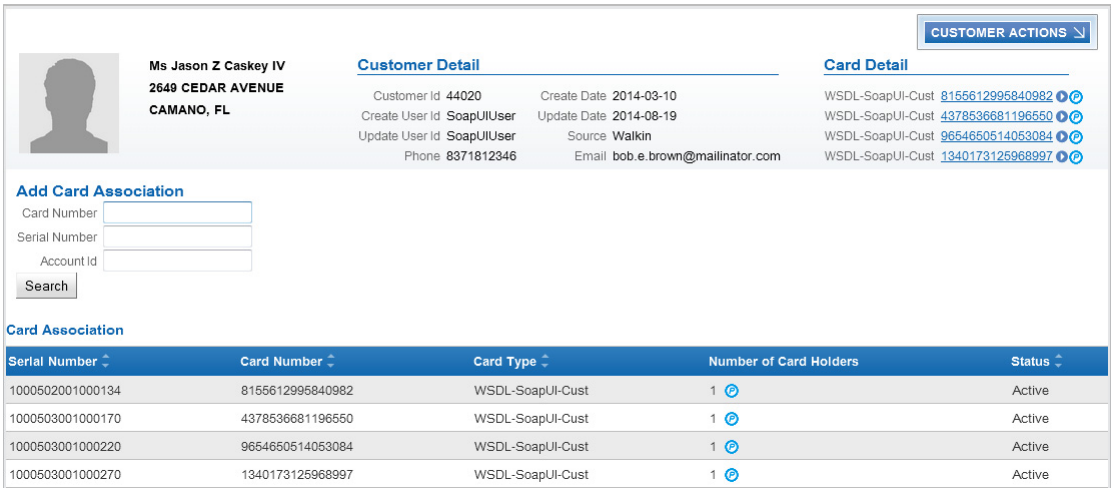


Figure 2-40: Card Association Screen

Card Association Screen

The Card Association Screen contains the following information:

- The Customer Basics area.
- Card Search criteria, containing the following fields:
  - **Card Number** - Card Number for the Card.
  - **Serial Number** - Serial Number for the Card.
  - **Account Id** - ID of the account associated with the Card.
- A List of Cards associated with the Customer, containing the following information for each Card:
  - **Serial Number** - The Serial Number for the Card.
  - **Card Number** - The Card Number for the Card.
  - **Card Type** - The type of Card.
  - **Number of Card Holders** - The number of Customers assigned to the Card. If the primary cardholder icon (Ⓟ) is displayed in this column, the current Customer is the primary cardholder.
  - **Status** - The current status of the Card.

Card Detail Window

The Card Detail Window displays information about a Card and allows users to Associate a Card With a Customer or Disassociate a Card From a Customer.

To open a Card in a Card Detail Window, perform the procedure "Card Search" on page 112.

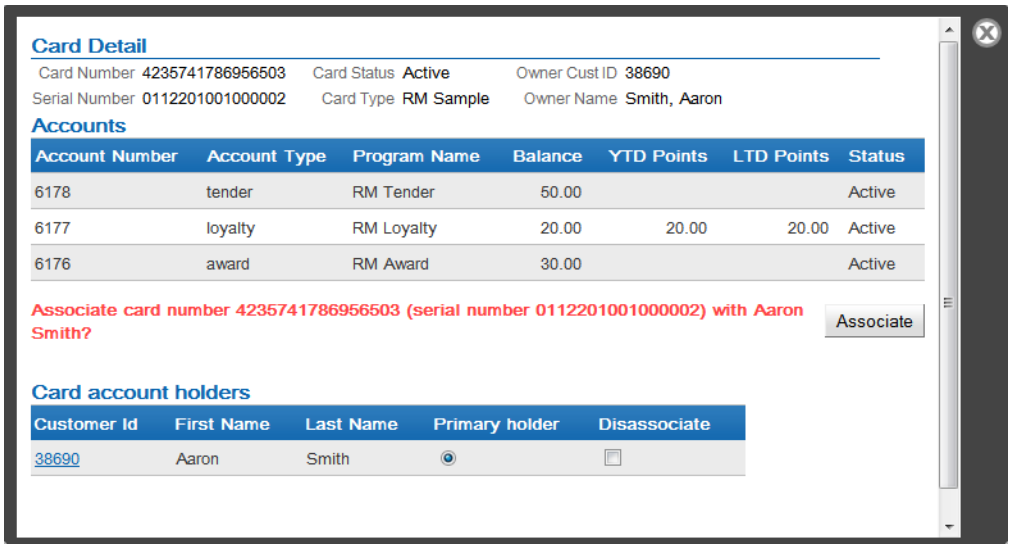


Figure 2-41: Card Detail Window

The Card Detail Window displays the following information:

- **Card Number** - Card number for the Card.
- **Serial Number** - Serial number for the Card.
- **Card Status** - Current status of the Card.
- **Card Type** - Type of Card.
- **Owner Cust ID** - Customer ID of the Customer with whom the Card is associated.
- **Owner Name** - Name of the Customer with whom the Card is associated.
- **Accounts List** - Displays a List of accounts attached to the Card. The following information is displayed for each account in the List:
  - **Account Number** - Account Number identifying the account.
  - **Account Type** - Type of account.
  - **Program Name** - The name of the program to which the account belongs.
  - **Balance** - The balance on the account.
  - **YTD Points** - The year-to-date number of points for the loyalty account.
  - **LTD Points** - The lifetime-to-date number of points for the loyalty account.
  - **Status** - The current status of the account.
- **Card account holders** - Displays a List of Customers associated with the Card. The following information is displayed for each Customer in the List:
  - **Customer Id** - ID of the Customer.

- **First Name** - Customer first name.
- **Last Name** - Customer last name.
- **Primary holder** - Radio Buttons indicating which Customer is the primary Customer for the Card.
- **Disassociate** - Used to disassociate the Customer from a Card (see "Disassociate a Card From a Customer" on page 114).

The Card Detail Window will also have the following button:

- **Associate** - If the **Associate** button is clicked, the Card will be associated with the current Customer (see "Associate a Card With a Customer" on page 113).

Card Search

To search for a Card through the Card Association screen:

1. Enter search criteria into one of the following fields:
   - **Card Number** - The Card Number for the Card.
   - **Serial Number** - The Serial Number for the Card.
   - **Account ID** - The Account ID of an account associated with the Card.

> *If information is entered in more than one field, the data in each field must be for the same Card. If the data is associated with different Cards, no Cards will be returned by the search.*

2. Click **Search**.
   - If a Card matching the search criteria is found, the Card will be opened in the Card Detail Window.

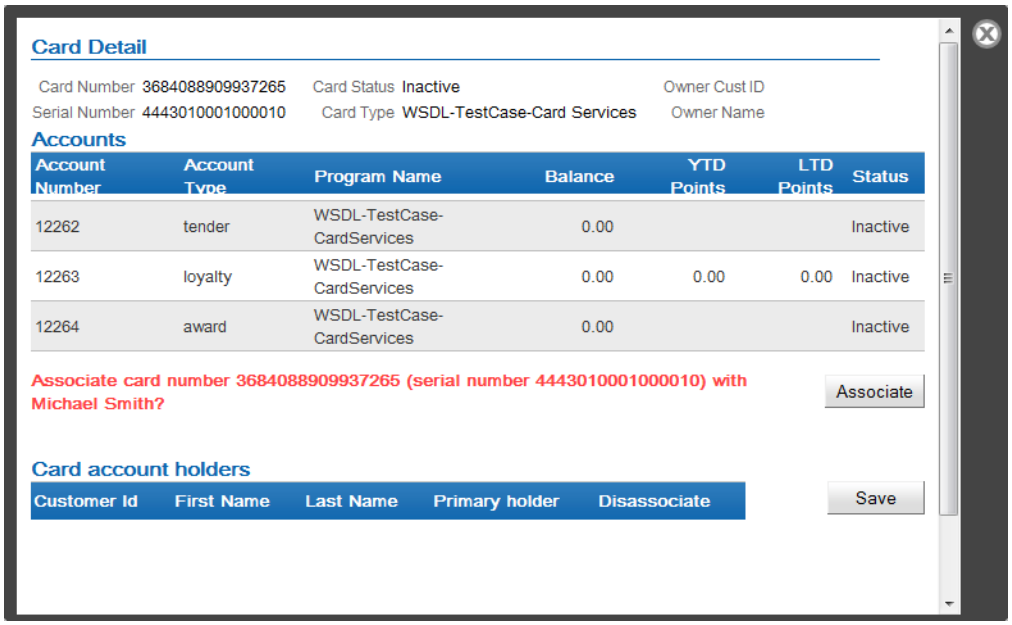


Figure 2-42: Card Detail Window

- If no Card is found that matches the search criteria, an error message will be displayed at the top of the screen.

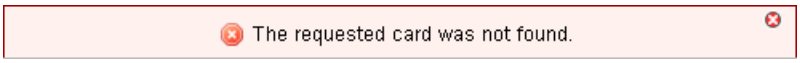


Figure 2-43: Requested Card Not Found Error

Associate a Card With a Customer

To associate a Card with a Customer:

1. Perform a Card Search for the Card you are associating with the Customer.

   The Card is opened in a Card Detail Window.

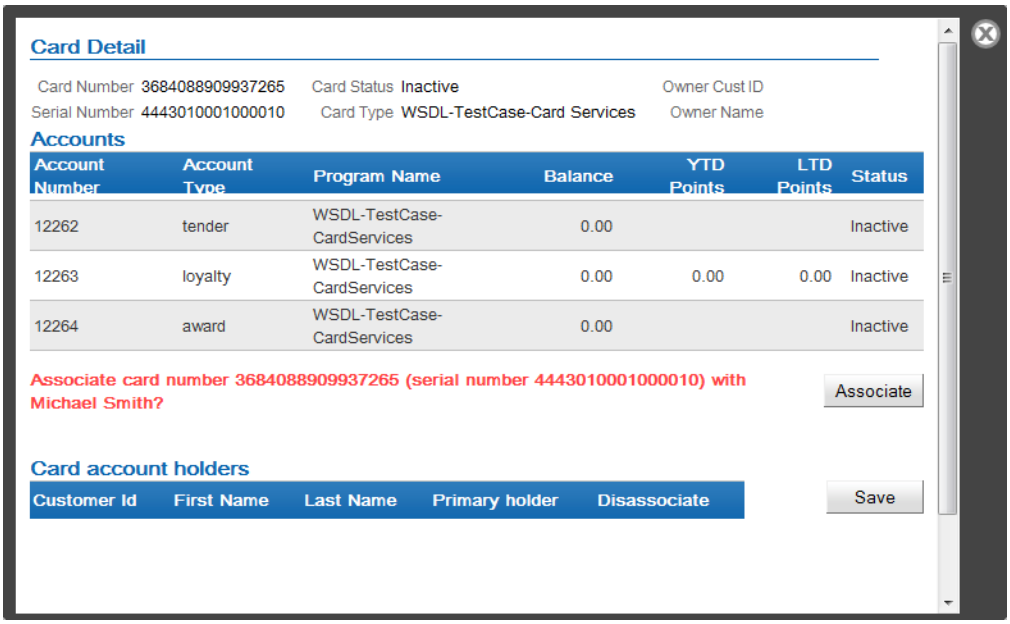


Figure 2-44: Card Detail Window

2. Click the **Associate** button.

   The Card appears in the Card account holders List.

3. Use the **Primary Holder** Radio Buttons to select the Customer to assign as the primary cardholder.

> *If no other Customer is assigned to the Card, the newly assigned Customer will be the primary cardholder.*

4. Click the **Save** button to save the changes and close the Window.

A confirmation prompt opens. Continue with the next step.

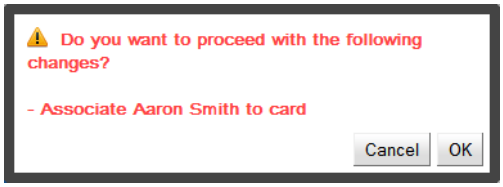


Figure 2-45: Associate Card Confirmation Prompt

To close the Window without saving changes, click the **X** ( ) in the top-right corner; the procedure is complete.

5. In the confirmation prompt, click **OK** to confirm the change(s) and close the Window, or click **Cancel** to return to the Window.

Disassociate a Card From a Customer

To disassociate a Card from a Customer:

1. In the Card Association screen for a Customer currently associated with the Card, click the Card to be disassociated from the Customer.

   The Card is opened in a Card Detail Window.

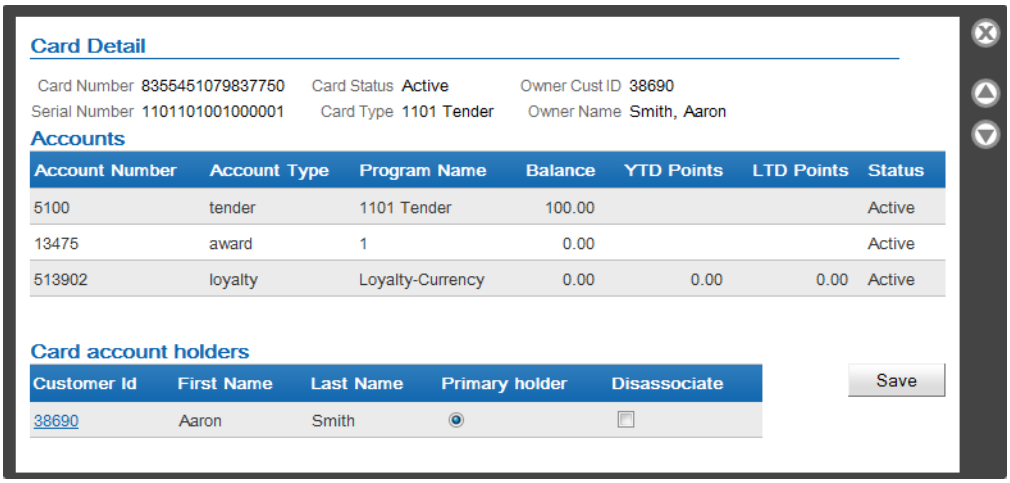


Figure 2-46: Card Detail Window

2. For the Customer to dissociate from the Card, click the **Disassociate** Check Box to enter a check mark ( ) in it.
3. Click the **Save** button.

A confirmation prompt opens.

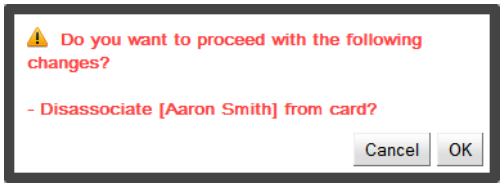


Figure 2-47: Disassociate Card Confirmation Prompt

To return to the Card Detail Window without saving the change, click **Cancel**.

4. In the confirmation prompt, click **OK** to confirm the Card disassociation and close the Window. The Card is disassociated from the Customer and the Card Detail Window closes. The Card is removed from the Customer's Cards/Accounts List.

Change Primary Cardholder

To change the primary cardholder for a Card:

1. In the Card Association screen for a Customer currently associated with the Card, click the Card that is being changed.

   The Card opens in a Card Detail Window.

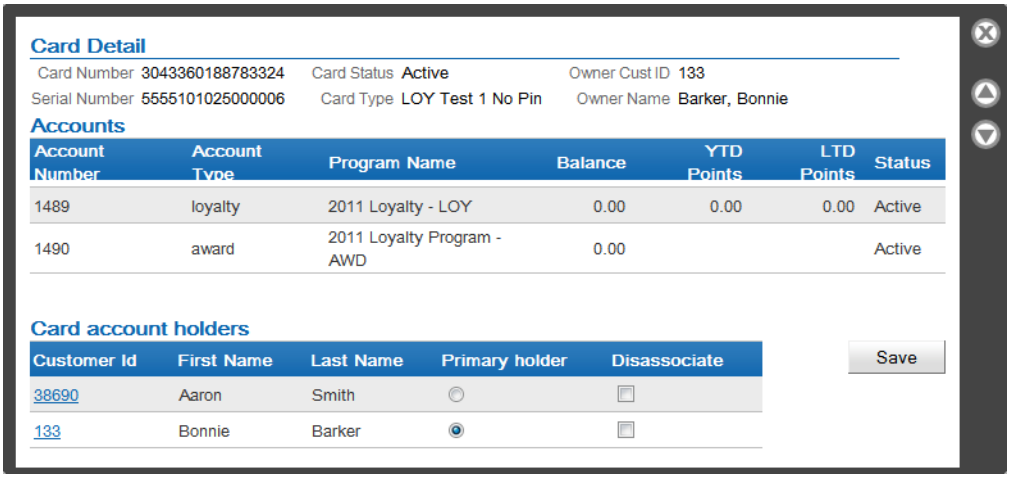


Figure 2-48: Card Detail Window

2. Use the **Primary holder** Radio Buttons to select the Customer to set as the primary cardholder.
3. Click the **Save** button.

A confirmation prompt opens.

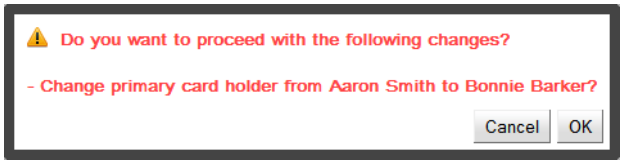


Figure 2-49: Change Primary Cardholder Confirmation Prompt

To return to the Card Detail Window without saving the change, click **Cancel**.

4. In the confirmation prompt, click **OK** to confirm the primary cardholder change and close the Window. The primary cardholder changes and the Card Detail Window closes.

Alternate Keys

The Alternate Key screen enables users to add, update, or delete Alternate Keys associated with a Customer.

To access the Alternate Key screen, do one of the following:

- ❑ Click **ALTERNATE KEY** in the Customer Actions Menu.
- ❑ Click the **edit** Link in the Alternate Key section of the Customer Dashboard.

The Alternate Keys screen opens.

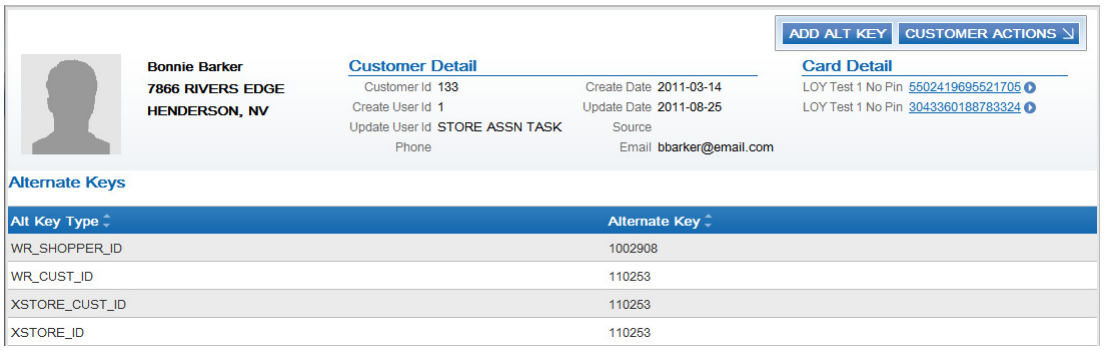


Figure 2-50: Alternate Key Screen

Alternate Keys Screen

The Alternate Keys Screen contains the following information:

- The Customer Basics area.
- A List of Alternate Keys containing the following information for each Alternate Key:
  - ❑ **Alt Key Type** - The type of Alternate Key.
  - ❑ **Alternate Key** - The value of the Alternate Key.

Alt Key Detail Window

The Alt Key Detail Window is used to view details about a Customer Alternate Key.

To open an Alternate Key in an Alt Key Detail Window, click the Alternate Key in the Alternate Keys List.

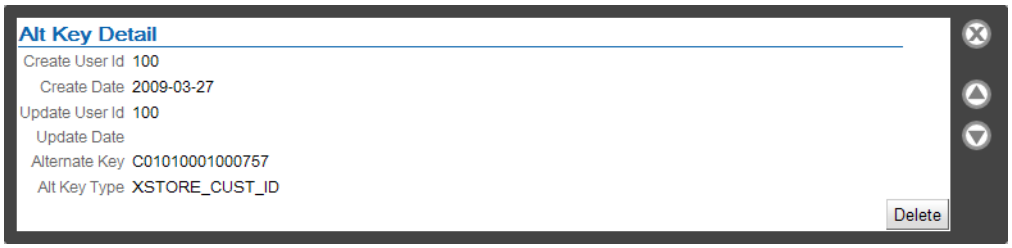


Figure 2-51: Alt Key Detail Window

The Alt Key Detail Window displays the following information:

- **Create User Id** - Employee ID of the user who created the Alternate Key.
- **Create Date** - Date on which the Alternate Key was created.
- **Update User Id** - Employee ID of the last user to update the Alternate Key.
- **Update Date** - Last date on which the Alternate Key was updated.
- **Alternate Key** - The value of the Alternate Key.
- **Alt Key Type** - The type of Alternate Key.

Add an Alt Key

To add an Alternate Key to a Customer record:

1. In the Alternate Keys screen, click the **Add Alt Key** button in the top-right corner of the screen.
2. An Alt Key Detail Window opens.

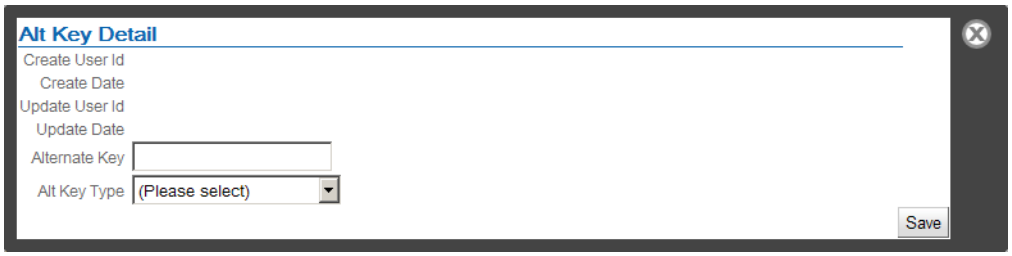


Figure 2-52: Alternate Key Detail Window

3. Enter the Alternate Key value in the **Alternate Key** field.
4. Select the Alternate Key type in the **Alt Key Type** Selection Menu.
5. Click the **Save** button.

   The Alternate Key is added to the Alternate Key List and the Alt Key Detail Window closes.

Delete an Alt Key

To delete an Alternate Key from a Customer record:

1. In the Alternate Keys screen, click the Alternate Key to delete.

   The Alternate Key is opened in an Alt Key Detail Window.

2. Click the **Delete** button to delete the Alternate Key and close the Alt Key Detail Window.

> *Relate does not ask you to confirm that you want to delete the Alternate Key.* **Once you click the Delete button, the Alternate Key will be gone!**

To close the Window without deleting, click the **X** ( ) in the top-right corner of the Window.

Customer Notes

The Customer Notes screen allows Users to view and add Customer Notes.

To access the Customer Notes screen, click **NOTES** in the Customer Actions Menu. The Customer Notes screen opens.

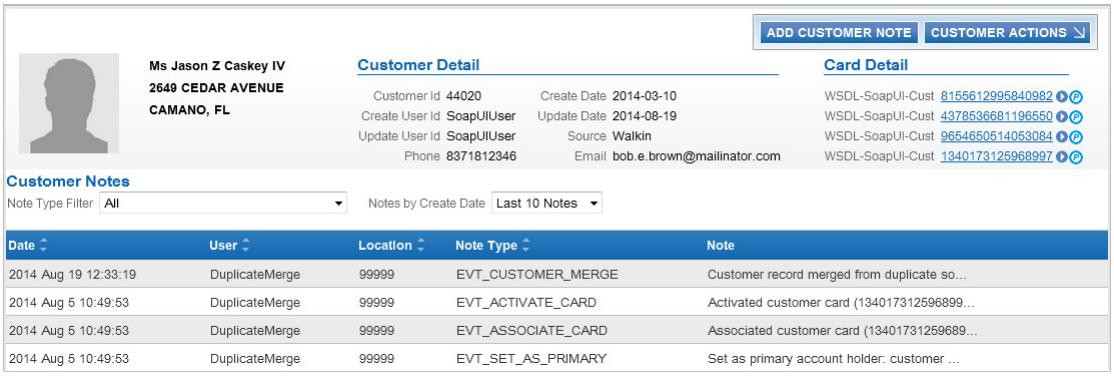


Figure 2-53: Customer Notes Screen

Customer Notes Screen

The Customer Notes Screen includes the following information:

- The Customer Basics area.
- Customer Notes Filter menus:
  - **Note Type Filter** - The type of Note.

    The values in this Selection Menu are determined by configuration.

> **See also:** The *Relate Configuration Guide* for more information.

- **Notes by Create Date** - The time within which the Note was created.

  This Selection Menu has the following values:

  - **Last 10 Notes** - **[DEFAULT]** Display the last 10 Notes created.
  - **Last 30 Days** - Display the Notes created within the last 30 days.
  - **Last 60 Days** - Display the Notes created within the last 60 days.
  - **Last 120 Days** - Display the Notes created within the last 120 days.
  - **Last Year** - Display the Notes created within the last year.
  - **All** - Display all Notes for the Customer.

- A List of Customer notes containing the following information for each Customer note:
  - **Date** - The date on which the note was created.
  - **User** - The ID of the user who created the record.
  - **Location** - The ID of the location where the note was created.
  - **Note Type** - The type of note.
  - **Note** - The content of the note.

Add a Customer Note

To add a Customer Note to a Customer record:

1. Click the **ADD CUSTOMER NOTE** button in the top-right corner.

   The Add Customer Note Window opens.

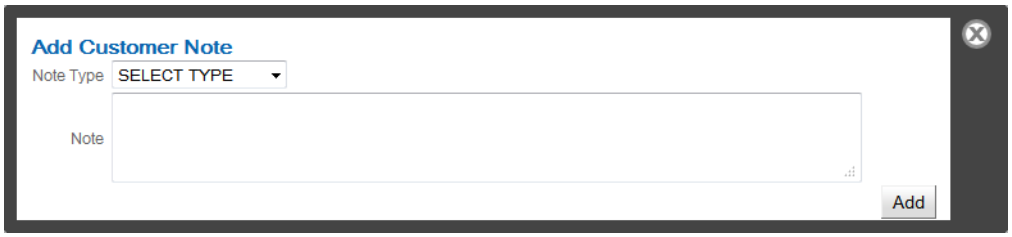


Figure 2-54: Add Customer Note Window

2. Select the **Note Type** in the Selection Menu.
3. In the **Note** Text Field, enter the text of the note.
4. Click the **Add** button.

   The Add Customer Note Window closes and the Note is added to the Customer Notes List.

Promotion History

A Customer's Promotion History shows all of the Promotions that have been available to a Customer, and whether the Customer responded to the Promotion by making purchases. To view the Promotion History for Customer, users must open the Promotion History screen. Promotion History cannot be viewed on the Customer Dashboard.

To open the Promotion History screen, click **PROMOTION HISTORY** in the Customer Actions Menu. The Promotion History Screen opens, providing access to the Promotion History Search functionality.

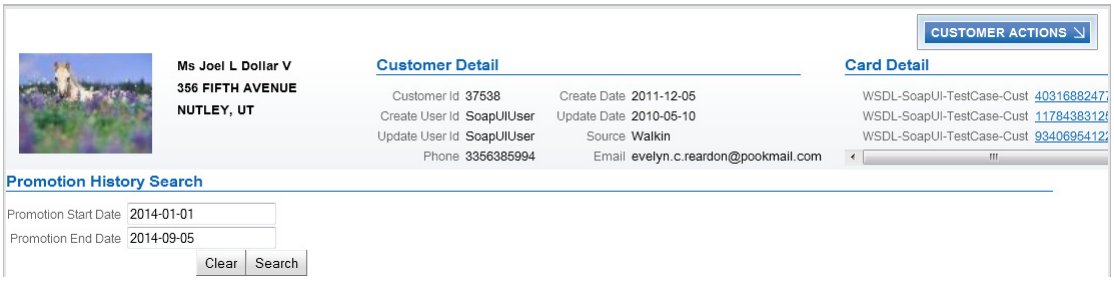


Figure 2-55: Promotion History Screen

Promotion History Search

To search for a Customer's Promotion History:

1. In the **Promotion Start Date** Calendar Menu, select the first date of the date range for the Promotion History.
2. In the **Promotion End Date** Calendar Menu, select the final date of the date range for the Promotion History.
3. Click the **Search** button.

   The Promotion History search is performed and the results displayed in the Promotion History Screen.

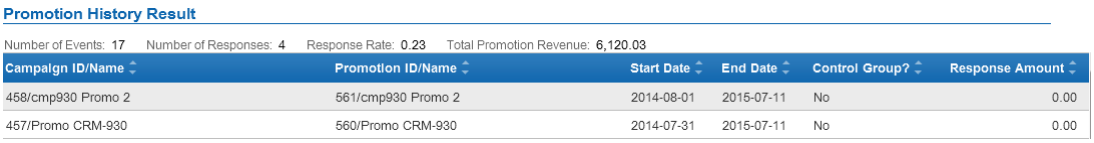


Figure 2-56: Promotion History Search Results

Promotion History Screen

The Promotion History Screen includes the following fields:

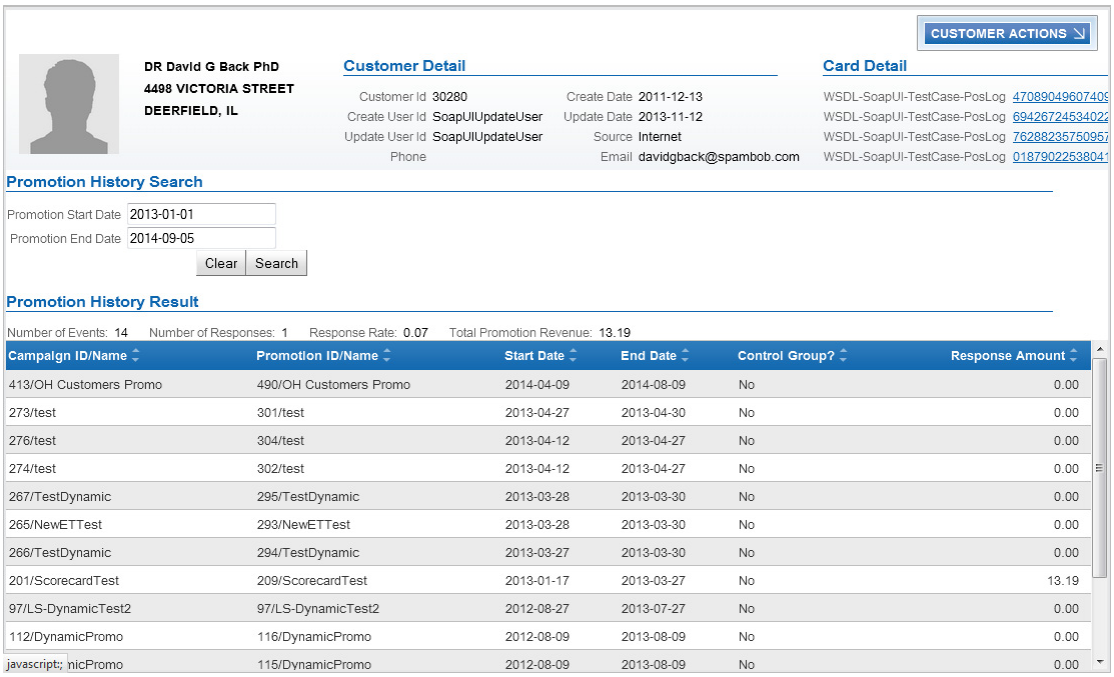


Figure 2-57: Promotion History Screen With Search Results

- The Customer Basics area.
- A Promotion History Search area containing the following fields:

> *The search results will display any Promotion that has an active date anytime within the date range entered.*

  - **Promotion Start Date** - A Calendar Menu defining the beginning date of a Promotion History Search's date range.
  - **Promotion End Date** - A Calendar Menu defining the ending date of a Promotion History Search's date range.

After performing a Promotion History Search, the Promotion History Screen includes the following information:

- A Promotion History Result List containing the following fields:
  - **Number of Events** - The number of Promotion events that have been available to the Customer within the date range of the search.
  - **Number of Responses** - The number of Promotions to which the Customer has responded within the data range of the search.
  - **Response Rate** - The percentage of available Promotions to which the Customer responded.

- **Total Promotion Revenue** - The total revenue received from Customer responses to Promotions.
- A List of the Promotions that have been available to the Customer within the date range. The following information is displayed for each Promotion:

> *The number of Promotions displayed in the List depends upon a Relate configuration.*
>
> **See also:** The *Relate Configuration Guide* for more information.

  - **Campaign ID/Name** - ID of the Campaign to which the Promotion belongs.
  - **Promotion ID/Name** - ID of the Promotion.
  - **Start Date** - Start Date of the Promotion.
  - **End Date** - End Date of the Promotion.
  - **Control Group?** - Indicates whether the Customer was part of a Control Group.
  - **Response Amount** - Indicates how much revenue was received from the Customer's response to the Promotion.

Customer Merge

Customer Merges combine multiple Customer records into one, new Customer record. This new Customer record includes the Transaction, Card, and Account information from all the merged Customer records. Other Customer data—addresses, email addresses, phone numbers, etc.—are taken from a single source record selected during the Customer Merge process.

Customer Merges can be performed directly through Customer records. This allows users to search for and merge Customer records directly, rather than through Duplicate Search and Duplicate Merge jobs. This not only allows Customer records to be merged immediately, but also allows users to merge Customer duplicates that may not be found by a Duplicate Search job.

To open the Customer Merge screen, click **MERGE** in the Customer Actions Menu. The Customer Merge Screen opens.



Figure 2-58: Customer Merge Screen

Customer Merge Screen

The Customer Merge screen contains the following information:

- The Customer Basics area.
- A Duplicates List of Customer records to be merged. The following information is displayed for each Customer:
  - **Make Source** - These Radio Buttons determine the Customer record into which all the Customers in the List will be merged.
  - **ID** - Unique ID of the Customer.
  - **Name** - Name of the Customer.
  - **Address** - Address Line 1 of the Customer's Primary Address.
  - **City** - City of the Customer's Primary Address.
  - **State** - State for the Customer's Primary Address.
  - **Postal Code** - Postal Code/ZIP Code for the Customer's Primary Address.
  - **Phone** - Primary telephone number for the Customer.
  - **Email** - Primary email address for the Customer.

Add Customer to Merge List

To add a Customer to the Merge List:

1. Click the **ADD DUPLICATE** button on the top right of the Customer Merge Screen.

   A Build Duplicate Customer List Window opens.

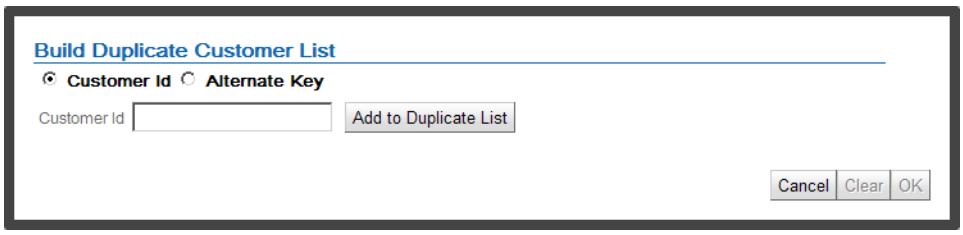


Figure 2-59: Build Duplicate Customer List

2. Use the Radio Buttons to select the method to use when searching for Customers.
   - If **Customer Id** is selected, continue with step 3.
   - If **Alternate Key** is selected, continue with step 4.
3. Enter the **Customer Id** for the Customer to add to the List.

   Continue with step 6.

4. In the **Alt Key Type** Selection Menu, select the Alternate Key to use for the search.

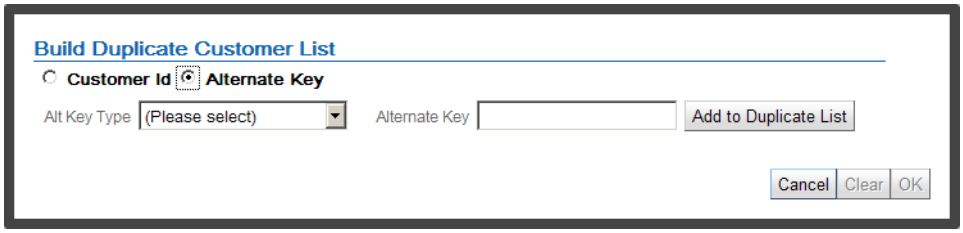


Figure 2-60: Alternate Key Search

5. In the **Alternate Key** field, enter the value to search for in the Alternate Key.
6. Click **Add to Duplicate List**.

   A Duplicate Customer List opens, displaying all the Customers matching the search criteria.

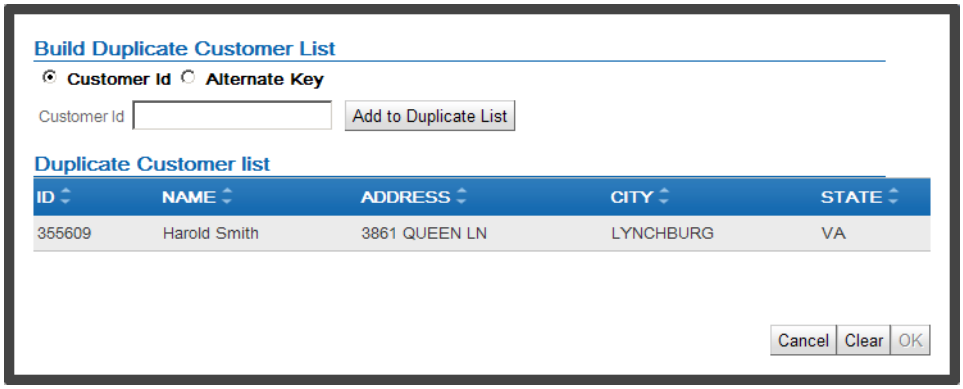


Figure 2-61: Duplicate Customer List

   The following information is displayed for each Customer:

   - **ID** - Unique ID of the Customer.
   - **Name** - Name of the Customer.
   - **Address** - Address Line 1 of the Customer's Primary Address.
   - **City** - City of the Customer's Primary Address.
   - **State** - State for the Customer's Primary Address.

7. Click the Customer to be added to the Duplicates List.

   If the Customer to be merged was not found by the search, click **Clear** to clear the Duplicate Customer List and return to step 2.

8. Click **OK** to close the Build Duplicate Customer List Window and add the selected Customer to the Duplicates List, or click **Cancel** to close the Window without making any changes.

Delete Customer from Merge List

To delete a Customer from a Merge List:

1. In the Duplicates List, click the Customer to delete.

> *The first Customer in the List cannot be removed.*

A **Delete** Link opens. Delete

2. Click **Delete**.

The Customer is removed from the Duplicates List.

Merge Customers

After the Customer Merge List has been completed through the Add Customer to Merge List and Delete Customer from Merge List procedures, the Customers can be merged.

Duplicates

Make Source	ID	Name	Address	City	State	Postal Code	Phone	Email
◉	310751	Harry Smith	3861 QUEENS LANE	LYNCHBURG	VA	24504	4348459905	harryfsmith@trashymail.com
○	355609	Harold Smith	3861 QUEEN LN	LYNCHBURG	VA	24504		

Figure 2-62: Duplicates to Be Merged

To merge the Customers entered into the Duplicates List:

1. Using the **Make Source** Radio Buttons, select the Customer record to use as the source for all Customer data.
2. Click the **MERGE DUPLICATES** button in the upper right of the Customer Merge Screen.

A confirmation prompt opens.

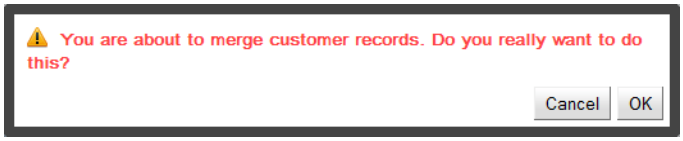


Figure 2-63: Merge Customers Confirmation Prompt

To return to the Customer Merge Screen without performing the merge, click the **Cancel** button.

3. Click **OK** to perform the merge.

Relate displays a confirmation message and the new Customer record opens in the Customer Dashboard.

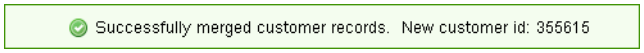


Figure 2-64: Successful Customer Merge Message

Security Groups

Security Groups determine whether Users can access and/or modify Customer information in that Security Group. Each Security Group is assigned a certain permission level for the Customers in that group. Each User assigned to a Security Group is assigned the permissions for that Security Group.

To open the Security Groups screen, click **SECURITY GROUP** in the Customer Actions Menu. The Security Groups Screen opens.

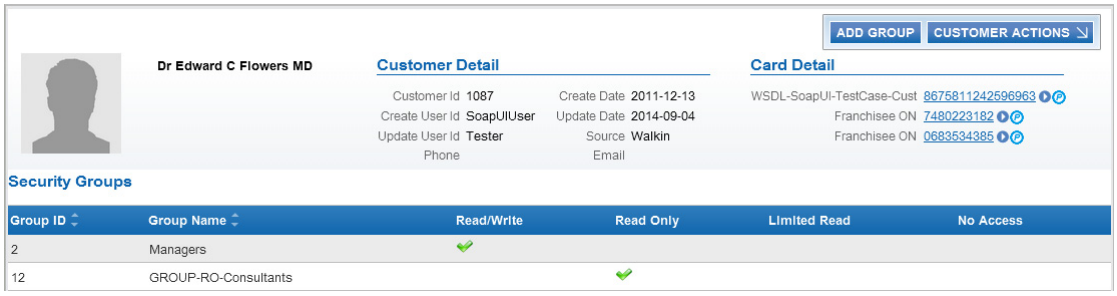


Figure 2-65: Security Groups Screen

Security Group Rules

Security Groups are used to determine the information that Users can access for specific Customers.

- If a Security Group has been applied to a Customer, and a User is a member of that Security Group, the User can access the information that is permitted by the Security Group's privilege level.
- If any Security Group is applied to a Customer, Users who are not part of that Security Group will see that the Customer exists, but will not have access to sensitive information about that Customer (such as Addresses, Telephone Numbers, or Email addresses). This is the Limited Read privilege level.
- If two or more Security Groups have been applied to a Customer, and a User belongs to two or more of those Security Groups, the User will have the **most permissible** privilege level given by those Security Groups.
- If no Security Group has been applied to a Customer, all Users will have full access to read and update the Customer's information.
- The owner of a Customer record will always have full read/write access to that Customer's information. See "Customer Information" on page 89 for more information about Customer record owners.

See also: The *Relate Configuration Guide* for more information and procedures for managing Users in Security Groups.

Security Group Privilege Types

Security Groups have the following privilege types available, listed in order from most permissible to least:

- **Read/Write** - Users in the Security Group can read and update all data for Customers who have had the Security Group applied.
- **Read Only** - Users in the Security Group can read all data for Customers who have had the Security Group applied, but cannot make updates.
- **Limited Read** - Users in the Security Group can read some data for Customers who have had the Security Group applied, but cannot read sensitive Customer information (such as Address, Telephone Numbers, and Email Addresses) and cannot make updates.
- **No Access** - A User in the Security Group will not even see that the Customer exists in the system.

Security Groups Screen

The Security Groups Screen contains the following information:

- The Customer Basics area.
- A List of Security Groups assigned to the Customer, containing the following information for each Security Group:
  - **Group ID** - ID of the Security Group.
  - **Group Name** - Name of the Security Group.
  - **Read/Write** - Indicates whether the Users in the Security Group are assigned the Read/Write privilege level for this Customer.
  - **Read Only** - Indicates whether the Users in the Security Group are assigned the Read Only privilege level for this Customer.
  - **Limited Read** - Indicates whether the Users in the Security Group are assigned the Limited Read privilege level for this Customer.
  - **No Access** - Indicates whether the Users in the Security Group are assigned the No Access privilege level for this Customer.

Security Group Detail Window

To open a Security Group assignment in a Security Group Detail Window, click the Security Group in the Security Groups Screen. The Security Group Detail Window opens.

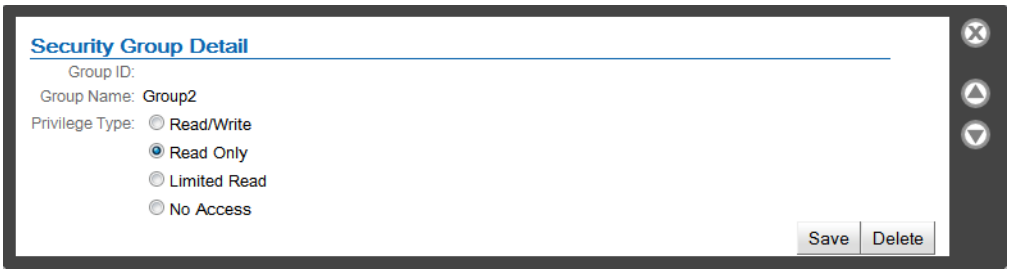


Figure 2-66: Security Group Detail Window

The following information is displayed:

- **Group ID** - ID of the Security Group.
- **Group Name** - Name of the Security Group.
- **Privilege Type** - Radio Buttons that determine the access privileges given to Users in the Security Group. These access privileges are specific to the Customer. For a description of the Radio Buttons, see "Security Group Privilege Types" on page 127.

Assign a Security Group to a Customer

To assign a Security Group to a Customer:

1. Click the **ADD GROUP** button in the Security Groups Screen.

   A Security Group Detail Window opens.

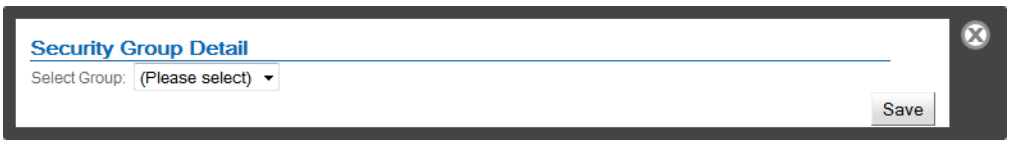


Figure 2-67: Security Group Detail

2. In the **Select Group** Selection Menu, select the Security Group to assign to the Customer.
3. The **Group ID** field, **Group Name** field, and **Privilege Type** Radio Buttons are displayed.
4. If necessary, select a new Security Group Privilege for the Customer.

   The **[DEFAULT]** value is the default privilege level for that Security Group.
5. Click **Save** to save the Security Group assignment and close the Security Group Detail Window.

   To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

Change a Security Group Privilege

To change the privilege type provided to Users belonging to a Security Group that is assigned to a Customer:

1. Open the Security Group assignment in a Security Group Detail Window.
2. Use the Privilege Type Radio Buttons to select the new privilege level.
3. Click **Save** to save the changes and close the Security Group Detail Window.

   To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

Delete a Security Group Assignment

To delete a Security Group that has been assigned to a Customer:

1. Open the Security Group assignment in a Security Group Detail Window.
2. Click the **Delete** button.

   The Window closes and the Security Group is removed from the Customer.

Associate Assignments

The Associate Assignments screen enables users to add, update, or delete associate assignments for a customer. To access the Associate Assignments screen, do one of the following:

- ❑ Click **ASSOCIATE ASSIGNMENT** in the Customer Actions Menu.
- ❑ Click the **edit** Link in the Associate Assignments section of the Customer Dashboard.

The Associate Assignments screen opens:

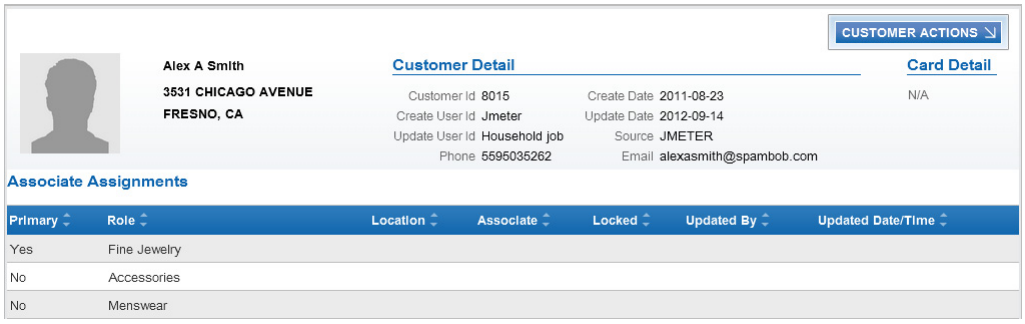


Figure 2-68: Associate Assignments Screen

Associate Assignments Screen

The Associate Assignments screen contains the following information:

- The Customer Basics area.
- An Associate Assignments List displaying the following information for each Associate Assignment:
  - **Primary** - Indicates whether the Associate is the primary Associate for the Customer.
    - **Yes** - The Associate is the primary Associate.
    - **No** - The Associate is not the primary Associate.
  - **Role** - Associate Role.

> **See also:** The *Relate Configuration Guide* for more information about Associate Roles.

  - **Location** - ID of the location where the Associate is located.
  - **Associate** - Name of the Associate.
  - **Locked** - Indicates whether the Associate is locked. For a description of this value, see "Lock/Unlock an Associate Assignment" on page 132.
  - **Updated By** - ID of the User who most recently updated the Associate Assignment.
  - **Updated Date/Time** - Date and time of the most recent update.

Associate Assignment Window

The Associate Assignment Detail Window is used to enter or update information for an Associate Assignment.

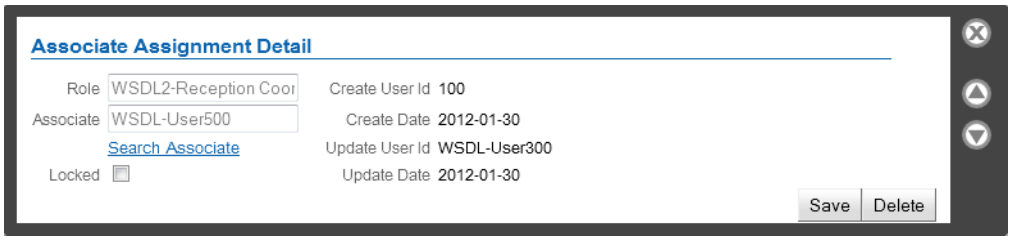


Figure 2-69: Associate Assignment Detail Window

The Associate Assignment Detail Window displays the following information:

- **Role** - Associate Role.

> **See also:** The *Relate Configuration Guide* for more information about Associate Roles.

- **Associate** - Name of the Associate.

- **Locked** - Determines whether the Associate is locked. For a description of this value, see "Lock/Unlock an Associate Assignment" on page 132.
- **Create User Id** - ID of user who originally assigned an Associate to the Customer.
- **Create Date** - Date on which an Associate was originally assigned to the Customer.
- **Update User Id** - ID of the user who most recently updated the Associate Assignment.
- **Update Date** - Date on which the Associate Assignment was most recently updated.

Change/Add Assigned Associate

To change the Associate assigned to a Customer:

1. In the Associate Assignment screen, click the Associate Assignment to edit.

   The Associate Assignment is opened in an Associate Assignment Detail Window.

2. Click the **Search Associate** Link.

   A Search Associate Window opens.

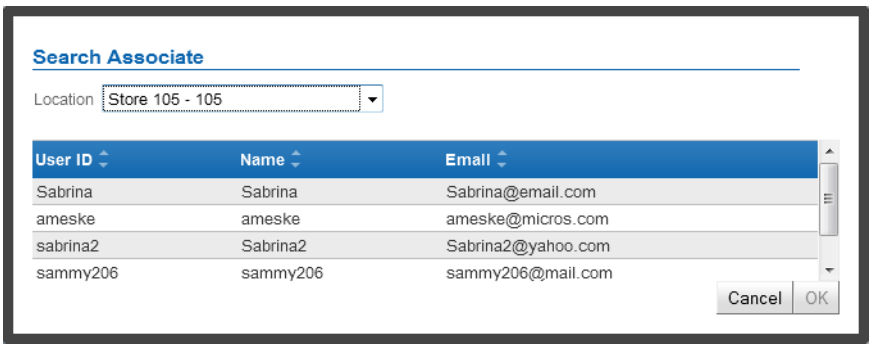


Figure 2-70: Search Associate Window

3. Use the **Location** Selection Menu to select the Location where the new Associate is located.

   The List is populated with Associates for the location. The following information is displayed for each Associate:

   - ❑ **User ID** - ID of the User.
   - ❑ **Name** - Name of the User.
   - ❑ **Email** - Email address for the User.

4. Click to select the User to assign as an Associate for the Customer.
5. Click **OK** to save the changes, or click **Cancel** to exit the Window without saving.

   The Search Associate Window closes and Relate returns to the Associate Assignment Detail Window.

6. Click **Save** to save the changes and close the Associate Assignment Detail Window.

   To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

Lock/Unlock an Associate Assignment

A locked Associate is an Associate that cannot be changed by an automatic mass assignment. If a mass assignment is performed, the locked Associate will remain assigned to the Customer.

For example, if a Customer wishes to keep a particular personal shopper at a location that is transferring most of their customer base to another personal shopper, locking the Associate Assignment will allow that Customer to keep that personal shopper when the mass assignment is performed.

To lock an Associate Assignment for a Customer:

1. In the Associate Assignment screen, click the Associate Assignment to edit.

   The Associate Assignment is opened in an Associate Assignment Detail Window.

2. Click the **Locked** Check Box to change the value.

   - **Checked** (☑) - The Associate Assignment is locked.
   - **Unchecked** (☐) - The Associate Assignment is not locked.

3. Click **Save** to save the changes and close the Associate Assignment Detail Window.

   To close the Window without saving the changes, click the **X** () in the top-right corner of the Window.

Delete Assigned Associate

To delete an Associate Assignment from a Customer:

1. In the Associate Assignment screen, click the Associate Assignment to edit.

   The Associate Assignment is opened in an Associate Assignment Detail Window.

2. Click the **Delete** Button.

   The Associate Assignment Detail Window closes and the Associate is removed from the Associate Assignment.

Segment Association

Segment Association screen allows Users to see all of the Segments to which a Customer belongs, and add the Customer to additional Manual Segments.

To open the Segment Association screen, do one of the following:

- ❑ Click **SEGMENT ASSOCIATION** in the Customer Actions Menu.
- ❑ Click the **edit** Link in the Segment section of the Customer Dashboard.

The Segment Association Screen opens.

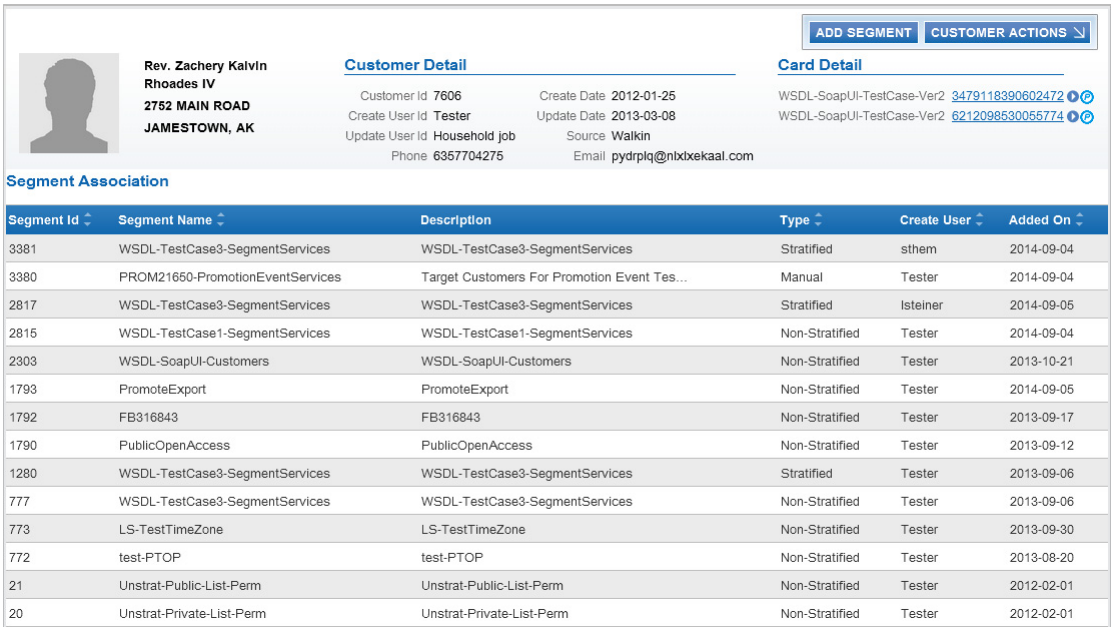


Figure 2-71: Segment Association Screen

Segment Association Screen

The Segment Association Screen contains the following information:

- The Customer Basics area.
- A List of Segments to which the Customer belongs. This List contains the following information for each Segment Association:
  - ❑ **Segment Id** - ID of the Segment.
  - ❑ **Segment Name** - Name of the Segment.
  - ❑ **Description** - Description of the Segment.
  - ❑ **Type** - Type of Segment.
  - ❑ **Create User** - ID of the user who created the Segment.
  - ❑ **Added On** - Date on which the Customer was added to a Manual Segment.

Segment Detail Window

To open a Segment in the Segment Detail Window, click the Segment in the Segment Association Screen.

The Segment Detail Window displays the following information:

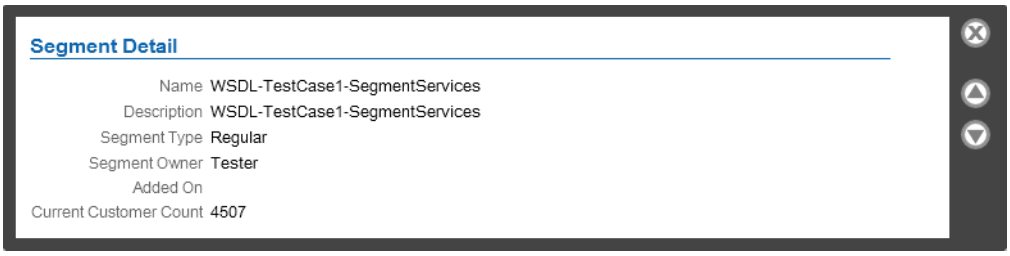


Figure 2-72: Segment Detail Window - Unstratified Segment

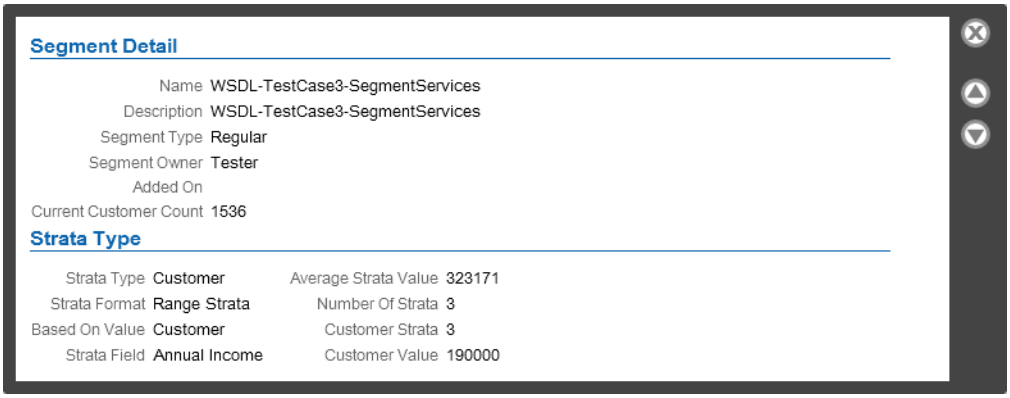


Figure 2-73: Segment Detail Window - Stratified Segment

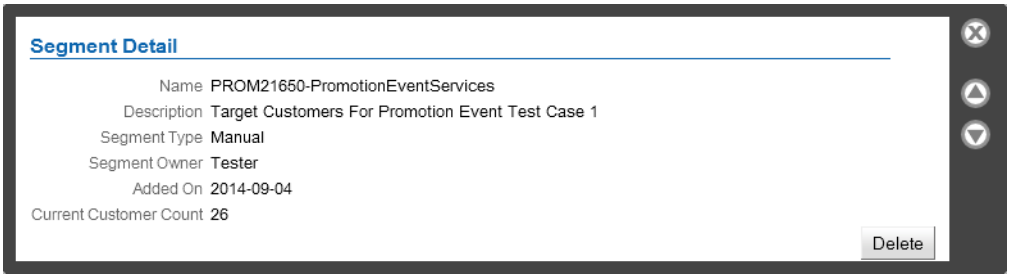


Figure 2-74: Segment Detail Window - Manual Segment

The Segment Detail Window displays the following information for all Segments:

- **Name** - Name of the Segment.
- **Description** - Description of the Segment.
- **Segment Type** - Type of Segment.
- **Segment Owner** - ID of the user who owns the Segment.
- **Added On** - Date on which the Customer was added to a Manual Segment.

- **Current Customer Count** - Number of Customers currently belonging to the Segment.

The Segment Detail Window displays the following information for Stratified Segments:

- **Strata Type** - Describes how Customers are divided into Strata.
- **Strata Format** - Format used to create the Strata.
- **Based On Value** - Basis used for determining the Strata Field.
- **Strata Field** - Field used to create the Strata.
- **Average Strata Value** - Mean value of the Strata Field for all Customers in the Strata.
- **Number Of Strata** - Number of Strata into which the Segment is divided.
- **Customer Strata** - Strata to which the Customer belongs.
- **Customer Value** - Value of the Strata Field for the Customer.

Add Customer to a Manual Segment

To add the Customer to a Manual Segment:

1. Click the **ADD SEGMENT** button in the Segment Association Screen.

   A Segment Detail Window opens.

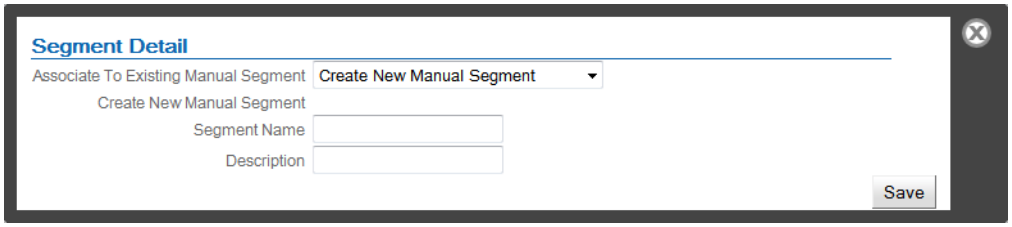


Figure 2-75: Create Segment Detail Window

2. Do one of the following:
   - ❑ Use the **Associate To Existing Manual Segment** Selection Menu to select the Segment to which the Customer will be added.
   - ❑ Use the **Segment Name** and **Description** Text Field to define a new Manual Segment to which the Customer will be added.
3. Click **Save** to save the changes and close the Window.

   To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

Remove a Customer From a Manual Segment

To remove a Customer from a Manual Segment:

1. In the Segment Association Screen, click the Segment to open it in a Segment Detail Window.
2. Click the Delete button in the Segment Detail Window.

   The Customer is removed from the Segment and the Segment is removed from the Segment Association Screen for the Customer.

Tasks

The Tasks screen displays the Tasks that are associated with the Customer.

To open the Tasks screen, click **TASKS** in the Customer Actions Menu. The Tasks Screen opens.

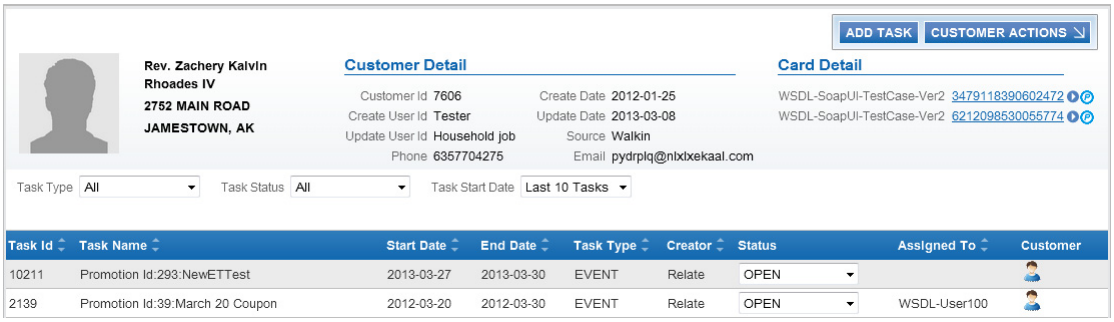


Figure 2-76: Tasks Screen

Tasks Screen

The Tasks screen displays the following information:

- The Customer Basics area.
- Task Filter menus:
  - **Task Type** - The type of Task. The values in this Selection Menu depend upon configuration.

    See also: *Relate Configuration Guide* for information about configuring custom Task types.

  - **Task Status -** Current status of the task.

    This Selection Menu has the following possible values:

    - **All** - **[DEFAULT]** Include all Tasks.
    - **OPEN** - Include only open Tasks.
    - **IN_PROGRESS** - Include only Tasks in progress.
    - **CANCELLED** - Include only cancelled Tasks.
    - **CLOSED** - Include only closed Tasks.
  - **Task Start Date** - Start date for the Task.

    This Selection Menu has the following possible values:

    - **Last 10 Tasks** - **[DEFAULT]** The last 10 Tasks started.
    - **Last 30 Days** - Tasks started in the last 30 days.
    - **Last 60 Days** - Tasks started in the last 60 days.
    - **Last 120 Days** - Tasks started in the last 120 days.

- **Last Year** - Tasks started in the last year.
- **All** - All Tasks.

- A List of Tasks, containing the following information for each Task:
  - **Task Id** - ID of the Task.
  - **Task Name** - Name of the Task.
  - **Start Date** - Date on which the Task starts.
  - **End Date** - Date on which the Task ends.
  - **Task Type** - Type of Task.
  - **Creator** - ID of the User who created the Task.
  - **Status** - Status of the Task.
  - **Assigned To** - ID of the User assigned to the Task.
  - **Customer** - An icon () indicates whether the Task is assigned to a Customer. *On this screen, the icon will always appear.*

Change Task Status

To change the status of a Task, select the new status in the **Status** Selection Menu in the Tasks Screen List.

Open a Task

To open a Task, click the Task in the Tasks Screen List. The Task opens in an Edit Task Window.

For more information about this Window and the functions that can be performed in it, see "Edit Task Window" on page 598.

Add a Task

To add a Task, click the **ADD TASK** button in the upper right of the Tasks Screen to open the Create a Task Window**.**

See "Create a Task" on page 604 for the full procedure.

Item Visualizer/Wish List

The Item Visualizer/Wish List screen displays the Items purchased by the Customer, and the Items that the Customer wishes to own.

To open the Item Visualizer/Wish List screen, click **ITEM VISUALIZER** in the Customer Actions Menu. The Item Visualizer/Wish List Screen opens.

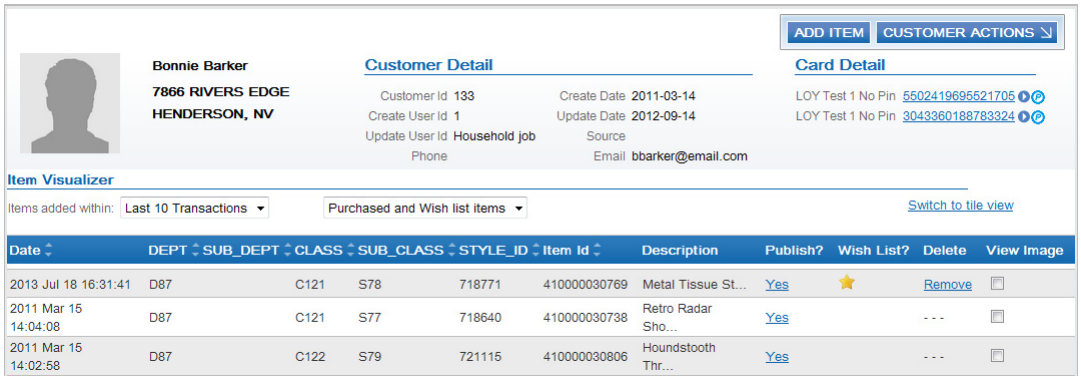


Figure 2-77: Item Visualizer/Wish List Screen

Item Visualizer/Wish List Screen

The Item Visualizer/Wish List screen has two formats: List View **[DEFAULT]** and Tile View.

- Click **Switch to list view** to view the Wish List in List View.
- Click **Switch to tile view** to view the Wish List in Tile View.

List View

The Item Visualizer/Wish List Screen displays the following information in List View:

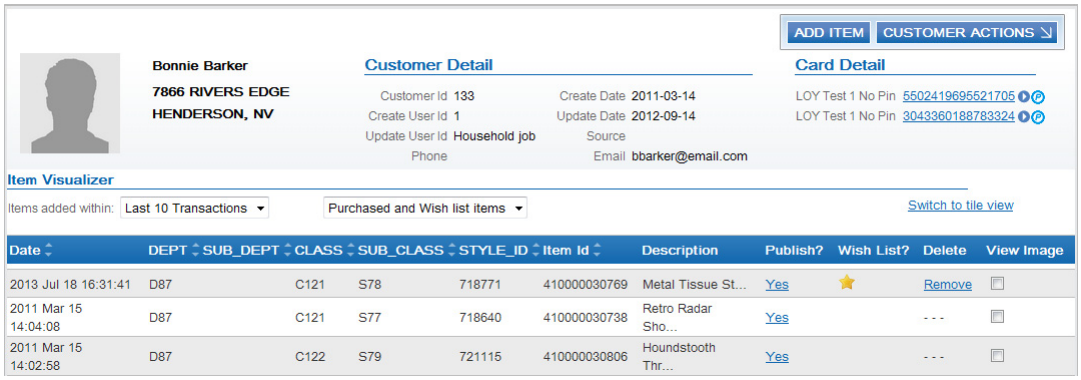


Figure 2-78: List View

- The Customer Basics area.
- Item Filter menus:
  - ❑ Date the Item was added to the Item Visualizer/Wish List.

    This Selection Menu has the following possible values:
    - ❍ **Last 10 Transactions** - **[DEFAULT]** Items added in the last 10 transactions.

- **Last 30 Days** - Items added in the last 30 days.
- **Last 60 Days** - Items added in the last 60 days.
- **Last 120 Days** - Items added in the last 120 days.
- **Last Year** - Items added in the last year.
- **All** - All Items added.

- How the Item was added to the List.

  This Selection Menu has the following possible values:

  - **Purchased items only** - Include only purchased Items.
  - **Wish list items only** - Include only Wish List Items.
  - **Purchased and Wish list items** - **[DEFAULT]** Include both purchased and Wish List Items.

- A List of Items, containing the following information for each Item:
  - **Date** - Date the Item was added to the Item Visualizer/Wish List.
  - **Item Hierarchy** - A set of fields defining the Item Hierarchy to which the item belongs. The number and names of these fields depend upon configuration.

    See also: The Relate Configuration Guide for more information about configuring the Item Hierarchy.

  - **Item Id** - ID of the Item.
  - **Description** - Description of the Item.
  - **Publish** - Indicates whether the Item is available to be viewed within a virtual closet. Includes a Link to change the value.
  - **Wish List?** - Indicates whether the Item is in the Wish List. If the Item has a star (⭐) in this field, the Item is in the Wish List.
  - **Delete** - For Items in the Wish List, includes a Link to remove the Item from the Wish List.
  - **View Image** - Indicates whether the Item will be shown in the Tile View.

Tile View

The Item Visualizer/Wish List Screen displays the following information in Tile View:

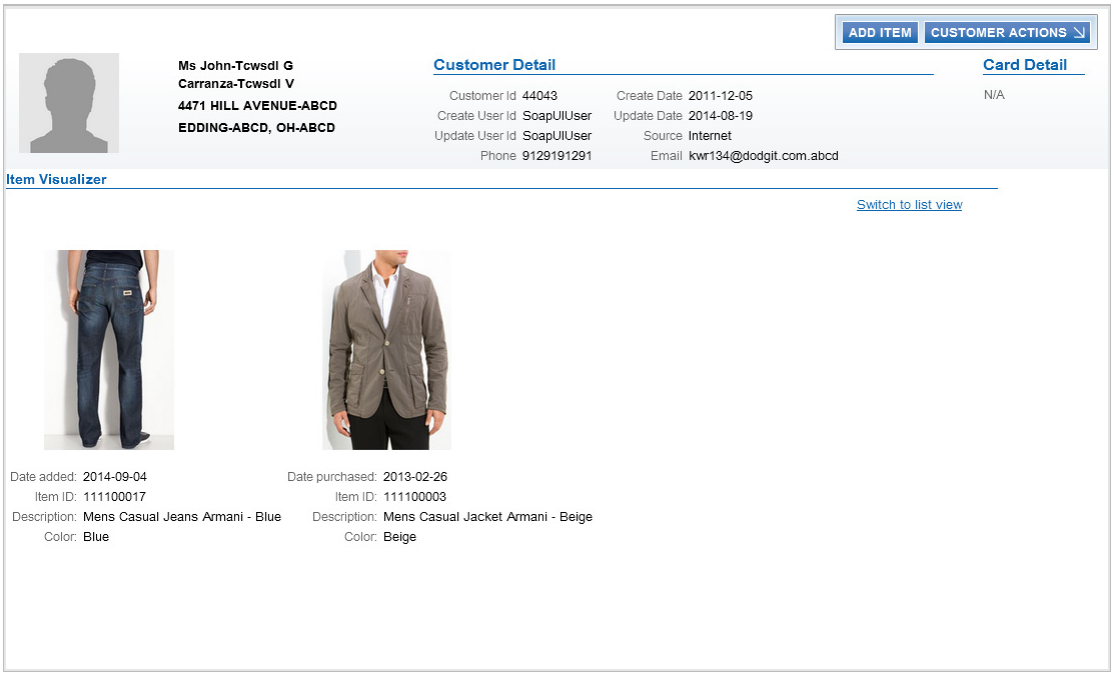


Figure 2-79: Tile View

- The Customer Basics area.
- Selected Items in the Item Visualizer/Wish List, with the following information for each Item:
  - Image for the Item.
  - **Date Purchased** - Date on which the Item was purchased. *This field is only shown for purchased items.*
  - **Date Added** - Date on which the Item was added to the Wish List. *This field is only shown for Wish List Items.*
  - **Item ID** - ID of the Item.
  - **Description** - Description of the Item.
  - **Color** - Color of the item.

Add Item to Wish List

To add an Item to the Wish List:

> *Prior to performing this procedure, select* **Wish list items only** *or* **Purchased and Wish list items** *in the Selection Menu for type of Item. The newly added Wish List Item will not appear if only Purchased Items are displayed.*

1. Click the **ADD ITEM** button in the Item Visualizer/Wish List Screen.

   A Window opens for adding a Wish List Item.



Figure 2-80: Add Wish List Item Window

2. Use the **Filter Criteria** Text Field to enter the Item ID search criteria.
3. Click the **Search** button.

   A List of Items with an Item ID containing the search criteria is displayed.

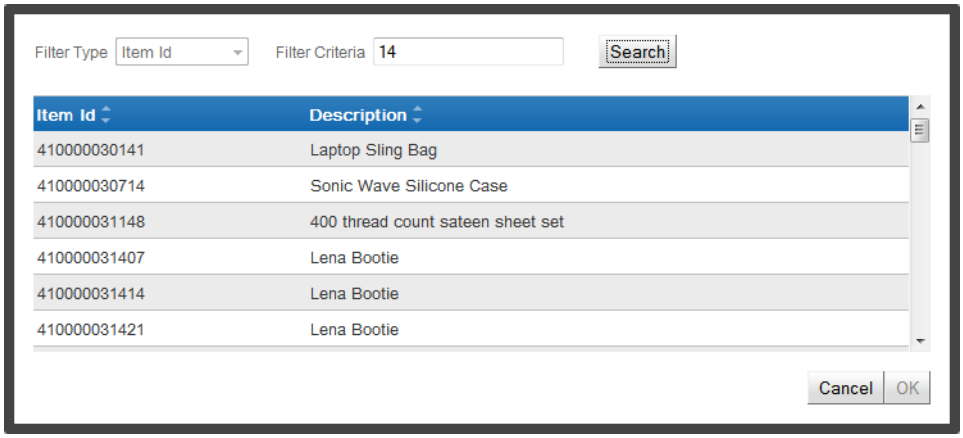


Figure 2-81: Search Results

4. Click an Item to select it.
5. Click the **OK** button to add the Item to the Wish List and return to the Item Visualizer/Wish List Screen.

   Click the **Cancel** button to close the Window and return to the Item Visualizer/Wish List Screen.

Remove Wish List Item

To remove an Item from a Wish List, click the **Remove** Link for the Item in the Item Visualizer/Wish List Screen. The Item is removed from the Wish List.

> *Relate does not ask for confirmation prior to deleting an Item from the Wish List. Be careful to remove the correct Item.*

Update Customer Image

In Relate, an image of a Customer can be displayed in the Customer screen.

To upload a new image for a Customer:

1. Click **UPDATE CUSTOMER IMAGE** in the Customer Actions Menu.
2. The Update Customer Image Window opens.

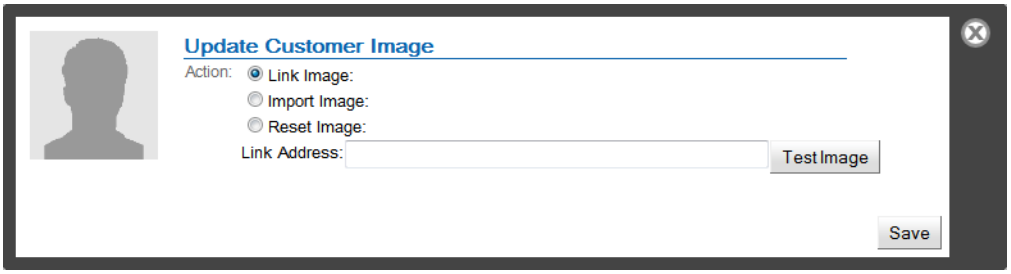


Figure 2-82: Update Customer Image Window

3. Use the **Action** Radio Buttons to select the method for updating the image:
   - ❑ **Link Image** - Link to an image through the internet. Continue with step 4.
   - ❑ **Import Image** - Import a file from a local directory. Continue with step 7.
   - ❑ **Reset Image** - Remove the current image. The image changes to the default "silhouette" image. Continue with step 9.
4. In the **Link Address** field, enter the URL of the image.
5. Click the **Test Image** button.

   The image should appear in the left side of the Window.

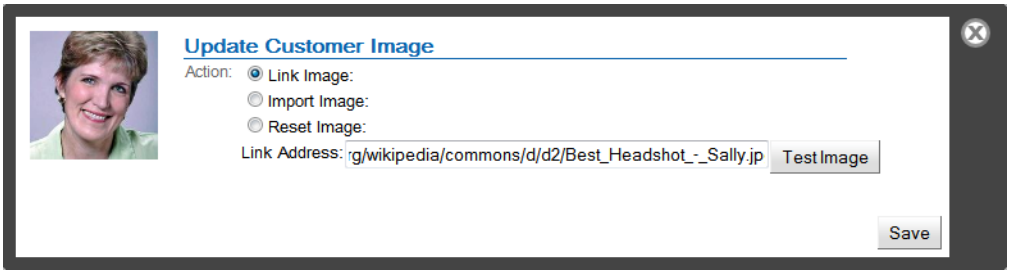


Figure 2-83: Test Image Displayed

If the image cannot be found or accessed, the Window displays an error. Return to step 4 and enter a correct, accessible URL.

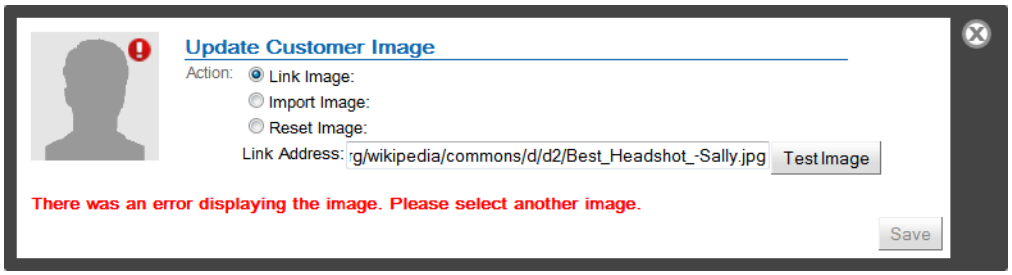


Figure 2-84: Error Displaying Image

6. Continue with step 9.
7. Use the **File to Import** File Upload field to select the file to upload.

   Upon selecting a file, the image appears in the left side of the Window.

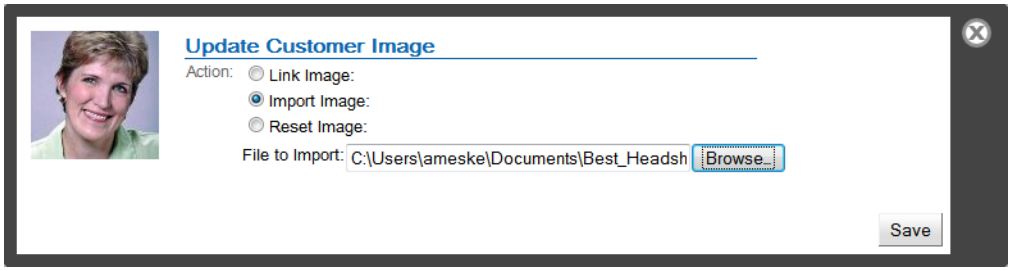


Figure 2-85: Import Image Displayed

If the image cannot be found or displayed, the Window displays an error.

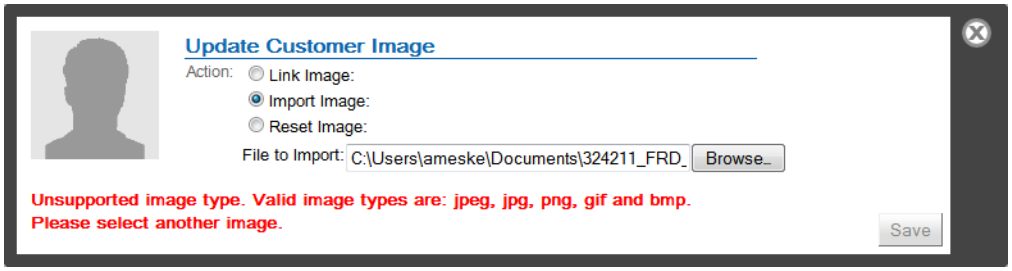


Figure 2-86: Image Type Unsupported

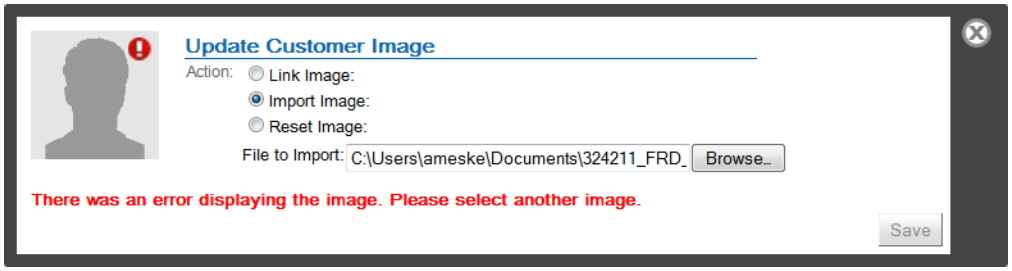


Figure 2-87: Image Display Error

8. Continue with step 9.
9. Click the **Save** button to save the changes and close the Window.

   Click the **X** ( ) in the upper-right corner of the Window to close the Window without saving the changes.

Gift Registry

The Gift Registry screen displays information about the Customer Gift Registries owned by the Customer.

This screen is opened by clicking **GIFT REGISTRY** in the Customer Actions Menu. The Gift Registry Screen opens.

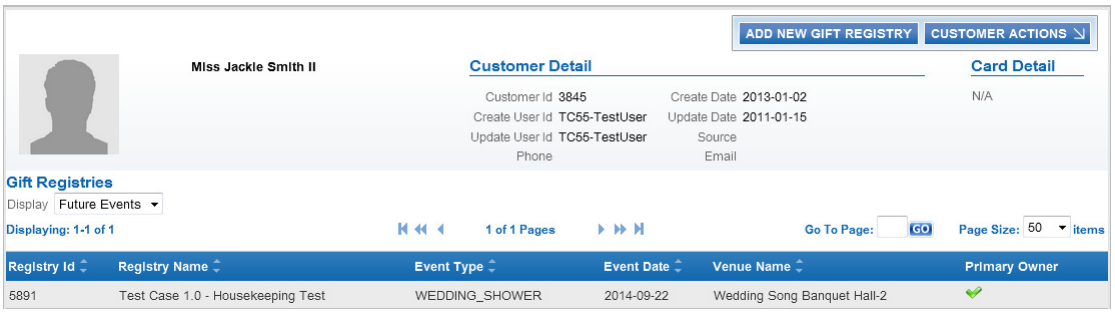


Figure 2-88: Gift Registry Screen

The Gift Registry Screen displays the following information:

- The Customer Basics area.
- Gift Registry Filter menus:
  - **Display** past or future events. This Selection Menu has the following options:
    - **All Events** - All events, both past and future.
    - **Future Events** - **[DEFAULT]** Only display events that are happening in the future.
    - **Past Events** - Only display events that have already occurred.
- A List of Gift Registries, containing the following information for each Registry:
  - **Registry Id** - ID of the Registry.
  - **Registry Name** - Name of the Registry.
  - **Event Type** - Type of event.
  - **Event Date** - Date of the event.
  - **Venue Name** - Name of the venue.
  - **Primary Owner** - If there is a check mark ( ) in this column, the Customer is the primary owner of the Registry.

Registry Information Window

The Registry Information Window displays the following information:

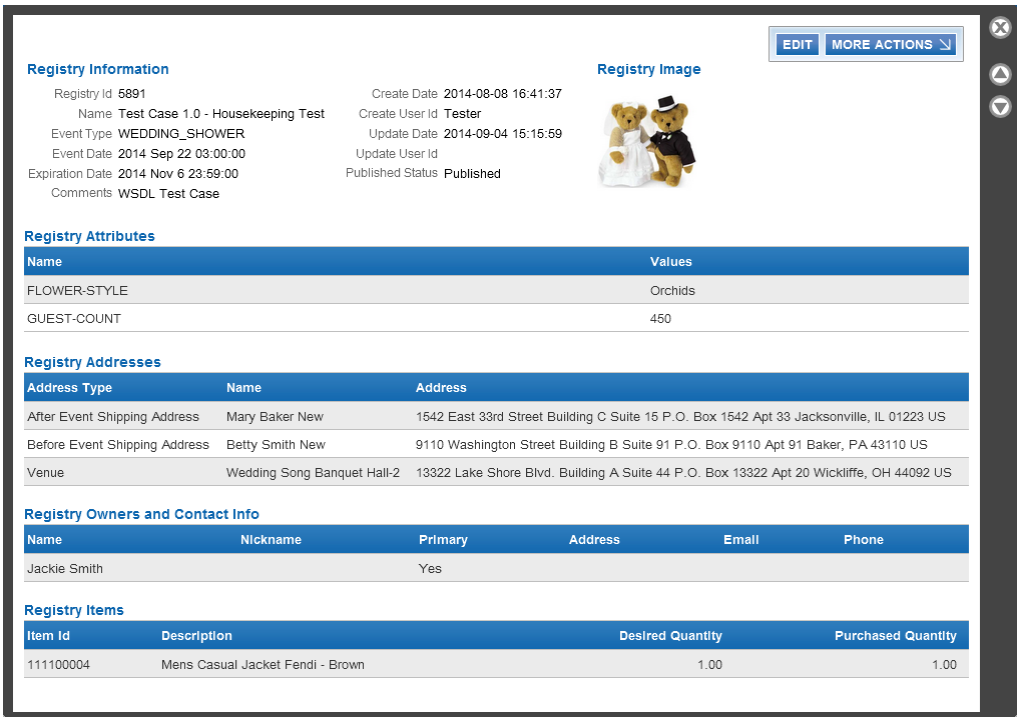


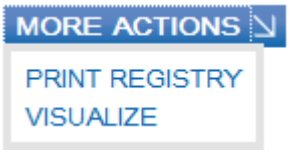
Figure 2-89: Registry Information Window

- **Registry Id** - ID for the Registry.
- **Name** - Name of the Registry.
- **Event Type** - Type of event for which the Registry was created.
- **Event Date** - Date of the event.
- **Expiration Date** - Date on which the Registry expires.
- **Comments** - Additional comments.
- **Create Date** - Date the Registry was created.
- **Create User Id** - ID of the User who created the Registry.
- **Update Date** - Most recent date on which the Registry was updated.
- **Update User Id** - ID of the User who most recently updated the Registry.
- **Published Status** - Indicates whether the Registry is publicly available.
- **Registry Image** - Image associated with the Registry.
- **Registry Attributes** - This List displays information about the Attributes assigned to the Registry. The following information is displayed for each Attribute:
  - **Name** - The name of the Attribute.
  - **Values** - The value(s) assigned to the Attribute.

- **Registry Addresses** - This List displays information about the address associated with the Registry. The following information is displayed for each address:
  - **Address Type** - The type of address.
  - **Name** - Name of the location.
  - **Address** - The address of the location.
- **Registry Owners and Contact Info** - This List displays information about the Customers who own the Registry. The following information is displayed for each Registry owner:
  - **Name** - Customer name.
  - **Nickname** - Nickname for the owner.
  - **Primary** - Indicates whether this Customer is the primary owner of the Registry.
  - **Address** - Customer address.
  - **Email** - Customer email address.
  - **Phone** - Customer phone number.
- **Registry Items** - This List displays information about the Items in the Registry. Click on an Item to view it in an Item Details Window. The following information is displayed for each Item:
  - **Item Id** - ID of the Item.
  - **Description** - A description of the item.
  - **Desired Quantity** - Requested quantity.
  - **Purchased Quantity** - Quantity purchased.

More Actions Menu

The More Actions Menu is the Actions Menu for the Registry Information Window. This menu has the following options:



- **PRINT REGISTRY** - Open the Registry in the Gift Registry Print page.
- **VISUALIZE** - Go to the Gift Registry Visualizer for the Customer.

Create a New Gift Registry

To create a new Gift Registry with the Customer as an owner:

1. Click the **ADD NEW GIFT REGISTRY** button.
2. Update the Gift Registry.

> *The Customer will be automatically entered as an owner in the Wizard.*

- ❑ Use Wizard Navigation to move through the Gift Registry and make any necessary changes.
- ❑ Click **save** when you are finished making changes. The Gift Registry will be saved and Relate will return to the Gift Registry screen.
- ❑ Click **cancel** to discard the changes and return to the Gift Registry screen.

Gift Registry Visualizer

The Gift Registry Visualizer displays the Items included in each Gift Registry owned by the Customer.

This screen is opened by clicking **GIFT REGISTRY VISUALIZER** in the Customer Actions Menu, or by clicking **VISUALIZE** in the More Actions Menu for the Registry Information Window. The Gift Registry Visualizer screen opens.

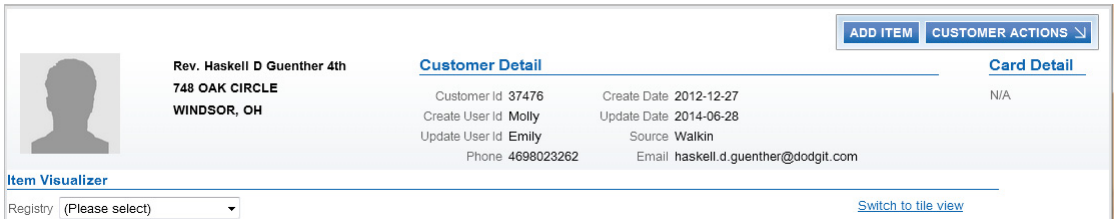


Figure 2-90: Gift Registry Visualizer Screen

View Registry Items

Use the **Registry** Selection Menu to select a Registry. A List containing the Items in the Registry opens. The following information is displayed for each Item:

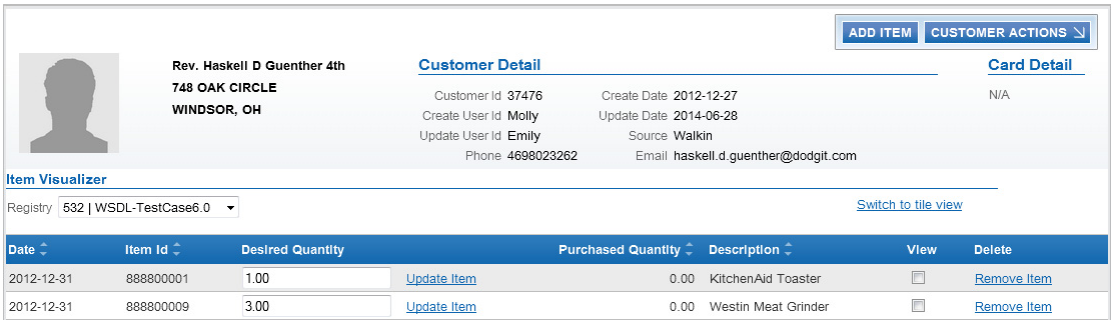


Figure 2-91: Gift Registry Visualizer - Registry Selected

- **Date** - Date and time the Item was added to the Registry.
- **Item Id** - ID of the Item.
- **Desired Quantity** - A Text Field containing the requested quantity of the Item, along with an **Update Item** Link used to Change the Desired Quantity of an Item.
- **Purchased Quantity** - Number of this Item that was purchased for the Registry.
- **Description** - Description of the Item.
- **View Image** - A Check Box indicating whether an image is displayed for the Item in the Tile View.
- **Delete** - Provides a Link for deleting the Item from the Registry.

Add an Item

To add an Item to a Registry:

1. Click the **ADD ITEM** button.

   An Item Search Window opens.



Figure 2-92: Item Search Window

2. Enter the Item ID search criteria in the **Filter Criteria** Text Field, or leave the **Filter Criteria** field empty to return a list of all Items.
3. Click the **Search** button.

A List of Items matching the search criteria is displayed.

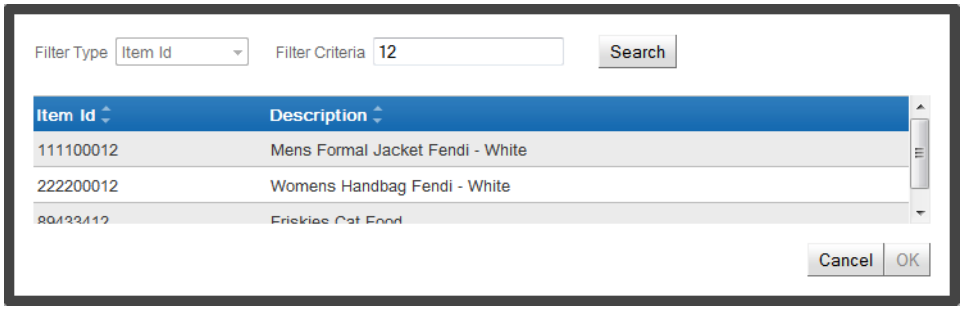


Figure 2-93: Item Search Results

4. Click an Item to select it.
5. Click the **OK** button.

   An Item Quantity Window opens.

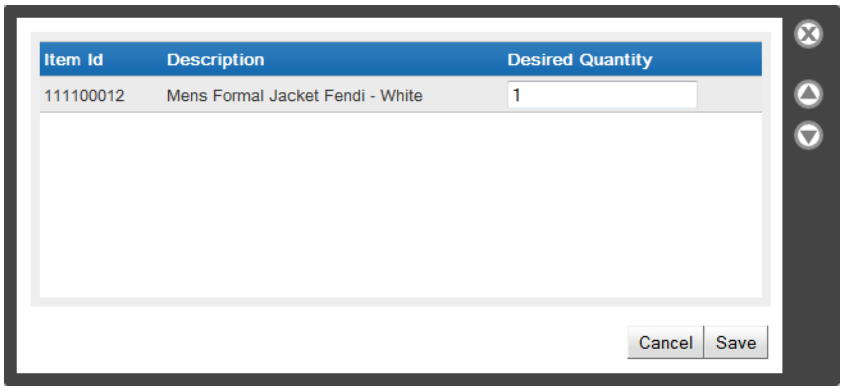


Figure 2-94: Item Quantity Window

6. Enter the requested quantity in the **Desired Quantity** Text Field.
7. Click **Save** to add the Item to the Registry with the entered quantity.

   The Item Search Window closes and the Item is added to the Registry.

Change the Desired Quantity of an Item

To change the requested quantity of an Item in a Registry:

1. Enter the new quantity in the **Desired Quantity** Text Field.
2. Click the **Update Item** Link.

   The Desired Quantity of the Item is updated.

Remove an Item from the Registry

Click the **Remove Item** Link for an Item to remove it from the Registry. The Item will be removed immediately—*no confirmation prompt is displayed.*

Preference Centers

The Preference Centers screen displays the contact preferences for a Customers.

Access the Preference Centers screen by doing one of the following:

- Click **PREFERENCE CENTER** in the Customer Actions Menu.
- Click the **edit** Link in the Preference Centers section of the Customer Dashboard.

The Preference Centers Screen opens.

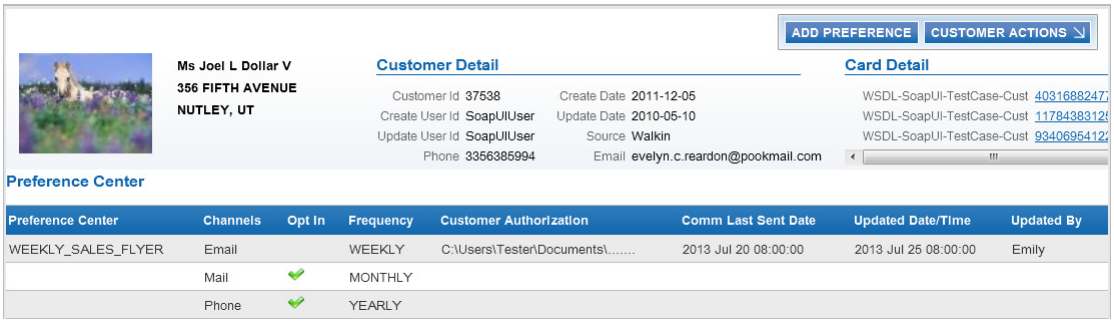


Figure 2-95: Preference Centers Screen

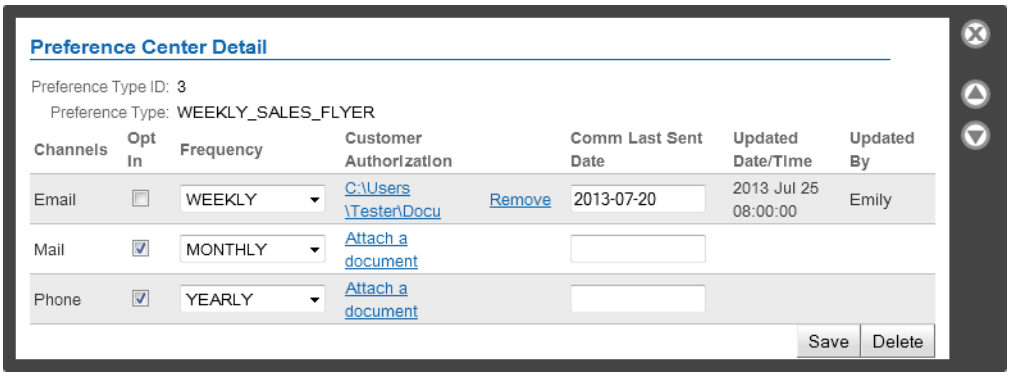
Preference Centers Screen

The Preference Centers screen displays the following information:

- The Customer Basics area.
- A List of Preference Centers, displaying the following information for each Preference Center:
  - **Preference Center** - Name of the Preference Center. This is displayed only for the first channel in a Preference Center.
  - **Channels** - The communication channel.
  - **Opt In** - Indicates whether the Customer has opted to be contacted through the channel. If there is a check mark (✔) in the field, the Customer will be contacted through the channel.
  - **Frequency** - The frequency at which the Customer will be contacted through the channel.
  - **Customer Authorization** - Name of the file in which the Customer authorized communication.
  - **Comm Last Sent Date** - Last date on which the Customer was sent a communication via the channel.
  - **Updated Date/Time** - Date and time the channel was last updated.
  - **Updated By** - ID of the User who last updated the channel.

Preference Center Detail Window

To open a Preference Center in a Preference Center Detail Window, click the Preference Center in the Preference Centers List.



The Preference Center Detail Window displays the following information:

- **Preference Type ID** - ID of the Preference Center type.
- **Preference Type** - Name of the Preference Center type.
- A List of Preference Center channels, displaying the following information for each Preference Center:
  - **Channels** - The communication channel.
  - **Opt In** - A Check Box determining whether the Customer has opted to be contacted through the channel. If there is a check mark (☑) in the field, the Customer will be contacted through the channel.
  - **Frequency** - A Selection Menu determining frequency at which the Customer will be contacted through the channel.
  - **Customer Authorization** - A Link to attach an authorization document and, if an authorization document has been uploaded, the name of the file in which the Customer authorized communication and a Link to remove the document.
  - **Comm Last Sent Date** - A Calendar Menu indicating the last date on which the Customer was sent a communication via the channel.
  - **Updated Date/Time** - Date and time the channel was last updated.
  - **Updated By** - ID of the User who last updated the channel.

Create a Preference Center

To create a Preference Center for a Customer, do the following:

1. Click the **ADD PREFERENCE** button on the Preference Centers page.
2. A blank Preference Center Detail Window opens.

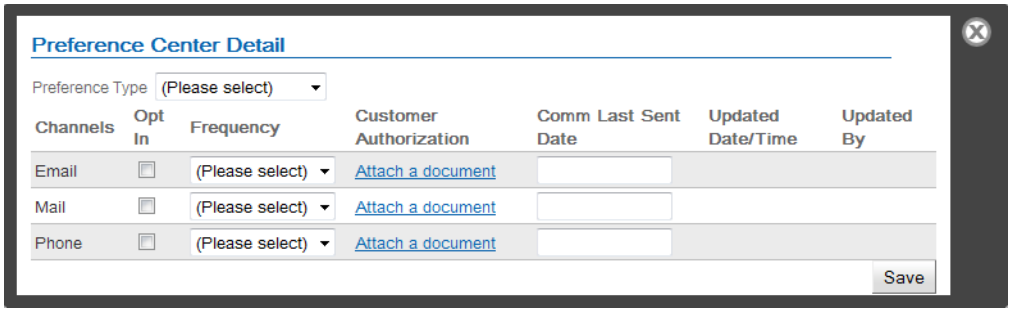


Figure 2-96: Blank Preference Center Detail Window

3. Use the **Preference Type** Selection Menu to select the type of preference. *The options in this menu are determined by configuration.*

   The **Frequency** Selection Menu for each channel is populated.

> **See also:** The *Relate Configuration Guide* for more information about configuring Preference Types.

4. Configure the Preference Center:
   - ❑ Use the **Opt In** Check Box the define whether the Customer will be contacted through the channel. If there is a check mark (☑) in the field, the Customer will be contacted through the channel.
   - ❑ Use the **Frequency** Selection Menu to define the frequency at which the Customer will be contacted through the channel.
   - ❑ If necessary, Add or Update a Customer Authorization Document.
   - ❑ If necessary, use the **Comm Last Sent Date** Calendar Menu to change the most recent communication date for the channel.
5. Click the **Save** button.

   The Preference Center Detail Window closes and the new Preference Center is added to the Preference Centers List.

Delete a Preference Center

To delete an entire Preference Center for a Customer, do the following:

1. Click the Preference Center in the Preference Centers List.

   The Preference Center opens in a Preference Center Detail Window.

2. Click the **Delete** button.

   A confirmation Window opens.

3. Click **OK** to delete the Preference Center and return to the Preference Centers List.

   Click **Cancel** to return to the Preference Center Detail Window without deleting the Preference Center.

Edit a Preference Center

To edit a Preference Center for a Customer, do the following:

1. Open the Preference Center in a Preference Center Detail Window.
2. Make the necessary changes to the Preference Center:
   - ❑ Use the **Opt In** Check Box the define whether the Customer will be contacted through the channel. If there is a check mark (☑) in the field, the Customer will be contacted through the channel.
   - ❑ Use the **Frequency** Selection Menu to define the frequency at which the Customer will be contacted through the channel.
   - ❑ If necessary, Add or Update a Customer Authorization Document.
   - ❑ If necessary, Remove a Customer Authorization Document.
   - ❑ Use the **Comm Last Sent Date** Calendar Menu to change the most recent communication date for the channel.
3. Click the **Save** button to save the changes and close the Preference Center Detail Window, or click the  in the upper right corner to close the Preference Center Detail Window without saving.

Add or Update a Customer Authorization Document

To add or update the customer authorization document for a Preference Center channel, do the following:

1. In the Preference Center Detail Window, click the Link in the Customer Authorization column (either **Attach a document**, or the name of the authorization file).

   A **Choose a document file to import** Window opens.



Figure 2-97: Choose a Document File to Import Window

2. Click the **Browse...** button.

   The file upload procedure depends upon the operating system and browser being used. See the appropriate documentation for assistance.

3. Once the file is selected, click the **Import** button to import the document

   The Window closes and the filename is displayed in the Customer Authorization Link.

> *The Customer Authorization file is not actually saved until the Save button is clicked in the Preference Center Detail Window.*

Remove a Customer Authorization Document

To remove a customer authorization document for a Preference Center channel, click the **Remove** Link in the Preference Center Detail Window. The file is removed from the channel.

> *The Customer Authorization file is not actually removed until the Save button is clicked in the Preference Center Detail Window.*

Social Profile

The Social Profile screen displays the social profiles associated with the Customer.

Access the Social Profile screen by doing one of the following:

- Click **SOCIAL PROFILE** in the Customer Actions Menu.
- Click the **edit** Link in the Social Profile section of the Customer Dashboard.

The Social Profile Screen opens.

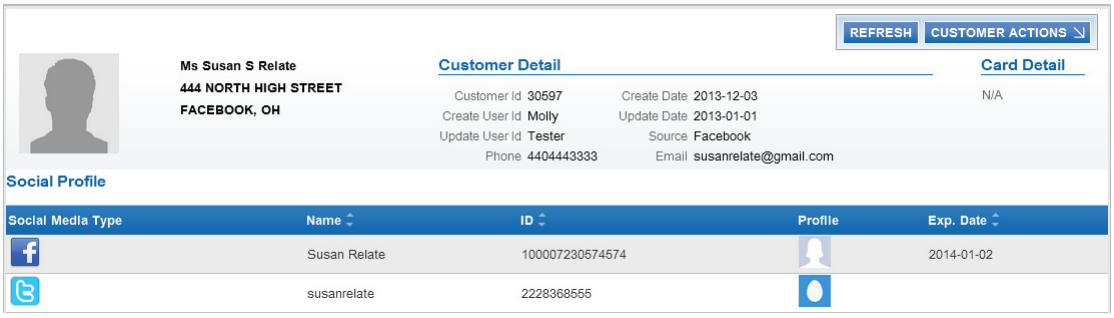


Figure 2-98: Social Profile Screen

Social Profile Screen

The Social Profile screen displays the following information:

- The Customer Basics area.
- A List of Social Profiles, displaying the following information for each Social Profile:
  - **Social Media Type** - An icon indicating the social media network associated with the Social Profile.
  - **Name** - Name of the social profile.
  - **ID** - ID of the account on the social network.
  - **Profile** - Image representing the customer on the social network.
  - **Exp. Date** - Date the token associated with the network expires.

Social Profile Detail Window

To open a Social Profile in a Social Profile Detail Window, click the Social Profile in the Social Profile List.

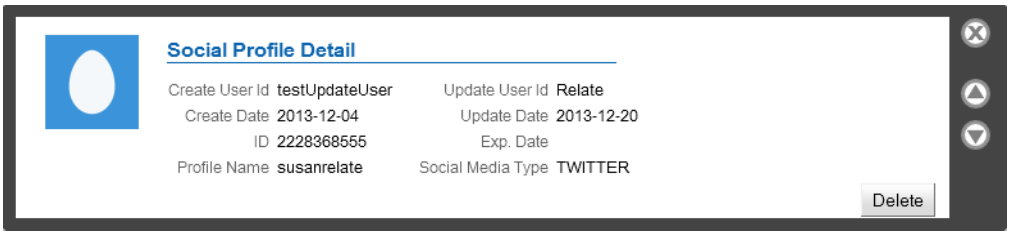


Figure 2-99: Social Profile Detail Window

The Social Profile Detail Window displays the following information:

- Image associated with the account on the social network.
- **Create User Id** - ID of the User who created the Social Profile.
- **Create Date** - Date the Social Profile was created.
- **ID** - ID of the account on the social network.
- **Profile Name** - Name of the Customer on the social network.
- **Update User Id** - ID of the User who most recently updated the Social Profile.
- **Update Date** - Most recent date on which the Social Profile was updated.
- **Exp. Date** - Date the token allowing access to the social network expires.
- **Social Media Type** - The social network associated with the Social Profile.

Delete a Social Profile

To delete a Social Profile from a Customer account, do the following:

> *You cannot recreate a Social Profile after deleting it. Only the Customer can reassociate their social network account with their Customer record.*

1. Click the Social Profile in the Social Profile List.

   The Social Profile opens in a Social Profile Detail Window.
2. Click the **Delete** button.

   A confirmation Window opens.
3. Click **OK** to delete the Social Profile and return to the Social Profile List.

   Click **Cancel** to return to the Social Profile Detail Window without deleting the Social Profile.

Social Activity

The Social Activity Screen displays the posts by a Customer on their social media account(s). This includes all posts from all of the Customer's Social Profiles.

To access the Social Activity screen, click **SOCIAL ACTIVITY** in the Customer Actions Menu.

The Social Activity Screen opens.

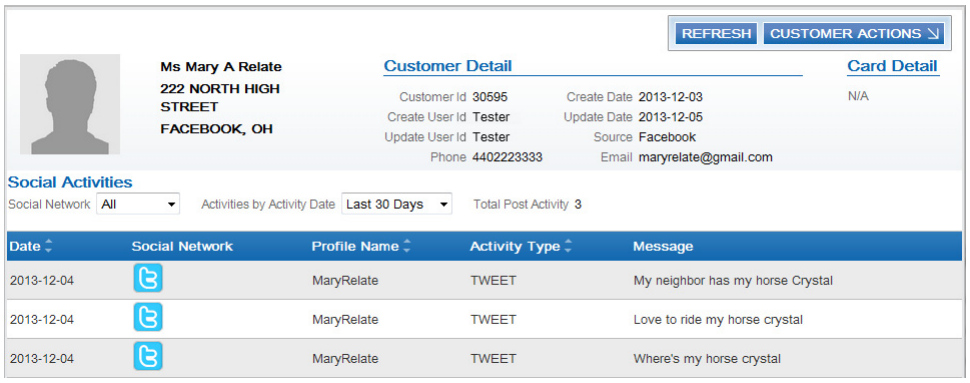


Figure 2-100: Social Activity Screen

Social Activity Screen

The Social Activity screen displays the following information:

- The Customer Basics area.
- Social Activities Filter menus:
  - **Social Network** - Filters the List by the social network on which the post was made. This Selection Menu contains the names of the social networks configured for Relate.

    See also: The *Relate Configuration Guide* for information about configuring social networks.

  - **Activities by Activity Date** - The time within which the post was made. This Selection Menu has the following values:
    - **Last 30 Days** - Display the posts from within the last 30 days.
    - **Last 60 Days** - Display the posts from within the last 60 days.
    - **Last 120 Days** - Display the posts from within the last 120 days.
    - **Last Year** - Display the posts from within the last year.
    - **All** - Display all posts for the Customer.
- A List of social media posts, displaying the following information for each post:
  - **Date** - Date of the post.
  - **Social Network** - Image representing the social network on which the post was made.
  - **Profile Name** - Name of the Social Profile associated with the post.

- **Activity Type** - Type of posting.
- **Message** - Text of the post.

Franchisee Assignment

The Franchisee Assignment screen allows the user to view or change the Franchisees to which a Customer is assigned.

Access the Franchisee Assignment screen by doing one of the following:

- Click **FRANCHISEE ASSIGNMENT** in the Customer Actions Menu.
- Click the **edit** Link in the Franchisee Assignment section of the Customer Dashboard.

The Franchisee Assignment Screen opens.

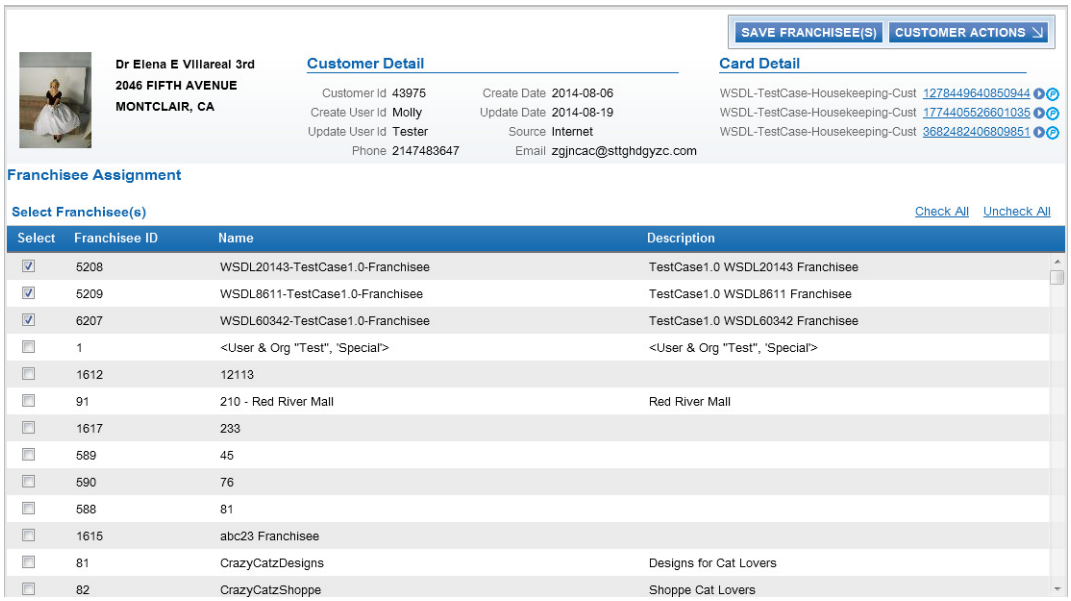


Figure 2-101: Franchisee Assignment Screen

Franchisee Assignment Screen

The Franchisee Assignment screen displays the following information:

- The Customer Basics area.
- A List of Franchisees, displaying the following information for each Franchisee:
  - **Select** - A Check Box indicating whether the Customer is assigned to the Franchisee. If there is a check mark (☑) in the field, the Customer is assigned to the Franchisee.
  - **Franchisee ID** - ID of the Franchisee.
  - **Name** - Name of the Franchisee.
  - **Description** - A description of the Franchisee.

Change Customer Franchisee Assignments

To change the Franchisees to which the Customer is assigned:

1. Use the **Select** Check Box for each Franchisee to determine whether the Customer is assigned to the Franchisee.
   - ❑ Click the **Check All** Link to include all Franchisees.
   - ❑ Click the **Uncheck All** Link to remove all Franchisees.
2. Click the **SAVE FRANCHISEE(S)** button to saves the changes.

Customer Validation



The Customer Validation process is determined by configuration, including whether or not validation is performed. Refer to the **Relate Configuration Guide** *for more information, or contact your Project Manager.*

Whenever a new Customer is added or updated, the Customer information (first name, last name, prefix, suffix, gender, address, postal code, phone number, and email address) is validated. If any of the information provided does not meet the criteria of the Relate application, the Customer, address, phone, or email address is marked as "invalid" and a validation error is recorded. This does not affect how the information is saved or used, it just means the information did not meet the criteria.

Names

All numbers, punctuation, any repeating spaces, and special characters except (, –, ', or) are removed from the first, middle, and last names. The first letter of each name, if applicable, is capitalized. If the middle initial is included as part of the first or last name, it is stripped out and saved into the data object.

If the first or last name is missing, the Customer is marked as invalid and the appropriate validation errors are generated.

Prefix (Salutation)

The prefix is checked to see if it matches or is very close to one of the following:

MR	Miss	MRS	MS	DR	Imam
Rev.	Sir	Sister	Father	Hon.	HRH

If the prefix does not match or is not close, the Customer is marked as invalid and a validation error is generated.

Suffix

The suffix is checked to see if it matches or is very close to one of the following:

Esq.	Sr.	Jr.	II	III

IV V 2nd 3rd 4th

If the suffix does not match or is not close, the Customer is marked as invalid and a validation error is generated.

Gender

Any value can be entered for gender as long as the value starts with `M`, `m`, or `1` for male, or `F`, `f`, `W`, `w`, or `0` for female. If one of these values is found, the value is replaced with `M` or `F` and saved. If one of these values is not found; the original value is saved, the Customer is marked as invalid, and a validation error is generated.

Address

If all address lines are blank or there is no city or postal code, the address is marked as invalid and a validation error is generated.

Postal Code

Any non-numerical or non-alphabetic characters—except for a hyphen (`-`), comma (`,`), or period (`.`)—are removed from the postal code. If the results do not match `99999`, `99999-9999`, or `A1A1A1`, then the address is marked as invalid and a validation error is generated.

Email Address

The system looks for a `@` symbol in the email address. If found, the system verifies that the email address is in the proper format: `accountname@sub-domain.domain`. If there is no `@` symbol, the system looks for a `#` symbol. If one is found, it is replaced with an `@` symbol and the system verifies that the email address is in the proper format. If the email address is in the wrong format, the email address is marked as invalid and a validation error is generated.

Phone

The application looks for and removes any non-numeric character except for `E`, `e`, `X`, `x`, `T`, or `t`. Any leading `1` (one) characters are removed. If the phone number starts with a `0`, the phone number is marked as invalid and a validation error is generated.

The extension, if any, is identified, removed, and saved in the extension field.

CHAPTER 3

Clienteling

Overview

The Clienteling module in Relate allows Users to search for sets of Customers that meet certain, specified criteria.



The "Relate_ClientelingCustomerSearch" role is required to access this area of Relate and perform the functions available in it.

See also: The *Relate Configuration Guide* for more information about Roles.

About This Chapter

This chapter contains the following information:

- "Clienteling Customer Lookup/Edit" on page 162 describes the page used to search for Customers, as well as the search procedure.
- "Clienteling Customer List" on page 164 describes the page showing a list of Customers found by a Clienteling Customer search.

Clienteling Customer Lookup/Edit

Open the Clienteling Customer Lookup/Edit page by clicking the **Customer->Clienteling Customer Lookup/Edit** menu option, or by clicking the **Clienteling Customer Lookup/Edit** Link on the Main Page

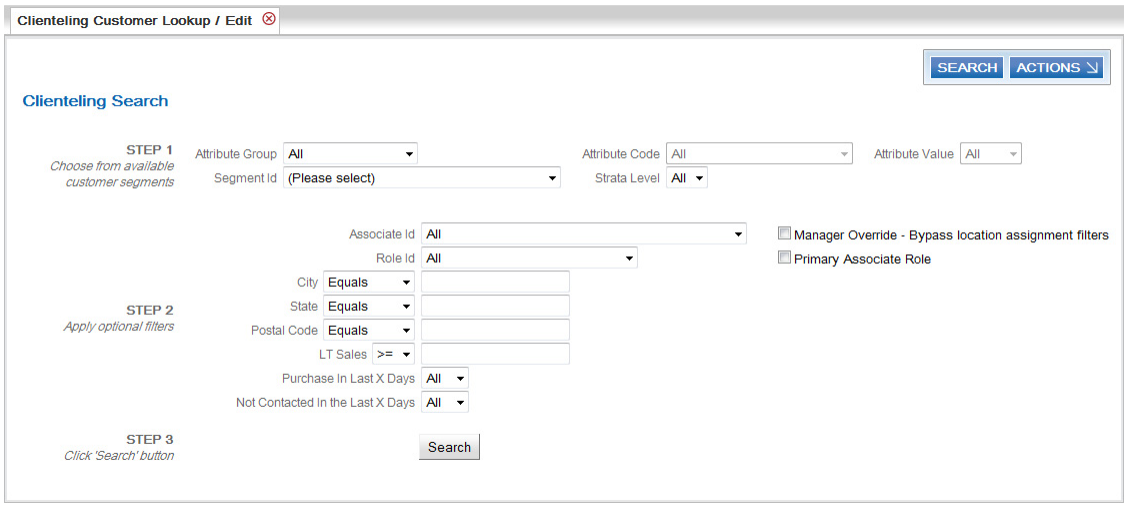


Figure 3-1: Clienteling Customer Lookup/Edit Page

Use the Clienteling Customer Lookup/Edit page to perform a Clienteling Search.

Clienteling Search

A Clienteling search is a search for a set of Customers that meet certain, specified criteria.

> *This is different from a Customer Lookup, which uses Customer profile information to help a User look up a specific Customer.*

To perform a Clienteling search, do the following:

1. Open the Clienteling Customer Lookup/Edit page.
2. In the STEP 1 section, use the Selection Menus to filter the Segments contained in the **Segment Id** Selection Menu.

> *It is not required to select a value in all (or any) of the three following menus. However, it is recommended that you narrow down the* **Segment Id** *Selection Menu as much as possible by selecting values in all three of the following menus.*

   a. Select an **Attribute Group** in the Selection Menu.

      After selecting an Attribute Group:

      - The **Segment Id** Selection Menu only displays the Segments assigned the selected Attribute Group.

- The **Attribute Code** Selection Menu is activated and populated with the Attributes in the selected Attribute Group.

b. Select an **Attribute Code** in the Selection Menu. *This Selection Menu is only activated after an **Attribute Group** has been selected (see above).*

After selecting an Attribute Code:

- The **Segment Id** Selection Menu only displays the Segments assigned the selected Attribute Group and Attribute.
- The **Attribute Value** Selection Menu is activated and populated with the values that have been assigned to the Attribute.

c. Select an **Attribute Value** for selected Attribute (see step b) in the Selection Menu. *This Selection Menu is only activated after an **Attribute Group** and an **Attribute Code** have been selected (see above).*

After selecting an Attribute Value, the **Segment Id** Selection Menu only displays the Segments assigned the selected Attribute Group, Attribute, and Attribute Value.

3. Select a **Segment Id** in the Selection Menu in the STEP 1 section.

4. If necessary, enter STEP 2 search criteria:

- **Associate Id** - ID of the Associate assigned to the Customer(s). Uses a Selection Menu.
- **Role Id** - Role for an Associate assigned to the Customer(s). Uses a Selection Menu.

  This Selection Menu is populated with the Roles to which the User is assigned.



If the User is not associated with any Role, or if the User is assigned to only one Role, this Selection Menu will be inactive.

- **City** - Customer city. Uses a Text Field with a Matching Rule Menu.
- **State** - Customer state. Uses a Text Field with a Matching Rule Menu.
- **Postal Code** - Customer Postal or ZIP code. Uses a Text Field with a Matching Rule Menu.
- **LT Sales** - Total amount of lifetime sales for the Customer(s). Uses a Text Field with a Numeric Comparison Menu.
- **Purchase In Last X Days** - Range of recent days in which the Customer(s) made a purchase. Uses a Selection Menu.
- **Not Contacted In the Last X Days** - Range of recent days during which the Customer(s) have not been contacted. Uses a Selection Menu.
- **Manager Override - Bypass location assignment filters** - Select this Check Box to search for Customers associated with at least one Transaction in which the User's Location is not the Customer's home location, and the Customer is associated with a Transaction at the User's Location.

- **Primary Associate Role** - Select to search for Customers associated with an Associate with the primary Associate Role.

> *If the User is not associated with any Role, or if the User is assigned to only one Role, this Selection Menu will be inactive.*

5. Click the **Search** button in STEP 3.

   The search results are displayed in a Clienteling Customer List.

Clienteling Customer List

After performing a Clienteling Search, the Customers found by the search are displayed in a Clienteling Customer List page.



Figure 3-2: Clienteling Customer List

Table 3-1: *Customer List Page Key*

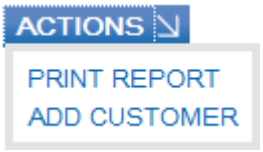
Item	Description
1	**Search Criteria** - Displays the search criteria used for the search results displayed in the List.
2	**Search Button** - Click to return to the Clienteling Customer Lookup/Edit page and perform another search.
3	**Actions Menu** - Click to open a menu of actions that can be performed in the Clienteling Customer List page. See "Actions Menu" on page 165 for more information.
4	**Filter Menu** - Select criteria in the Filter Menu to view a subset of the Customers in the List.
5	**Page Navigation** - Page Navigation for the List.

Table 3-1: *Customer List Page Key (continued)*

Item	Description
6	**Customer List** - A List of Customers matching the search criteria. Use the Filter Menu to narrow down the List and locate a certain Customer. This List includes the following information for each Customer: ■ **Customer Id** - Unique identifier for the Customer. ■ **First Name** - Customer's first name. ■ **Last Name** - Customer's last name. ■ **Address** - Street address for the Customer. ■ **City** - Customer's city. ■ **State** - State or province for the Customer.

Actions Menu

The Actions Menu for the Clienteling Customer List page includes the following option:



- **PRINT REPORT** - Create a printable Customer Clienteling Report List of the Customers in the Clienteling Customer List. This report displays a list of Customers grouped by the Associate to whom they are assigned through Clienteling. For more information about Reports, see Chapter 24, "Analytics/Reports" on page 670.
- **ADD CUSTOMER** - Create a new Customer. See "Create a Customer" on page 92.

Filter Menu

The records in the Clienteling Customer List can be filtered using the following Filter:

- **My Customers** - This Selection Menu filters the List of Customers by whether each Customer is assigned to the logged-in User. This Selection Menu has the following options:
  - **All Customer** - **[DEFAULT]** Show all Customers matching the search criteria.
  - **My Customers** - Show only the Customers to which the logged-in User is assigned and who match the search criteria.

Open a Customer Record

To open a Customer Record in the Clienteling Customer List, click the Customer in the List. The Customer record is opened in a Customer Summary Window.

CHAPTER 4

Customer Merge Review

Overview

The Customer Merge Review Process allows you to search for and view duplicates prior to approving a merge.

Merge Description

Customer Merges combine multiple Customer records into one, new Customer record. This new Customer record includes the Transaction, Card, and Account information from all the merged Customer records. Other Customer data—addresses, email addresses, phone numbers, and so on—are taken from a single source record determined by Relate.

About this Chapter

This chapter includes the following information:

- "Customer Merge Review" on page 167 - This section describes the Customer Merge Review page and the activities performed through it.

Customer Merge Review

To open the Customer Merge Review page, use the **Customer->Customer Merge Review** menu option, or by clicking the **Customer Merge Review** Link on the Main Page.



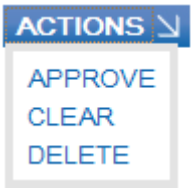
Figure 4-1: Customer Merge Review

The Customer Merge Review page includes the following fields:

- **Duplicate Strategy** - This Selection Menu is used to select the Duplicate Strategy results to review.
- **Strategy Status** - This field displays the Strategy Status of the duplicates to be displayed.

Actions Menu

The Actions Menu for the Customer Merge Review page has the following options:



- **APPROVE** - Indicates to the system that the duplicates found by the currently selected Strategy should be merged. See "Approve Duplicates" on page 169 for more information.
- **CLEAR** - Indicates to the system that the duplicates found by the currently selected Strategy should not be merged. See "Disallow Duplicate Merges" on page 170 for more information.
- **DELETE** - Delete all of the found duplicates from the currently selected Strategy. "Delete Duplicates" on page 170 for more information.

View Duplicates

To review the duplicates found by the last Duplicate Search:

1. In the **Duplicate Strategy** Selection Menu, select the Strategy of the search to view.

   A **Number of customers per set=set count** Selection Menu is displayed.

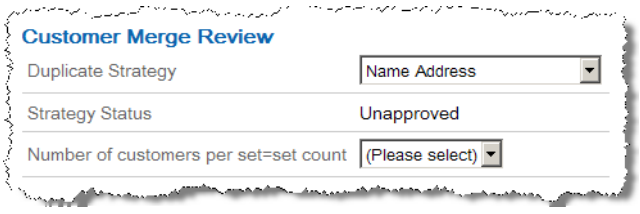


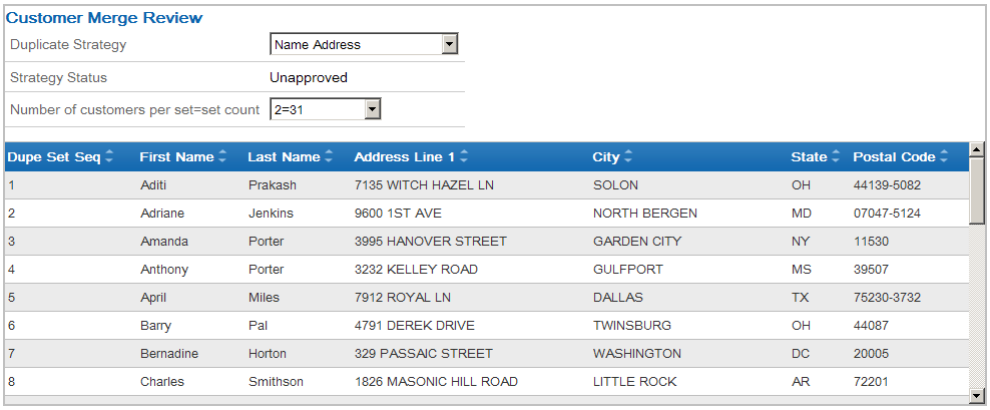
Figure 4-2: Search Strategy Selected

2. Select the **Number of customers per set=set count** duplicate sets.

   This menu displays the following information:

   - **Number of customers per set** - The number of Customers found as possible matches by the Duplicate Search.
   - **set count** - The number of duplicates found.

   Once a selection is made, a List of duplicates is displayed.



Dupe Set Seq	First Name	Last Name	Address Line 1	City	State	Postal Code
1	Aditi	Prakash	7135 WITCH HAZEL LN	SOLON	OH	44139-5082
2	Adriane	Jenkins	9600 1ST AVE	NORTH BERGEN	MD	07047-5124
3	Amanda	Porter	3995 HANOVER STREET	GARDEN CITY	NY	11530
4	Anthony	Porter	3232 KELLEY ROAD	GULFPORT	MS	39507
5	April	Miles	7912 ROYAL LN	DALLAS	TX	75230-3732
6	Barry	Pal	4791 DEREK DRIVE	TWINSBURG	OH	44087
7	Bernadine	Horton	329 PASSAIC STREET	WASHINGTON	DC	20005
8	Charles	Smithson	1826 MASONIC HILL ROAD	LITTLE ROCK	AR	72201

Figure 4-3: Duplicate List

The duplicate List displays the following information for each duplicate:

> *The Address information displayed is from the source record.*

- **Dupe Set Seq** - The order in which the duplicate was found during the duplicate search.
- **First Name** - First Name of the Customer.
- **Last Name** - Last Name of the Customer.
- **Address Line 1** - Line 1 of the Customer's primary street address.
- **City** - City of the Customer's primary address.
- **State** - State or province of the Customer's primary address.
- **Postal Code** - Postal Code or ZIP Code of the Customer's primary address.

View Duplicate Differences

To view the differences between duplicate Customer records, click the duplicate in the duplicate List. A Duplicate Set Customer Differences Window opens.

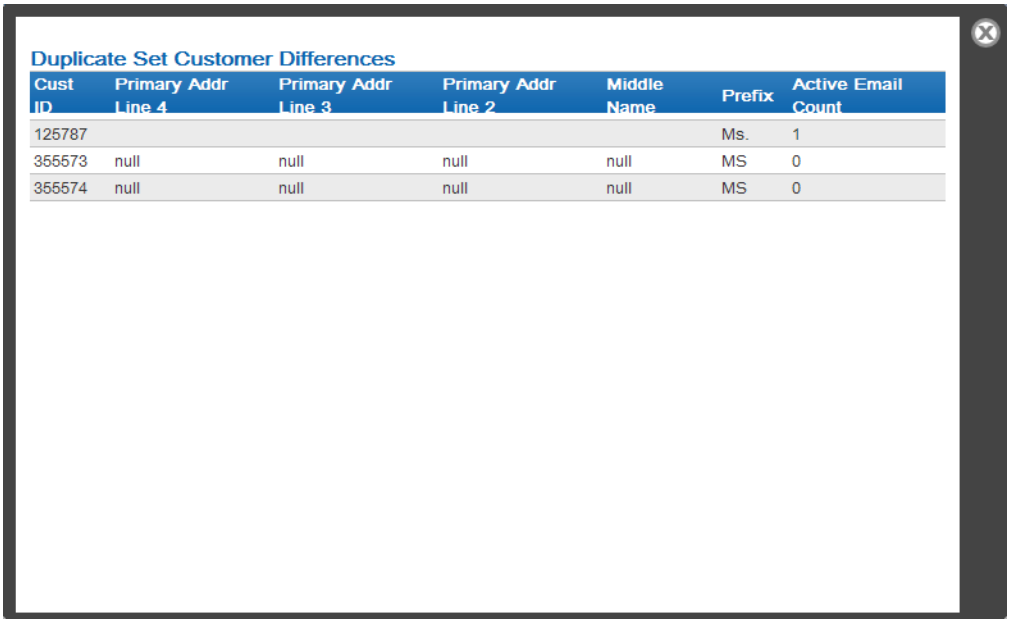


Figure 4-4: Duplicate Set Customer Differences Window

This Window displays the Customer ID for each Customer record in the duplicate, as well as each field and value in each Customer record that differs between the Customer records in the duplicate.

Approve Duplicates

To indicate that the duplicates found by the selected Duplication Strategy should be merged:

1. Select **APPROVE** from the Customer Merge Review Actions Menu.

   A confirmation window opens.

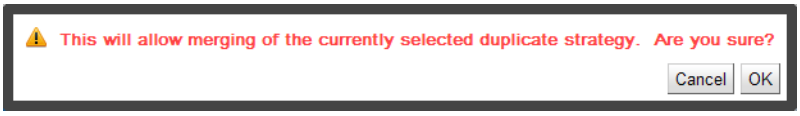


Figure 4-5: Confirmation Window

2. Click **OK** to approve the duplicates for merge.

   The duplicates found by the currently selected Duplicate Strategy are approved for merge. The duplicates will be merged during the next run of the Duplicate Merge job.

Disallow Duplicate Merges

To indicate that the duplicates found by the selected Strategy should NOT be merged:

1. Select **CLEAR** from the Customer Merge Review Actions Menu.

   A confirmation window opens.

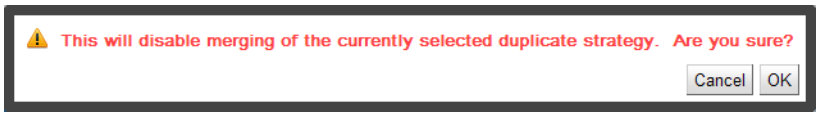


Figure 4-6: Confirmation Window

2. Click **OK** to disallow merging for the duplicates.

   The duplicates found by the currently selected Duplicate Strategy will not be merged during the next run of the Duplicate Merge job.

Delete Duplicates

To empty the List of duplicates found by the selected Strategy:

1. Select **DELETE** from the Customer Merge Review Actions Menu.

   A confirmation window opens.

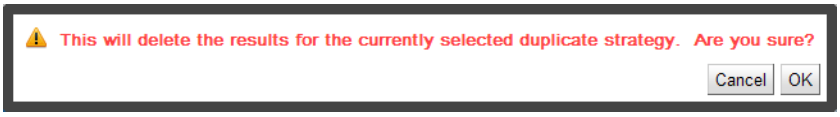


Figure 4-7: Confirmation Window

2. Click **OK** to empty the List of duplicates for the selected Duplicates Strategy.

   The duplicates previously found by the currently selected Duplicate Strategy will be deleted from the system. These duplicates must be found again by another Duplicate Search job before they can be reviewed and approved for merge.

CHAPTER 5

Customer Gift Registry

Overview

The Customer Gift Registry allows a person to select items that they would like to receive—usually for some special event, such as a wedding or baby shower. Customers can then access the gift registry and purchase registry items for the recipient. The Gift Registry tracks the items that have been purchased for the recipient, and which desired items are still available.

About This Chapter

This chapter contains the following information:

- "Customer Gift Registry" on page 172 describes the Customer Gift Registry page.
- "Customer Gift Registry List" on page 174 describes the List of Customer Gift Registries returned by a Gift Registry Lookup.
- "Registry Information Window" on page 176 describes the information and actions available in the Registry Information Window.
- "Gift Registry Print" on page 178 provides information about the Gift Registry Print page.
- "Create a Customer Gift Registry" on page 180 provides the procedure for creating a Customer Gift Registry.
- "Edit a Customer Gift Registry" on page 177 describes how to update an existing Customer Gift Registry.

Customer Gift Registry

Use the Customer Gift Registry page to locate and update a Gift Registry.

Gift Registry Lookup

To look up a Gift Registry in Relate:

1. Use the **Customer->Customer Gift Registry** menu option, or select the **Customer Gift Registry** Link on the Main Page to open the Customer Gift Registry page.

   The Customer Gift Registry lookup page opens.

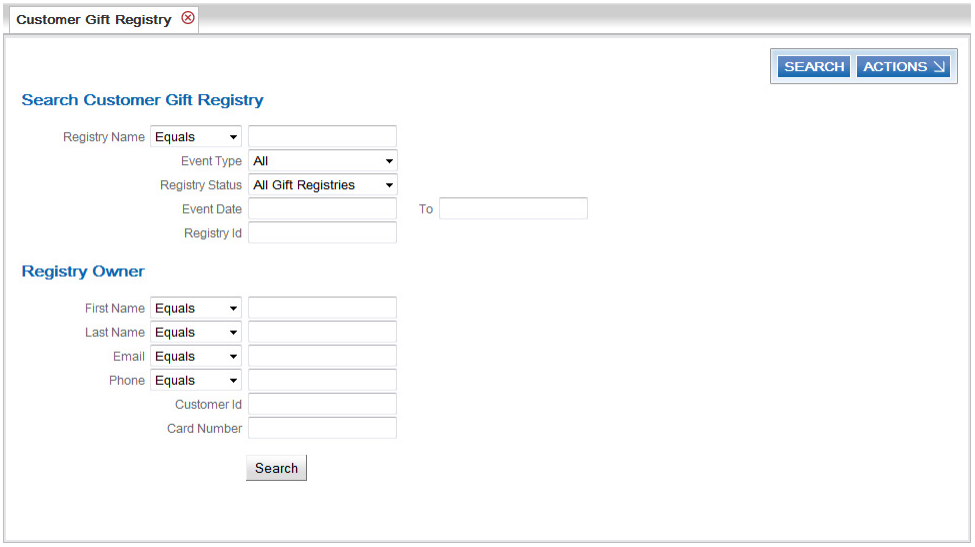


Figure 5-1: Customer Gift Registry Lookup Page

2. Enter the search information for the Gift Registry:



To retrieve all the active Gift Registries in the system, select **SEARCH** *without entering any search criteria.*

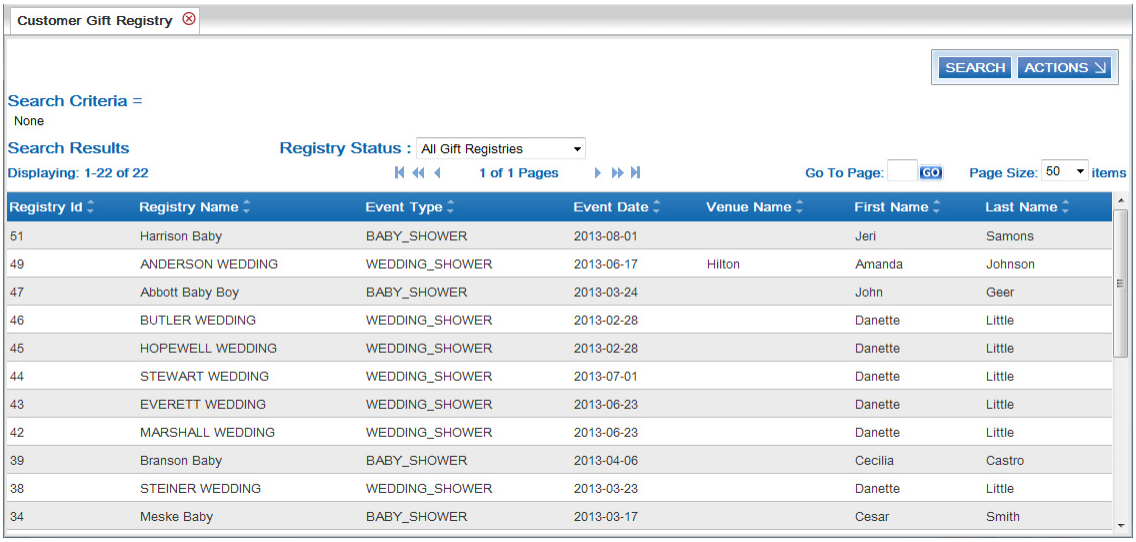
To clear the search fields and restore default selections in the search page, click **CLEAR SEARCH** *in the Actions Menu.*

- **Search Customer Gift Registry** - This section contains fields used to search for properties of the Gift Registries themselves.
  - **Registry Name** - Name of the Registry (uses a Text Field with a Matching Rule Menu).
  - **Event Type** - Type of event for which the Registry was created (uses a Text Field with a Matching Rule Menu).
  - **Registry Status** - A Selection Menu for the current status of the Registry.
  - **Event Date** - Either the date on which the event occurs (uses a Calendar Menu) or, by also using the **From** Calendar Menu, a date range within which the event occurs.
  - **Registry Id** - ID of the Registry (uses a Text Field).

- **Registry Owner** - This section contains fields used to search for Gift Registries through a Customer who owns the Registry.
  - **First Name** - First name of the Registry owner (uses a Text Field with a Matching Rule Menu).
  - **Last Name** - Last name of the Registry owner (uses a Text Field with a Matching Rule Menu).
  - **Email** - Registry owner's email address (uses a Text Field with a Matching Rule Menu).
  - **Phone** - Registry owner's phone number (uses a Text Field with a Matching Rule Menu).
  - **Customer Id** - ID of the Customer who owns the Registry (uses a Text Field).
  - **Card Number** - Number for the Card associated with the Customer (uses a Text Field).

3. Click the **Search** button.

   Relate displays a List of Registries matching the entered search criteria.

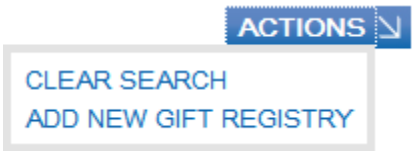


Registry Id	Registry Name	Event Type	Event Date	Venue Name	First Name	Last Name
51	Harrison Baby	BABY_SHOWER	2013-08-01		Jeri	Samons
49	ANDERSON WEDDING	WEDDING_SHOWER	2013-06-17	Hilton	Amanda	Johnson
47	Abbott Baby Boy	BABY_SHOWER	2013-03-24		John	Geer
46	BUTLER WEDDING	WEDDING_SHOWER	2013-02-28		Danette	Little
45	HOPEWELL WEDDING	WEDDING_SHOWER	2013-02-28		Danette	Little
44	STEWART WEDDING	WEDDING_SHOWER	2013-07-01		Danette	Little
43	EVERETT WEDDING	WEDDING_SHOWER	2013-06-23		Danette	Little
42	MARSHALL WEDDING	WEDDING_SHOWER	2013-06-23		Danette	Little
39	Branson Baby	BABY_SHOWER	2013-04-06		Cecilia	Castro
38	STEINER WEDDING	WEDDING_SHOWER	2013-03-23		Danette	Little
34	Meske Baby	BABY_SHOWER	2013-03-17		Cesar	Smith

Figure 5-2: Customer Gift Registry Search Results

Actions Menu

The Actions Menu for the Customer Gift Registry search page provides the following options:



- **CLEAR SEARCH** - Clear the search fields and restore defaults.
- **ADD NEW GIFT REGISTRY** - Create a Customer Gift Registry using the Customer Gift Registry Wizard.

Customer Gift Registry List

The Customer List is accessed through the Gift Registry Lookup process.

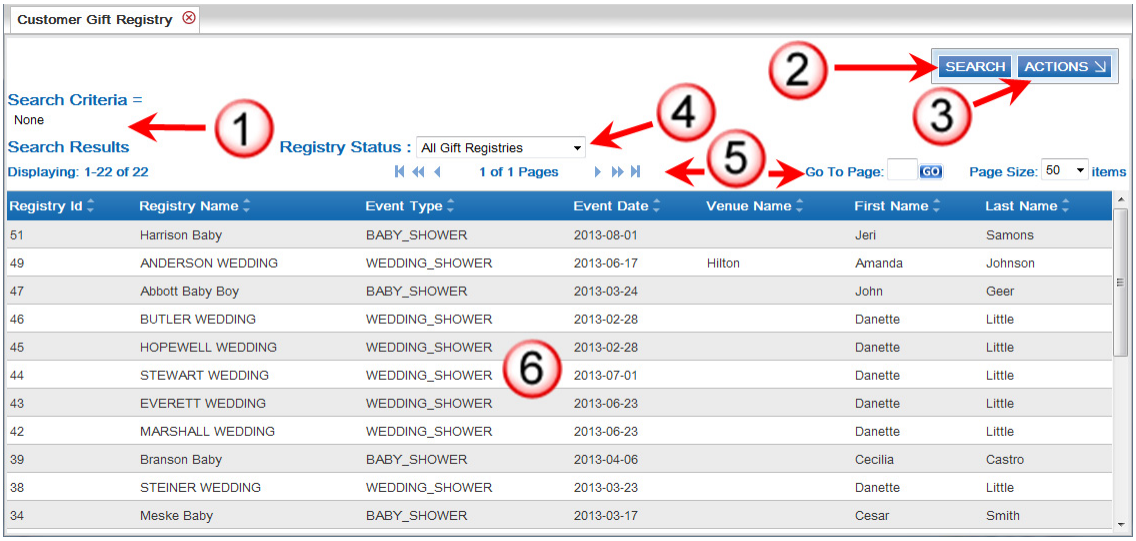


Figure 5-3: Customer Gift Registry List

Table 5-1: *Customer Gift Registry List Page Key*

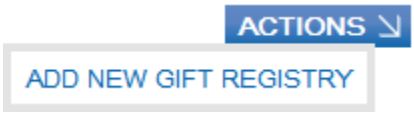
Item	Description
1	**Search Criteria** - Displays the search criteria used for the search results displayed in the List.
2	**Search Button** - Click to return to the Customer Gift Registry page and perform another search.
3	**Actions Menu** - Click to open a menu of actions that can be performed in the Customer Gift Registry List page. See "Actions Menu" on page 175 for more information.
4	**Filter Menu** - Select criteria in the Selection Menu to view a subset of the Gift Registries in the List.
5	**Page Navigation** - Page Navigation for the List.

Table 5-1: *Customer Gift Registry List Page Key (continued)*

Item	Description
6	**Customer Gift Registry List** - A List of Customer Gift Registries currently in the system. The List displays a limited number of Customer Gift Registries; use the Filter Menus to narrow down the List and locate a certain Registry. This List includes the following information for each Customer Gift Registry: ■ **Registry Id** - Unique identifier for the Customer Gift Registry. ■ **Registry Name** - Name of the Registry ■ **Event Type** - Type of event for which the Registry was created. ■ **Event Date** - Date of the event. ■ **Venue Name** - Name of the location where the event is taking place. ■ **First Name** - First name of the Customer who owns the Registry. ■ **Last Name** - Last name of the Customer who owns the Registry.

Actions Menu

The Actions Menu for the Customer Gift Registry List page provides the following options:



- ❑ **ADD NEW GIFT REGISTRY** - Create a Customer Gift Registry using the Customer Gift Registry Wizard.

Open a Customer Gift Registry

To open a Customer Gift Registry, click the Registry in the Customer Gift Registry List. The Registry will open in a Registry Information Window.

Registry Information Window

The Registry Information Window displays the following information:

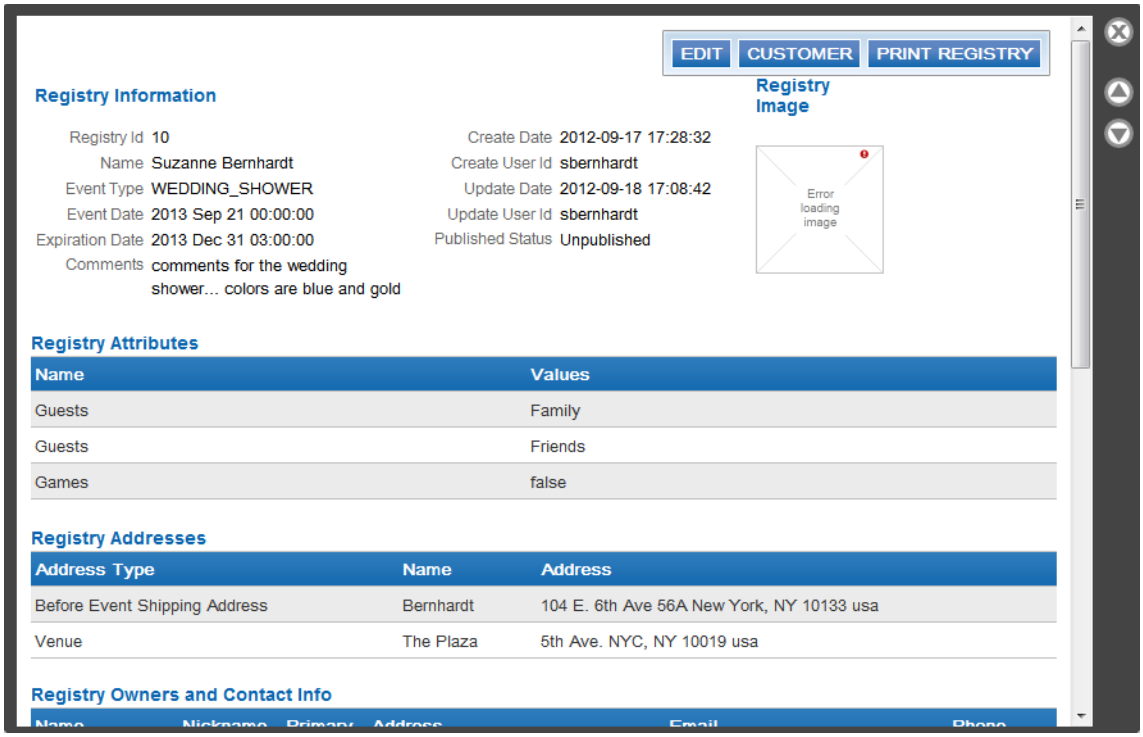


Figure 5-4: Registry Information Window

- **Registry Id** - ID of the Registry.
- **Name** - Name of the Registry.
- **Event Type** - Type of event for which the Registry was created.
- **Event Date** - Date of the event.
- **Expiration Date** - Date on which the Registry expires.
- **Comments** - Additional comments.
- **Create Date** - Date the Registry was created.
- **Create User Id** - ID of the User who created the Registry.
- **Update Date** - Most recent date on which the Registry was updated.
- **Update User Id** - ID of the User who most recently updated the Registry.
- **Published Status** - Indicates whether the Registry is publicly available.
- **Registry Image** - Image associated with the Registry.
- **Registry Attributes** - This List displays information about the Attributes assigned to the Registry. The following information is displayed for each Attribute:
  - **Name** - The name of the Attribute.
  - **Values** - The value(s) assigned to the Attribute.

- **Registry Addresses** - This List displays information about the address associated with the Registry. The following information is displayed for each address:
  - **Address Type** - The type of address.
  - **Name** - Name of the location.
  - **Address** - The address of the location.
- **Registry Owners and Contact Info** - This List displays information about the Customers who own the Registry. The following information is displayed for each Registry owner:
  - **Name** - Customer name.
  - **Nickname** - Nickname for the owner.
  - **Primary** - Indicates whether this Customer is the primary owner of the Registry.
  - **Address** - Customer address.
  - **Email** - Customer email address.
  - **Phone** - Customer phone number.
- **Registry Items** - This List displays information about the Items in the Registry. Click on an Item to view it in an Item Details Window. The following information is displayed for each Item:
  - **Item Id** - ID of the Item.
  - **Description** - A description of the item.
  - **Desired Quantity** - Requested quantity.
  - **Purchased Quantity** - Quantity purchased.

Open Registry in a Customer Record

To open a Registry in the Customer record for the primary owner, click the **CUSTOMER** button in the upper-right corner of the Registry Information Window. The Registry opens in the Gift Registry Visualizer.

Edit a Customer Gift Registry

To edit a Gift Registry:



To make changes to the Items in a Gift Registry, it may be easier to makes changes through the Gift Registry Visualizer for the primary owner's Customer record. See "Open Registry in a Customer Record" on page 177 for instructions on opening the Gift Registry Visualizer.

The following procedures are available in the Gift Registry Visualizer:

- "Add an Item" on page 148
- "Change the Desired Quantity of an Item" on page 149
- "Remove an Item from the Registry" on page 149

1. Click the **EDIT** button in the Registry Information Window.

The Gift Registry opens in a Create a Customer Gift Registry Wizard.

2. Update the Gift Registry.
   - ❑ Use Wizard Navigation to move through the Gift Registry.
   - ❑ Make any necessary changes.
   - ❑ Click **save** when you are finished making changes. The Gift Registry will be saved and Relate will return to the Customer Gift Registry List.
   - ❑ Click **cancel** to discard the changes, cancel the operation, and return to the Customer Gift Registry List.

Open a Registry for Printing

To open a Gift Registry for printing, click the **PRINT REGISTRY** button in the Registry Information Window. The Gift Registry opens in the Gift Registry Print page.

Gift Registry Print

The Gift Registry Print page displays Registry information suitable for a printout that can be given to a Customer. The Customer can then use the printout to locate Items on the Registry. This page displays the following information:

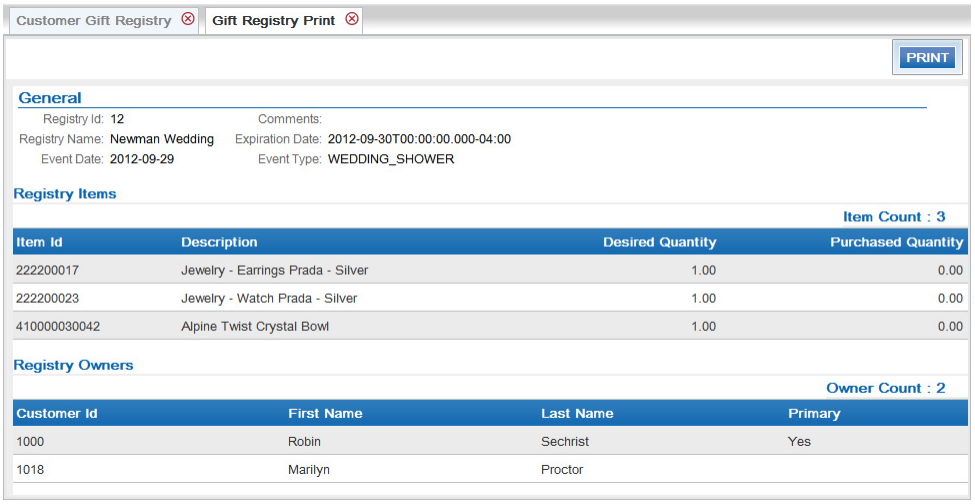


Figure 5-5: Gift Registry Print

- **General** - General information about the Registry. This section displays the following information:
  - ❑ **Registry Id** - ID of the Registry.
  - ❑ **Registry Name** - Name of the Registry.
  - ❑ **Event Date** - Date on which the event occurs.
  - ❑ **Comments** - Comments about the Registry.
  - ❑ **Expiration Date** - Date on which the Registry expires.
  - ❑ **Event Type** - Type of event.

- **Registry Items** - This List displays the Items that are entered into the Registry. This List displays the following information for each Item:
  - **Item Id** - ID of the Item.
  - **Description** - Description of the Item.
  - **Desired Quantity** - Requested quantity of the Item.
  - **Purchased Quantity** - Quantity of the Item that has been purchased so far.
- **Registry Owners** - This List displays information about the Customers who own the Registry. This List displays the following information for each owner:
  - **Customer Id** - ID of the Customer.
  - **First Name** - Customer first name.
  - **Last Name** - Customer last name.
  - **Primary** - A value of Yes indicates the primary Registry owner.

Print a Gift Registry

To print a Gift Registry:

1. Open a Customer Gift Registry in a Registry Information Window.
2. In the Registry Information Window, click the **PRINT REGISTRY** button.

   The Registry opens in the Gift Registry Print page.
3. Click the **PRINT** button in the top-right corner of the Gift Registry Print page.

   After you click the **PRINT** button, the printing procedure will follow the rules specific to your browser and/or operating system. See the appropriate documentation for more information.

Create a Customer Gift Registry

To create a Customer Gift Registry in Relate:

1. From Customer Gift Registry List Actions Menu select **ADD NEW GIFT REGISTRY**.

   The Create a Gift Registry Wizard opens.

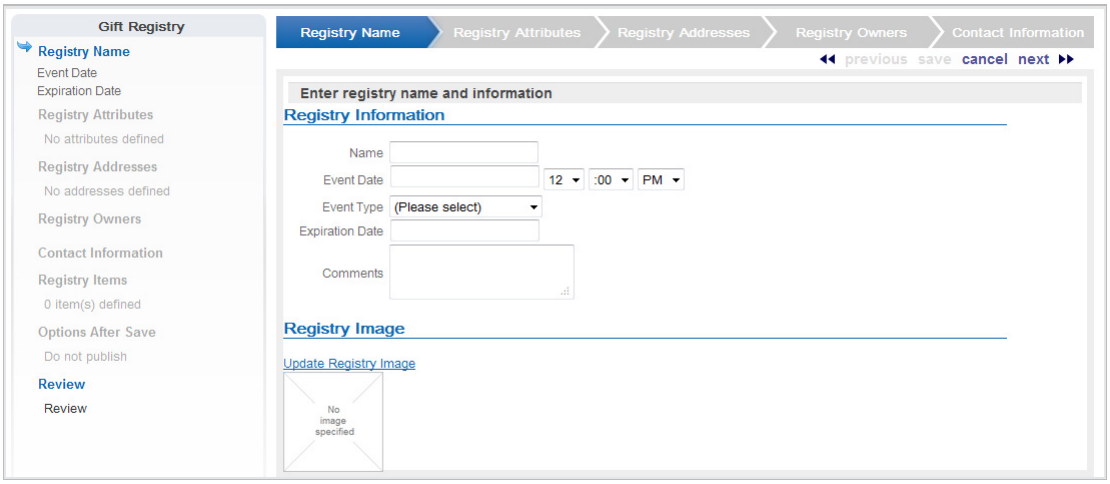


Figure 5-6: Create Customer Gift Registry Wizard

2. In the Registry Name step, enter the basic information for the Registry:
   - ❑ **Name** - Name of the Registry.
   - ❑ **Event Date** - Use the Calendar Menu and Time Menus to select the date and time when the event is taking place.
   - ❑ **Event Type** - Use this Selection Menu to select the type of event.
   - ❑ **Expiration Date** - Use the Calendar Menu and Time Menus to select the date and time when the Registry expires.
   - ❑ **Comments** - Additional comments for the Registry.
3. If necessary, add or update an image for the Registry. To add or update an image:
   - **a.** Click the **Update Registry Image** Link.

     The Update Image Window opens.

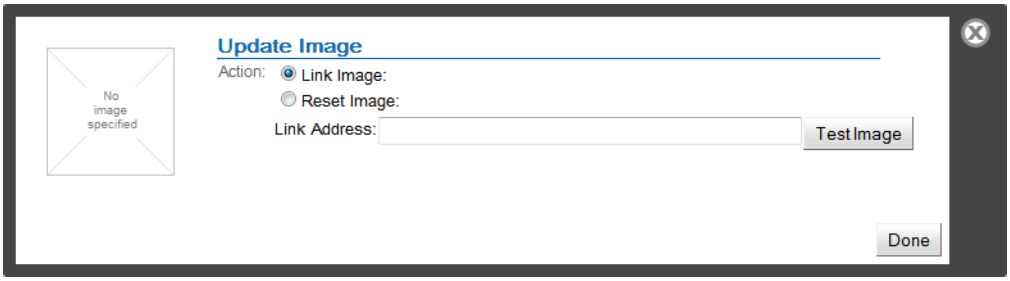


Figure 5-7: Update Image Window

b. Enter the URL for the image in the **Link Address** Text Field.

c. Click the **Test Image** button to test the URL and the image.

d. If the image imports correctly, click the **Done** button to import the image into the Registry. The image is displayed in the Registry Image section.



To exit without importing an image, click the **X** ( ) in the top-right corner.

4. Click **next** to continue with the next step.

The Registry Attributes step opens.

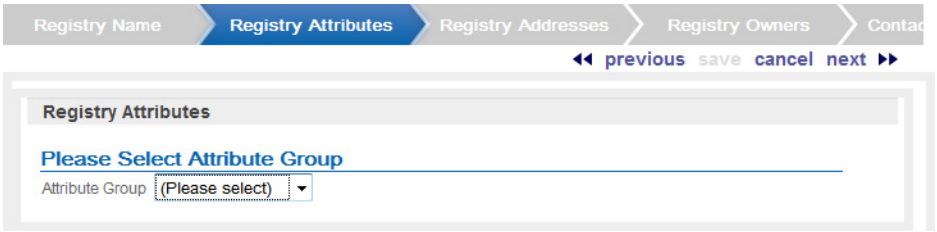


Figure 5-8: Registry Attributes Step

5. Use the **Attribute Group** Selection Menu to select the Attribute Group to use for the Registry.

The Attributes for the selected Attribute Group are displayed.

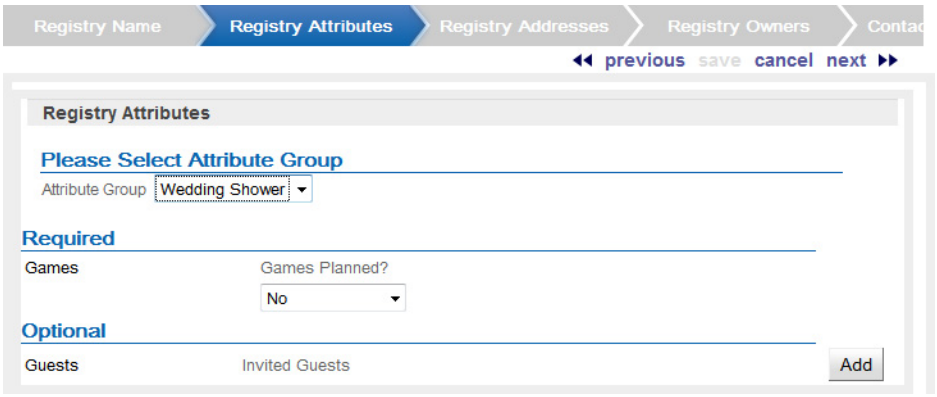


Figure 5-9: Registry Attributes Step - Attribute Group Selected

6. Select or enter the configuration values for each of the **Required** Attributes.

7. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

8. Click **next** to continue with the next step.

   The Registry Addresses step opens.

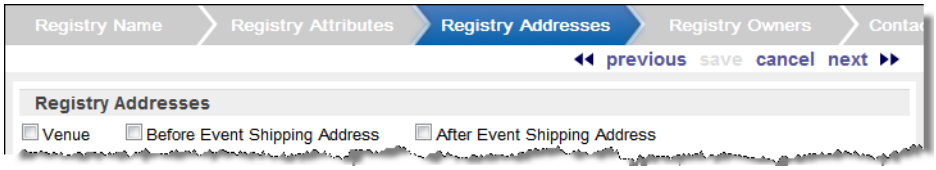


Figure 5-10: Registry Addresses Step

9. Select the Check Box for each type of address to add to the Registry.
10. Address fields open for each address type selected.

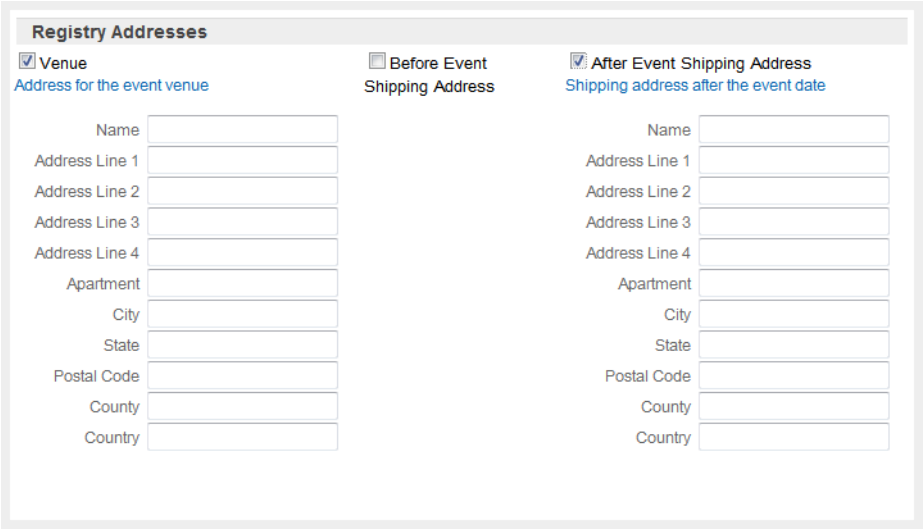


Figure 5-11: Registry Address Fields Opened

11. Enter the address information for each address:
    - **Name** - Name of the location.
    - **Address Line 1** - Line 1 of the address.
    - **Address Line 2** - Line 2 of the address.
    - **Address Line 3** - Line 3 of the address.
    - **Address Line 4** - Line 4 of the address.
    - **Apartment** - Address apartment.
    - **City** - Address city.
    - **State** - Address state/province.
    - **Postal Code** - Postal/ZIP code for the address.
    - **County** - Address county.
    - **Country** - Address country.
12. Click **next** to continue with the next step.

The Registry Owners step opens.

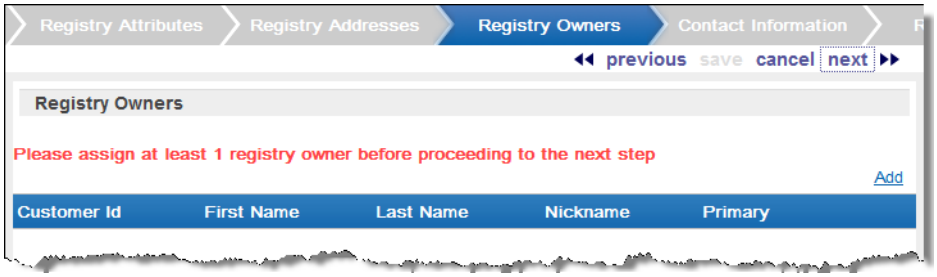


Figure 5-12: Registry Owners Step

Use the following procedure to add a Customer as a Registry owner:

> *If you opened the Wizard through a Customer's Gift Registry screen, the Customer will be entered as an owner.*

a. Click the **Add** Link.

A Search Customer Window opens.



Figure 5-13: Search Customer Window

b. Use the Search Customer Window to enter search information, then click the **Search** button to search for Customers matching the search criteria.

A List of search results is displayed.

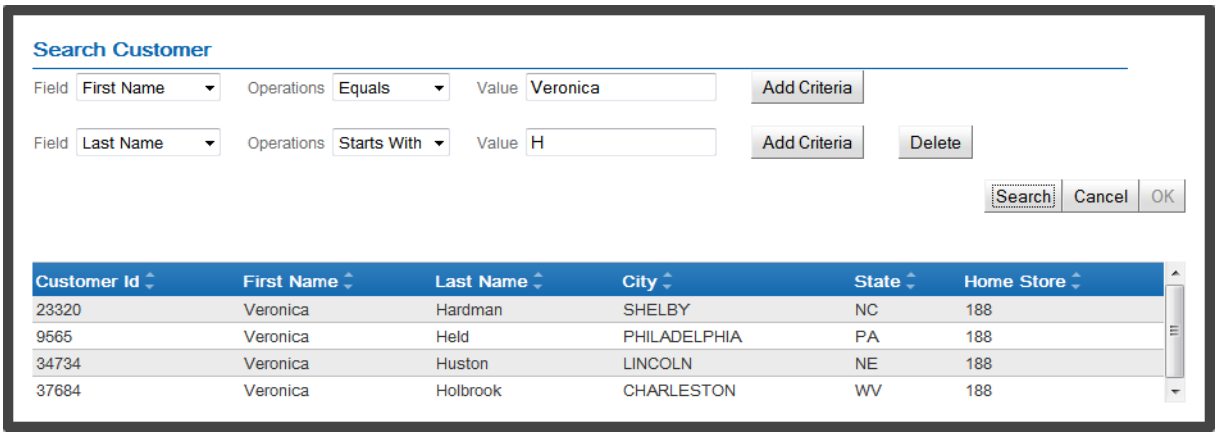


Figure 5-14: Customer Search Results

c. Click the Customer to add as an owner.

d. Click the **OK** button.

e. The Window closes and the Customer is added to the List of Registry owners.

Customer Id	First Name	Last Name	Nickname	Primary
23320	Veronica	Hardman		◉

Figure 5-15: Registry Owner Added

f. If necessary, enter a Nickname for the owner(s).

g. To add another Customer, repeat steps a-f.

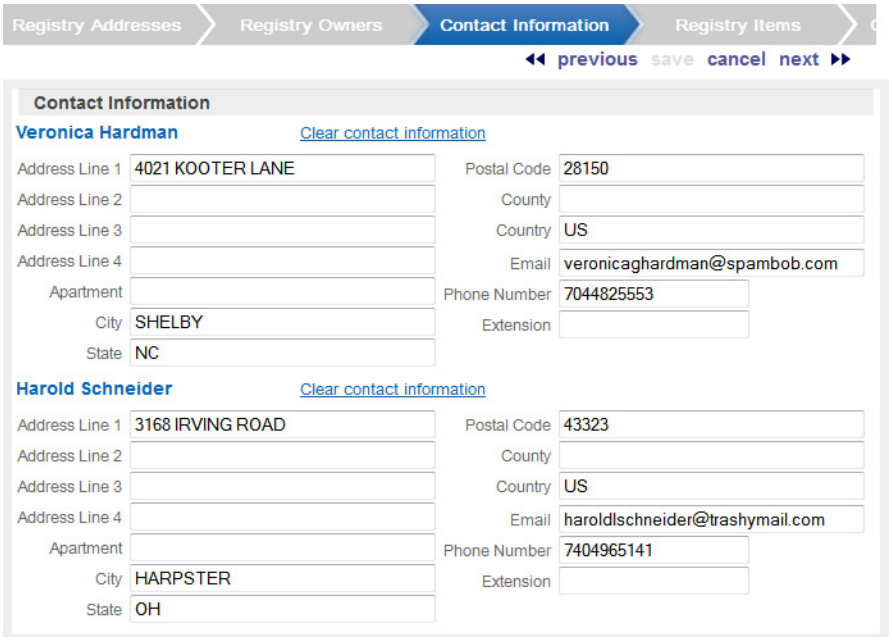
13. If more than one owner was added to the Registry, use the **Primary** Radio Buttons to select the primary owner of the Registry.

14. If necessary, delete an owner by selecting the owner to delete, then selecting the **Delete** button.

The owner is deleted from the Registry.

15. Click **next** to continue with the next step.

The Contact Information step opens.



The contact information for each owner is automatically populated with the primary address, email, and telephone number in the owner's Customer record.

16. If necessary, make changes to the owner contact information.

To clear all the fields for an owner, click the **Clear contact information** Link.

Updates to the contact information will not update a Customer record. The contact information is specific to the Registry.

17. Click **next** to continue with the next step.

The Registry Items step opens.

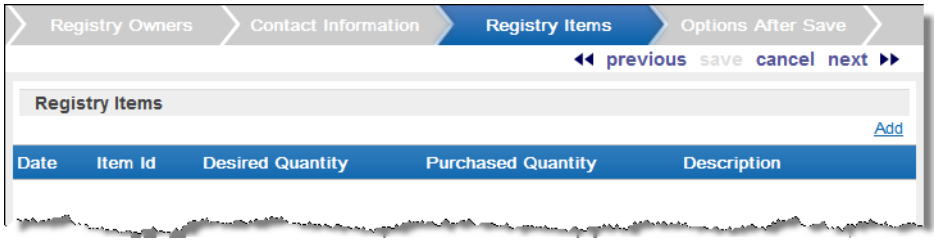


Figure 5-16: Registry Items Step

18. To add an item to the Registry:

a. Click the **Add** Link.

b. The Item Entry Window opens.



Figure 5-17: Item Entry Window

Enter all or part of the Item ID in the **Filter Criteria** field, or leave the field blank to retrieve all the Items in the system.

c. Click the **Search** button.

A List of Items matching the entered search criteria is displayed.

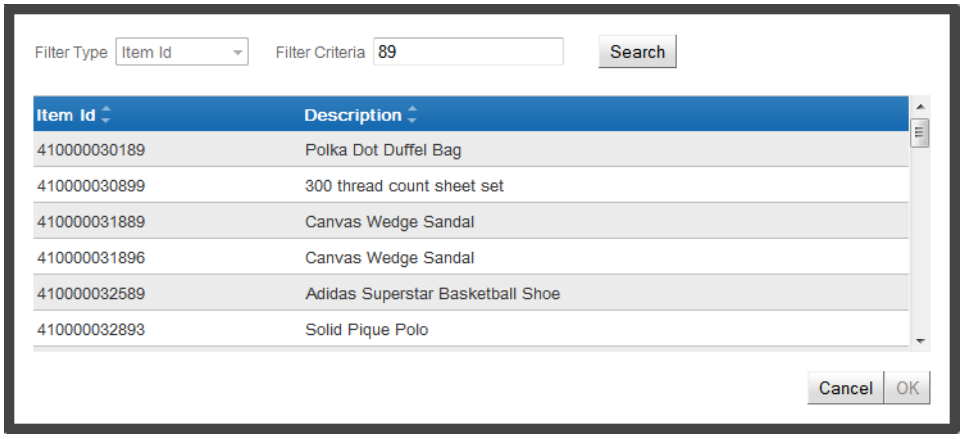


Figure 5-18: Item Search Results

d. Click to select the Item to add to the Registry.

e. Click the **OK** button.

f. The Item Entry Window closes and the Item is added to the Registry.

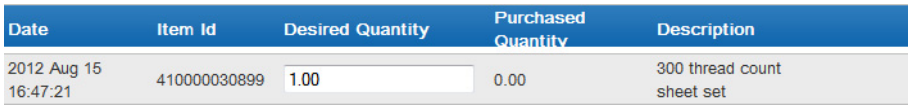


Figure 5-19: Item Added

g. If necessary, update the **Desired Quantity** of the Item.

h. Repeat steps a-g for each Item to add to the Registry.

19. Click **next** to continue with the next step.

The Options After Save step opens.

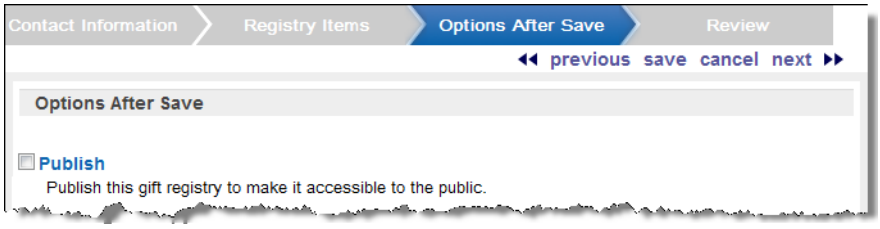


Figure 5-20: Options After Save Step

20. To publish the Registry immediately upon saving, click to enter a check mark (☑) in the **Publish** Check Box, or leave the Check Box empty (☐) to keep the Registry unpublished until later.

21. Click **next** to continue with the next step.

The Review step opens.

22. Review the entered information to ensure that it is correct.

- ❑ Click **save** to save the Gift Registry with the current settings and return to the Customer Gift Registry List.
- ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
- ❑ Click **cancel** to discard the changes and return to the Customer Gift Registry List.

CHAPTER 6

Segments

Overview

Customer Segments organize Customers into groups related by certain, specified criteria. These Segments can be used to define the Segment/Target Eligibility rules used by various Relate elements.

There are three types of Customer Segments:

- **Unstratified** - Segments in which Customers belonging to the segment are not subdivided into different groups; i.e. the Customers within the Segment are not differentiated into subgroups by the Segment. These Segments are described in "Unstratified Segments" on page 188.
- **Stratified** - Segments in which the Customers belonging to the segment are divided into stratified subgroups (or levels) determined by certain criteria, such as year-to-date total purchases, Customer age, annual income, or some other criteria. These Segments are described in "Stratified Segments" on page 203.
- **Manual** - Segments created by selecting Customers one-by-one. Associates can use Manual Segments to create "Favorite Customer" lists. These Segments are described in "Manual Segments" on page 223.

Unstratified Segments

Unstratified Segments define groups of Customers. The Customers within an Unstratified Segment are not differentiated into separate groups.

Unstratified Segment List

The Unstratified Segment List page is opened using the **Segment->Unstratified Segment** menu option, or by clicking the **Unstratified Segment** Link on the Main Page.

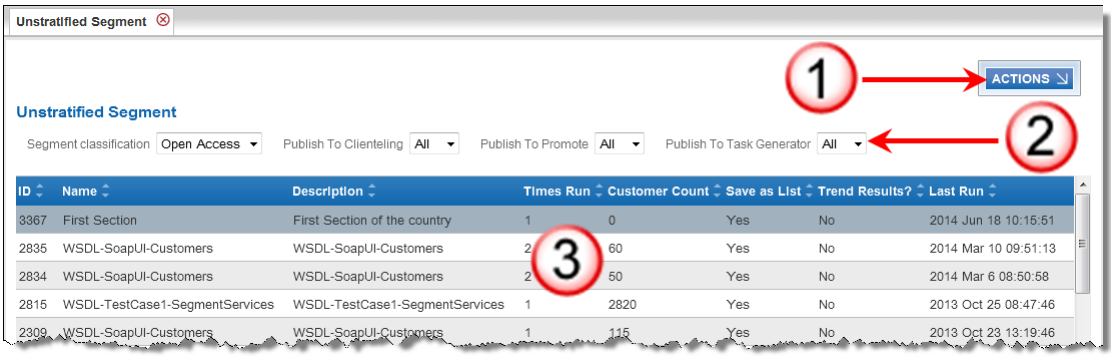


Figure 6-1: Unstratified Segment List

Table 6-1: *Unstratified Segment List Page Key*

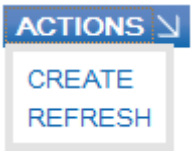
Item	Description
1	**Actions Menu** - Click to open a menu of actions that can be performed in the Unstratified Segment List page. See "Actions Menu" on page 189 for more information.
2	**Filter Menus** - Select criteria in the Filter Menus to view a subset of the Segments in the Unstratified Segment List. See "Filter Menus" on page 189 for more information.

Table 6-1: *Unstratified Segment List Page Key (continued)*

Item	Description
3	**Unstratified Segment List** - A List of Unstratified Segments currently in the system. The List displays a limited number of Segments; use the Filter Menus to narrow down the List and locate a certain Segment. This List includes the following information for each Segment: ■ **ID** - Unique ID for the Segment. ■ **Name** - Name of the Segment. ■ **Description** - Description of the Segment. ■ **Times Run** - The number of times the Segment has been run. ■ **Customer Count** - Number of Customers in the Segment. ■ **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. If this option is set to **No**, the Segment only creates a count of the Customers that meet the criteria. ■ **Trend Results** - Indicates whether trend results are saved for the Segment. ■ **Last Run** - The most recent date and time on which the Segment was run.

Actions Menu

The Actions Menu in the Unstratified Segment List contains the following options:



- **CREATE** - Create an Unstratified Segment (see "Create Unstratified Segment" on page 194).
- **REFRESH** - Refresh the List, displaying any updates to the Unstratified Segments.

Filter Menus

The Unstratified Segment List includes the following filter menus:



Figure 6-2: Unstratified Segment List Filter Menus

- **Segment Classification** - Filters the List by Segment Classification.

  This filter has the following options:

  - ❑ **Private** - **[DEFAULT]** Display only private Segments.
  - ❑ **Public** - Display only public Segments.
  - ❑ **Open Access** - Display only open access Segments.
- **Publish to Clienteling** - Filters the List by whether the Segments have been published to Clienteling. *This Selection Menu is only displayed if the Show Clienteling Customer Search Menu configuration is enabled in Conflate*.

> **See also:** The *Relate Configuration Guide* for more information about Conflate.

This filter has the following options:

- **All** - **[DEFAULT]** Do not filter the List by Clienteling status.
- **Yes** - Display only those Segments that are published to Clienteling.
- **No** - Display only those Segments that are not published to Clienteling.

- **Publish to Promote** - Filters the List by whether the Segments have been made available to Promote. *This Selection Menu is only displayed if the Enable Promote Integration configuration is enabled in Conflate*.

> **See also:** The *Relate Configuration Guide* for more information about Conflate.

This filter has the following options:

- **All** - **[DEFAULT]** Do not filter the List by Clienteling status.
- **Yes** - Display only those Segments that are published to Promote.
- **No** - Display only those Segments that are not published to Promote.

- **Publish to Task Generator** - Filters the List by whether the Segments can be used to create Tasks. *This Selection Menu is only displayed if the Enable Task Generator configuration is enabled in Conflate*.

> **See also:** The *Relate Configuration Guide* for more information about Conflate.

This filter has the following options:

- **All** - **[DEFAULT]** Do not filter the List by whether it generates Tasks.
- **Yes** - Display only those Segments that generate Tasks.
- **No** - Display only those Segments that do not generate Tasks.

Open an Unstratified Segment

To open a Unstratified Segment, click the Segment in the List. The Segment opens in an Unstratified Segment Window.

Unstratified Segment Window

The Unstratified Segment Window displays information about the Unstratified Segment opened in the Window, and provides the ability to perform actions on the Unstratified Segment.

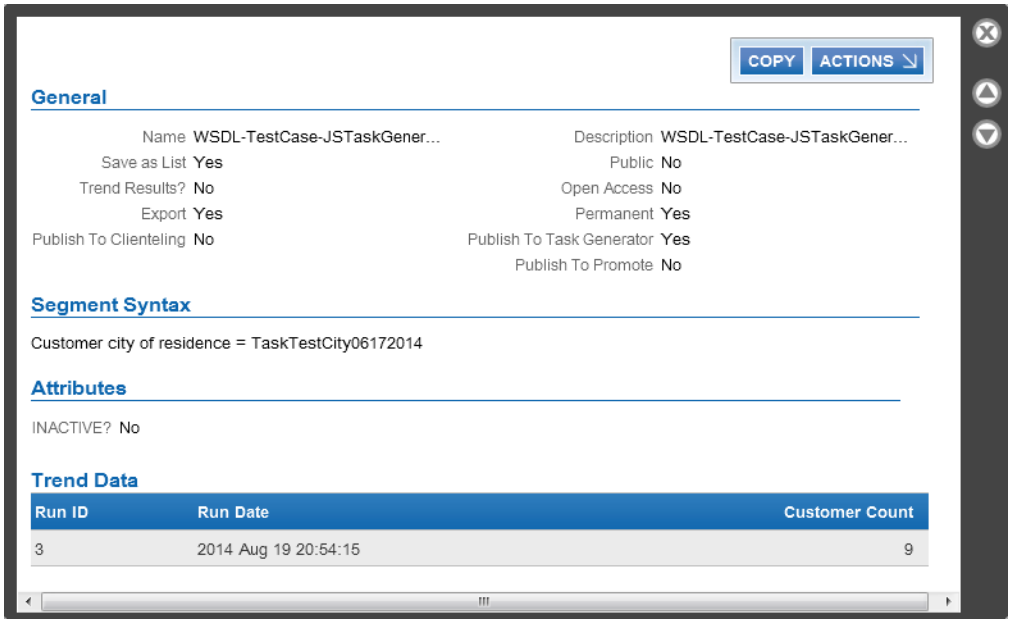


Figure 6-3: Unstratified Segment Window

The following information is displayed in the Unstratified Segment Window:

- **General** - General information about the Segment. This area includes the following information:
  - **Name** - Name of the Segment.
  - **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. If this option is set to **No**, the Segment only creates a count of the Customers that meet the criteria.
  - **Trend Results?** - Indicates whether the results of the Segment run are kept to provide trend information about the Segment.
  - **Export** - Indicates whether the Segment results are automatically exported after the Segment Query is run.
  - **Publish to Clienteling** - Indicates whether the Segment has been made available to the Clienteling module.
  - **Description** - A description of the Segment.
  - **Public** - Indicates whether the Segment is Public.
  - **Open Access** - Indicates whether the Segment has Open Access.
  - **Permanent** - Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job.

- **Publish to Task Generator** - Indicates whether the Segment has been made available to the Task Generator Job.
- **Publish to Promote** - Indicates whether the Segment has been made available to Promote.

- **Segment Syntax** - The criteria that a Customer must meet to be included in the Segment.
- **Segment Messages** - For Public Segments with Open Access, this List displays the messages configured for the Segment. This List displays the following information:
  - **Language** - ID code for the language.
  - **POS Display** - Text displayed to the cashier using the POS.
  - **Customer Display** - Text shown to the customer on the customer-facing display.
  - **Receipt Display** - Text printed on the receipt.
- **Franchisees** - IDs of the Franchisees, if any, included in the Segment. If Franchisees are assigned, only the Customers assigned to those Franchisees will be included in the Segment.
- **Attributes** - Attributes of the Segment. The following information is displayed for each attribute assigned to the Segment:
  - Name of the attribute.
  - Value(s) assigned to the attribute.
- **Trend Data** - If available, this List displays the Trend results for the Segment. This List displays the following information:
  - **Run ID** - The ID for the Segment run.
  - **Run Date** - Date on which the Segment was most recently run.
  - **Customer Count** - The number of Customers found in the Segment.

Copy Unstratified Segment

In the Unstratified Segment Window, click the **Copy** button to create a copy of the Unstratified Segment in the Create Unstratified Segment Wizard.

A copy of the Unstratified Segment is opened in the Create Unstratified Segment Wizard, with all the same settings and information as the copied Segment.

- Use Wizard Navigation to move through the Segment.
- Make any necessary changes.
- Configure the Schedule Definition (the run schedule is not copied).
- Click **save** when you are finished making changes. The Segment will be saved and Relate will return to the Unstratified Segment List.
- Click **cancel** to discard the changes, cancel the copy operation, and return to the Unstratified Segment List.

For more information about the fields and information to be entered, see "Create Unstratified Segment" on page 194.

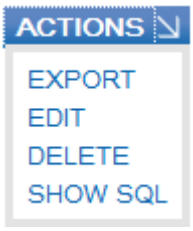
Actions Menu

The Actions Menu in the Unstratified Segment Window has the following options:

> *Depending upon the current status of the Segment, all of the options below may not be available.*

- **EXPORT** - Exports the results after a Segment is run.

  A confirmation prompt opens, asking whether to export the Segment.



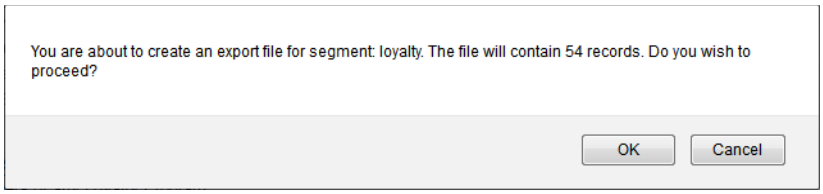


Figure 6-4: Export Confirmation Prompt

  - ❑ Click **OK** to export the Segment and close the prompt.
  - ❑ Click **Cancel** to close the prompt and not export the Segment.

- **EDIT** - Edit the Segment.

  The Segment opens in the Unstratified Segment Wizard. See "Create Unstratified Segment" on page 194 for further information about editing the Segment.

- **DELETE** - Deletes the Segment.

  A confirmation prompt opens, asking whether to delete the segment.

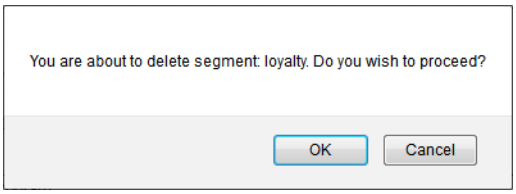


Figure 6-5: Delete Confirmation Prompt

  - ❑ Click **OK** to delete the Segment, and close the prompt and the Unstratified Segment Window.
  - ❑ Click **Cancel** to close the prompt and keep the Segment in place.

- **SHOW SQL** - Opens a Query Window showing the SQL used by the Segment Query.

The Unstratified Segment Window displays the SQL used to construct the Segment.

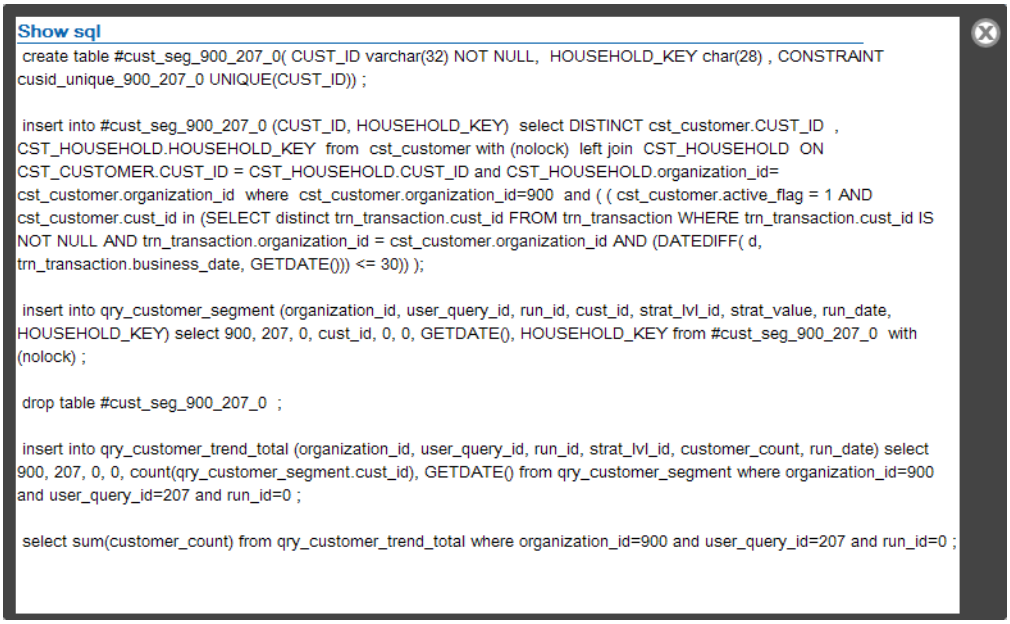


Figure 6-6: Show SQL

Create Unstratified Segment

To create a new Unstratified Segment:

1. In the Unstratified Segment List page, click **Create** in the Actions Menu.

   The Unstratified Segment creation Wizard opens.

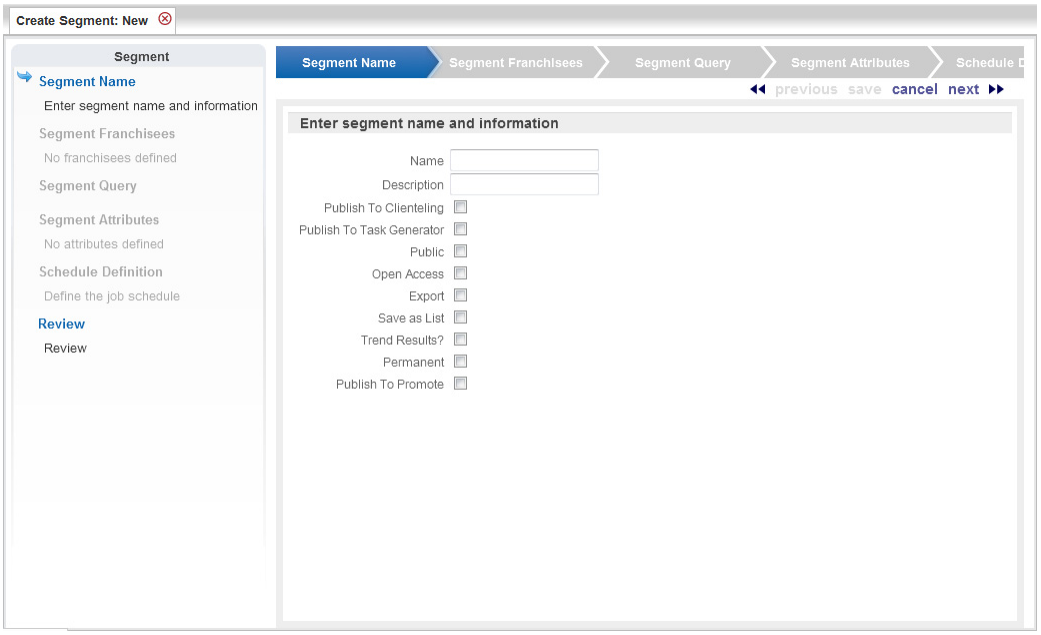


Figure 6-7: Create Unstratified Segment Wizard

2. In the Segment Name step, enter information into the fields:
   - **Name** - The name of the Segment.
   - **Description** - A description of the Segment.
   - **Segment Options** - Use each Check Box to select whether the Segment will have the associated property:
     - **Publish To Clienteling** - Determines whether the Segment will be available in the Clienteling module. See Chapter 3, "Clienteling" on page 161 for more information.



If the **Publish to Clienteling** *option is selected,* **Public**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Open Access**, **Export**, *and* **Publish to Promote** *are automatically unchecked and the Check Boxes are disabled.*

A User must be assigned the Relate_PublishClientelingSegment Role to see this option.

See also: The *Relate Configuration Guide* for more information about Roles.

     - **Publish to Task Generator** - Determines whether tasks will be created for this Segment.



If the **Publish to Task Generator** *option is selected,* **Export**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Public**, **Open Access**, *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

     - **Public** - Determines whether the Segment will be Public.
     - **Open Access** - Determines whether the Segment will have Open Access.



If the **Open Access** *option is selected,* **Public**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Export** *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

     - **Export** - Determines whether the Segment results will be automatically exported after the Segment Query is run.



If the **Export** *option is selected,* **Save as List** *is automatically checked and the Check Box is disabled;* **Open Access** *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

     - **Save as List** - Determines whether a List of matching Customer IDs will be created when the segment is created. If this option is not checked, the Segment will only create a count of the Customers that meet the criteria.

- **Trend Results?** - Determines whether the results of the Segment run will be kept to provide trend information about the Segment.
- **Permanent** - Determines whether the Segment will be kept, even if it meets the criteria for deletion by the housekeeping job.
- **Publish To Promote** - Determines whether the Segment will be made available to Promote.

> *If the* **Publish to Promote** *option is selected,* **Public**, **Export**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Publish to Clienteling** *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

3. When you have finished entering information, click **Next**.

- If Franchisees are enabled in Relate, the Franchisees step opens. Continue with step 4.
- If Franchisees are not enabled in Relate, the Segment Query step opens. Continue with step 6.

4. Configure the Franchisees to be included in the Segment:

- If all Franchisees will be included in the Segment, do not select any Franchisees.
- If only a subset of Franchisees will be included in the Segment, select the Check Box for each Franchisee to be included.
- To select all the current Franchisees (so that any new Franchisees will be excluded from the Segment), click **Select All**.

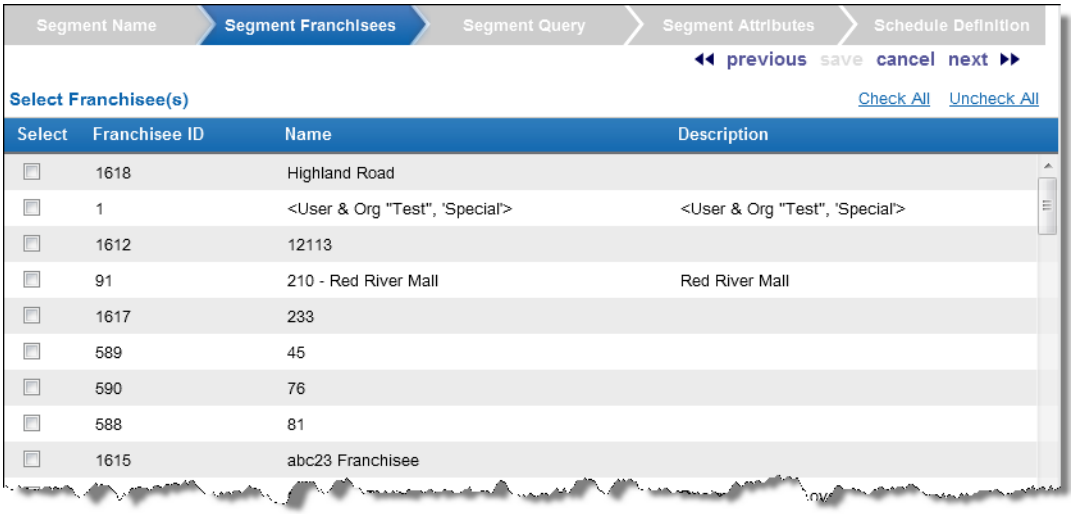


Figure 6-8: Segment Franchisees

5. Click **next** when you are finished.

The Segment Query step opens.

6. Build the Segment Query:

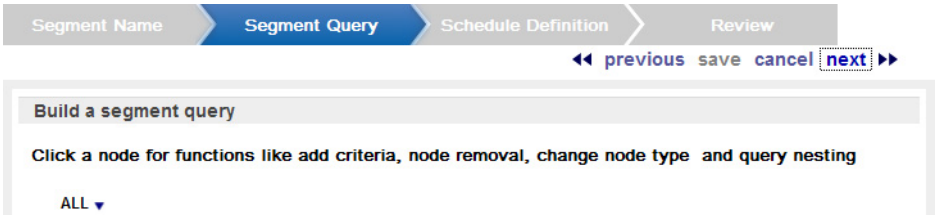


Figure 6-9: Segment Query

a. Click the **ALL** or **ANY** node to open the query menu.

- In an ALL node, a record will only be included in the node if it matches all of the criteria in the subnodes of the current node. Equivalent to a logical AND.
- In an ANY node, a record will be included in the node if it matches any of the criteria in the subnodes of the current node. Equivalent to a logical OR.

b. Select the option to perform:

- **Delete** - Deletes the node (the root node cannot be deleted).

  If the node is not the root node, a confirmation prompt opens.

  Click **OK** to delete the node, or click **Cancel** to close the confirmation prompt and keep the node in place. Return to step a for the remaining nodes.
- **Add Criteria** - Add a new criteria to the ANY or ALL node.

  A Criteria Selection Window opens. Continue with step c.
- **Change to 'ANY'** - Changes an ALL node to an ANY node; return to step a using the changed node.
- **Change to 'ALL'** - Changes an ANY node to an ALL node; return to step a using the changed node.
- **Add 'ALL' branch** - Adds an 'ALL' subnode to the current node.

  To create the rules for this subnode, return to step a using this new node.
- **Add 'ANY' branch** - Adds an 'ANY' subnode to the current node.

  To create the rules for this subnode, return to step a using this new node.

c. In the Criteria Selection Window, click a criteria group to expand its List of criteria, or click **Expand** to open all the criteria groups. See Appendix A: "Segment Queries"

on page 687 for more information about criteria group organization.

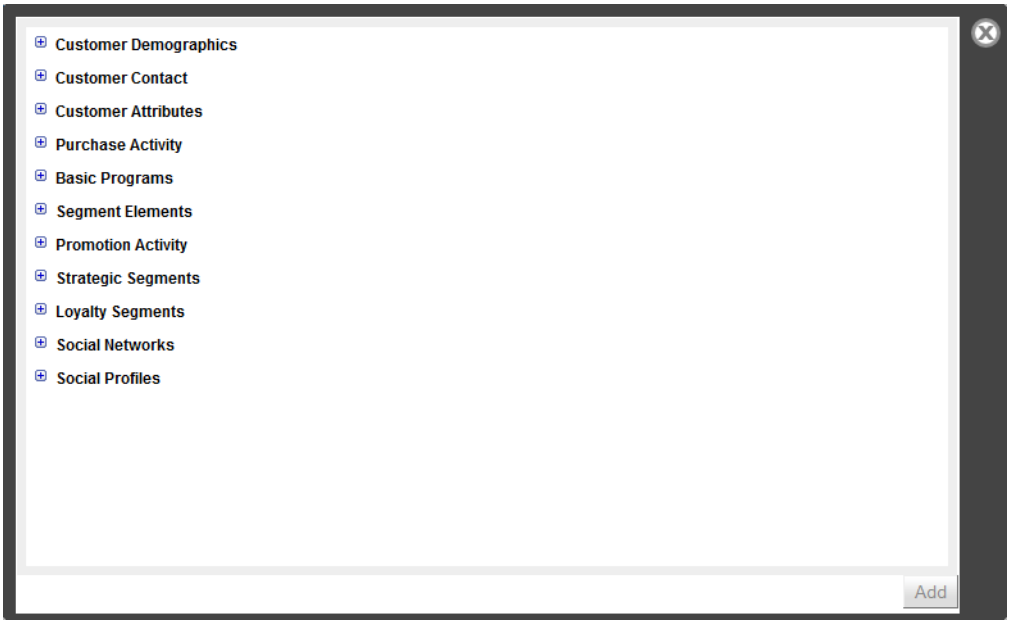


Figure 6-10: Criteria Selection Window

d. Click the Check Box for each search criteria you are entering into the query. You can select multiple criteria.

e. Click the **Add** button.

The Criteria Selection Window closes and the search criteria is entered into the query, along with the associated criteria entry or selection fields.

f. Enter the search criteria into the appropriate fields. See Appendix A: "Segment Queries" on page 687 for more information about criteria fields.

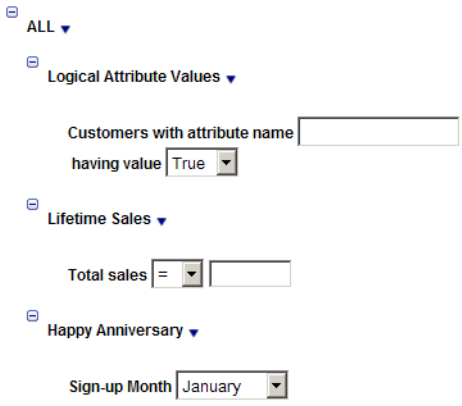


Figure 6-11: Search Criteria Fields

g. If necessary, return to step a and make further changes or additions to the search criteria.

7. When you have finished entering criteria information, click **next** to continue.

- If the **Open Access** Check Box was checked (☑) in the Segment Name step (see step 2 on page 195), the Text step opens. Continue with the next step.
- If the **Open Access** Check Box was unchecked (☐) in the Segment Name step, the Schedule Attribute step opens. Continue with step 10.

8. Define the Text that will be displayed for the Segment:

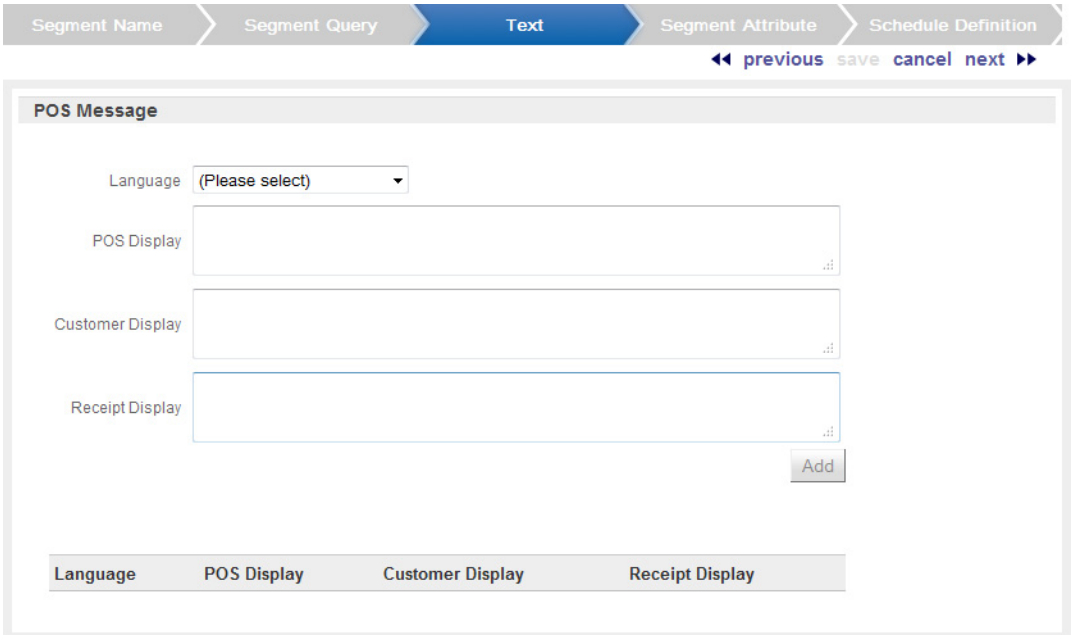


Figure 6-12: Text Step

a. Use the **Language** Selection Menu to select the language of the messages.

> *Only one set of texts can be configured for a language in one Segment. To replace a set of texts for a language, select the language in the Selection Menu and enter the new texts. The existing entry will be overwritten.*

b. In the **POS Display** Text Area Field, enter the text that will be displayed to the associate/employee using the POS system.

c. In the **Customer Display** Text Area Field, enter the text that will be shown on the customer-facing display and, depending upon the configuration of the POS system, the signature capture device while the transaction is being performed.

d. In the **Receipt Display** Text Area Field, enter the text that will be written on the customer receipt.

e. Click the **Add** button to add the texts to the Segment.

The text is displayed in the table at the bottom of the page.

Language	POS Display	Customer Display	Receipt Display
DE	Das ist gut, ja?	Ja, das ist gut.	Das war gut.

Figure 6-13: Table of Configured Texts

f. Repeat steps a-e to add text values for each required language.

g. To delete an existing text, click the text to open a menu, then click the **Delete** Link.

9. When you have completed configured text values, click **next** to continue.

10. Define the Attributes for the Segment:

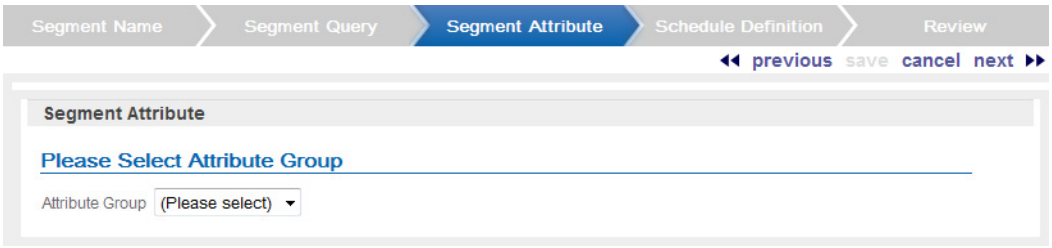


Figure 6-14: Segment Attribute

a. Select the **Attribute Group** in the Selection Menu. *The values in this Selection Menu are determined by configuration. See Chapter 20, "Attributes" on page 579 for more information about Attributes and Attribute Groups.*

The Attributes belonging to the selected Attribute Group are displayed.

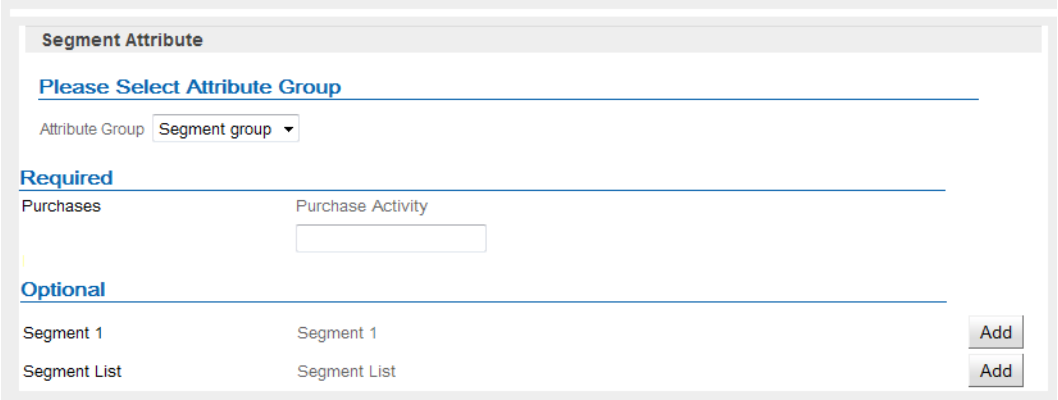


Figure 6-15: Segment Attributes - Attribute Group Selected

b. Select or enter the configuration values for each of the **Required** Attributes.

c. Add any necessary **Optional** Attribute(s):

1) Click the **Add** button for the Attribute to add.

A configuration field opens.

2) Select or enter the configuration value for the Attribute.

3) Repeat until all necessary Attribute(s) are configured.

d. Remove any unwanted Attributes by clicking the **Delete** button for each Attribute to remove.

The Attribute is deleted.

11. When you have completed configuring the Attributes, click **next** to continue.

12. Define the Schedule on which the Segment Query will run:

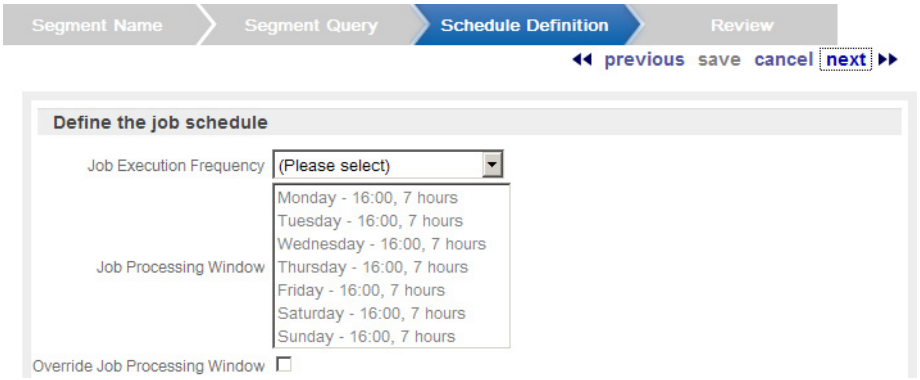


Figure 6-16: Schedule Definition Step

a. Select the Job Execution Frequency. This Selection Menu has the following options:

- **Once, Immediately** - Run the Segment Query as soon as the Segment has been completed. If you select this option, continue with step g. *This option is not available if* **Publish to Clienteling** *or* **Publish to Promote** *are selected in the Segment Name step (see step 2 on page 195).*
- **Once, Later** - Run the Segment Query at a later date or time. *This option is not available if* **Publish to Clienteling** *or* **Publish to Promote** *are selected in the Segment Name step (see step 2 on page 195).*
- **Daily** - Run the Segment Query every day.
- **Daily, Business Days Only** - Run the Segment Query only on business days (i.e. Monday through Friday).
- **Weekly** - Run the Segment Query once each week.
- **Monthly** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **Once, Later**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **Daily**, or **Daily, Business Days Only**, continue with step f.
- If you selected a Job Execution Frequency of **Weekly**, continue with step d.
- If you selected a Job Execution Frequency of **Monthly**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.

> *It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.*

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

13. When you have finished defining the schedule, click **next** to continue.

The Review step opens.

14. Review the entered information to ensure that it is correct.

- ❑ Click **save** to save the Segment with the current settings and return to the Unstratified Segment List.
- ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
- ❑ Click **cancel** to delete all information and return to the Unstratified Segment List.

Job Processing Window

The Job Processing Window displays the time(s) at which scheduled jobs should run. The Window is intended to indicate times when there will be little processing load on the system, so that Job processing will not interfere with transaction processing.



Figure 6-17: Job Processing Window

Each line in the Job Processing Window field defines a portion of the Job Processing Window. These lines have the following format:

```
[Day of Week] - [Start Time], [Duration]
```

Where:

- `[Day of Week]` is a day of the week (e.g. Sunday).
- `[Start Time]` is the time at which the Window begins, in 24-hour clock time.
- `[Duration]` is the length of time that the Window is open.

Stratified Segments

Stratified Segments define groups of Customers. The Customers within a Stratified Segment are divided into levels within the Segment.

Stratified Segment List

The Stratified Segment List page is opened using the **Segment->Stratified Segment** menu option, or by clicking the **Stratified Segment** Link on the Main Page.

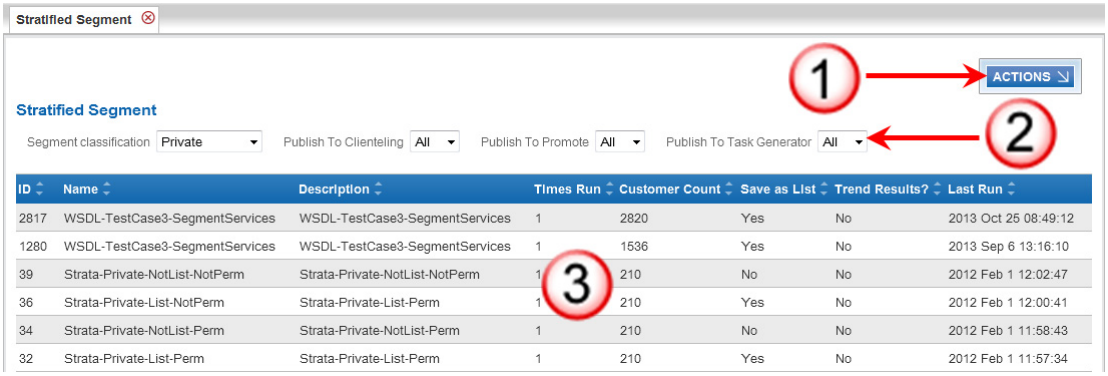


Figure 6-18: Stratified Segment List

Table 6-2: *Stratified Segment List Page Key*

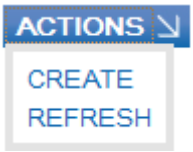
Item	Description
1	**Actions Menu** - Click to open a menu of actions that can be performed in the Stratified Segment List page. See "Actions Menu" on page 193 for more information.
2	**Filter Menus** - Select criteria in the Filter Menus to view a subset of the Segments in the Stratified Segment List. See "Filter Menus" on page 204 for more information.

Table 6-2: *Stratified Segment List Page Key (continued)*

Item	Description
3	**Stratified Segment List** - A List of Stratified Segments currently in the system. The List displays a limited number of Segments; use the Filter Menus to narrow down the List and locate a certain Segment. This List includes the following information for each Segment: ■ **ID** - Unique ID for the Segment. ■ **Name** - Name of the Segment. ■ **Description** - Description of the Segment. ■ **Times Run** - The number of times the Segment has been run. ■ **Customer Count** - Number of Customers in the Segment. ■ **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. If this option is set to **No**, the Segment only creates a count of the Customers that meet the criteria. ■ **Trend Results** - Indicates whether trend results are saved for the Segment. ■ **Last Run** - The most recent date and time on which the Segment was run.

Actions Menu

The Actions Menu in the Stratified Segment List contains the following option:



- **CREATE** - Create a Stratified Segment. See "Create Stratified Segment" on page 210.
- **REFRESH** - Refresh the List, displaying any updates to the Stratified Segments.

Filter Menus

The Stratified Segment List includes the following filter menus:



Figure 6-19: Stratified Segment List Filter Menus

- **Segment Classification** - Filters the List by Segment Classification.

  This filter has the following options:

  - **Private** - **[DEFAULT]** Display only private Segments.
  - **Public** - Display only public Segments.
  - **Open Access** - Display only open access Segments.

- **Publish to Clienteling** - Filters the List by whether the Segments have been published to Clienteling. *This Selection Menu is only displayed if the Show Clienteling Customer Search Menu configuration is enabled in Conflate*.

  > **See also:** The *Relate Configuration Guide* for more information about Conflate.

  This filter has the following options:

  - **All** - **[DEFAULT]** Do not filter the List by Clienteling status.
  - **Yes** - Display only those Segments that are published to Clienteling.
  - **No** - Display only those Segments that are not published to Clienteling.

- **Publish to Promote** - Filters the List by whether the Segments have been made available to Promote. *This Selection Menu is only displayed if the Enable Promote Integration configuration is enabled in Conflate*.

  > **See also:** The *Relate Configuration Guide* for more information about Conflate.

  This filter has the following options:

  - **All** - **[DEFAULT]** Do not filter the List by Clienteling status.
  - **Yes** - Display only those Segments that are published to Promote.
  - **No** - Display only those Segments that are not published to Promote.

- **Publish to Task Generator** - Filters the List by whether the Segments can be used to create Tasks. *This Selection Menu is only displayed if the Enable Task Generator configuration is enabled in Conflate*.

  > **See also:** The *Relate Configuration Guide* for more information about Conflate.

  This filter has the following options:

  - **All** - **[DEFAULT]** Do not filter the List by whether it generates Tasks.
  - **Yes** - Display only those Segments that generate Tasks.
  - **No** - Display only those Segments that do not generate Tasks.

Open a Stratified Segment

To open a Stratified Segment, click the Segment in the List. The Segment opens in a Stratified Segment Window.

Stratified Segment Window

A Stratified Segment Window displays information about the Stratified Segment opened in the Window, and provides the ability to perform actions on the Stratified Segment.

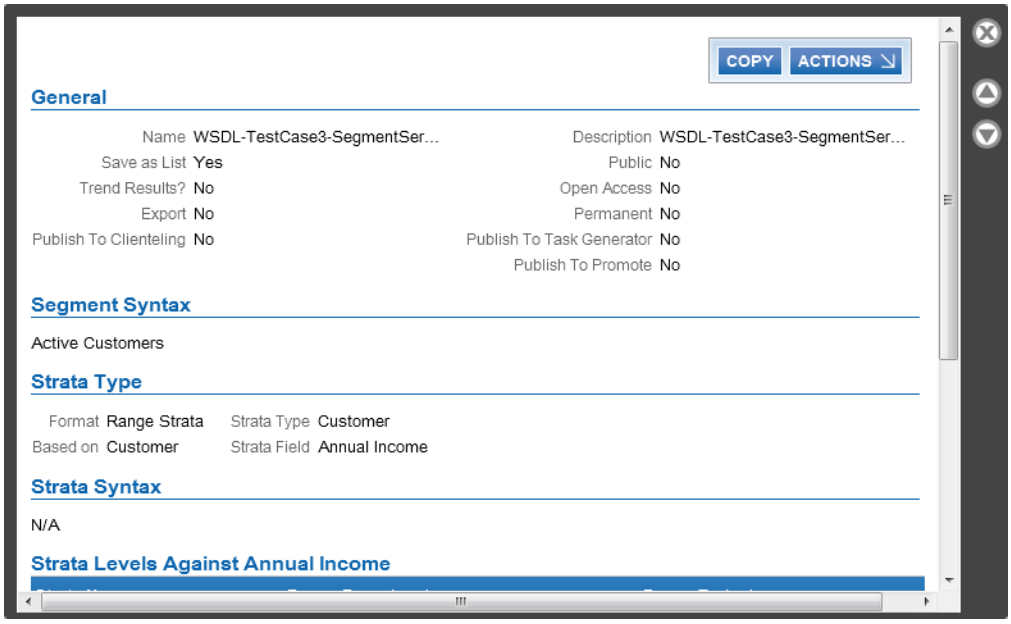


Figure 6-20: Stratified Segment Window

The following information is displayed in the Unstratified Segment Window:

- **General** - General information about the Segment. This area includes the following information:
  - **Name** - Name of the Segment.
  - **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. If this option is set to **No**, the Segment only creates a count of the Customers that meet the criteria.
  - **Trend Results?** - Indicates whether the results of the Segment run are kept to provide trend information about the Segment.
  - **Export** - Indicates whether the Segment results are automatically exported after the Segment Query is run.
  - **Publish to Clienteling** - Indicates whether the Segment has been made available to the Clienteling module.
  - **Description** - A description of the Segment.
  - **Public** - Indicates whether the Segment is Public.
  - **Open Access** - Indicates whether the Segment has Open Access.
  - **Permanent** - Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job.
  - **Publish to Task Generator** - Indicates whether the Segment has been made available to the Task Generator Job.

- **Publish to Promote** - Indicates whether the Segment has been made available to Promote.

- **Segment Syntax** - The criteria that a Customer must meet to be included in the Segment.
- **Strata Type** - Describes how Customers are divided into Strata. This area includes the following information:
  - **Format** - The format used to create the Strata. This field has the following possible values:
    - **Range Strata** - Strata are determined by configured ranges.
    - **Ntile Strata** - Strata are placed into equally-sized groups of Customers.
  - **Based on** - The basis used for determining the Strata Field. This field has the following possible values:
    - **Customer** - Customer fields.
    - **Loyalty Summary** - Summary information of Loyalty Accounts.
    - **Loyalty Detail** - Detailed information about Loyalty Accounts.
    - **Header** - Transaction headers.
    - **Detail** - Transaction details.
  - **Strata Type** - The type of data available in the Based On and Field to Stratify On fields. This field has the following possible values:
    - **Customer** - Customer data.
    - **Loyalty** - Loyalty Account information.
    - **Transaction** - Transaction information.
  - **Strata Field** - The field used to create the Strata.
  - **Sort Order** - The order in which the Customer values will be organized in the Strata. *This field is only visible if the Format is **Ntile Strata**.*
    - **Ascending** - The Strata having the lowest values will be displayed first.
    - **Descending** - The Strata having the greatest values will be displayed first.
- **Strata Syntax** - The criteria that a Customer must meet to be included in a Strata.
- **Strata Levels Against <Strata Field>** - This List displays the Strata within the Segment. This List displays the following information:
  - **Strata Name** - Name of the Strata.
  - **Range From (>=)** - Bottom limit of the range for the <Strata Field>. *This field is only displayed if the Format is Range Strata.*
  - **Range From (<)** - Top limit of the range for the <Strata Field>. *This field is only displayed if the Format is Range Strata.*
- **Segment Messages** - This List displays the messages configured for the Segment. *This List is only displayed for Public Segments with Open Access.* This List displays the following information:
  - **Language** - ID code for the language.

- **POS Display** - Text displayed to the cashier using the POS.
- **Customer Display** - Text shown to the customer on the customer-facing display.
- **Receipt Display** - Text printed on the receipt.

- **Franchisees** - IDs of the Franchisees, if any, included in the Segment. If Franchisees are assigned, only the Customers assigned to those Franchisees will be included in the Segment.
- **Attributes** - Attributes of the Segment. The following information is displayed for each attribute assigned to the Segment:
  - Name of the attribute.
  - Value(s) assigned to the attribute.
- **Trend Data** - If available, this List displays the Trend results for the Segment Strata. This List displays the following information:
  - **Run ID** - The ID for the Segment run.
  - **Run Date** - Date on which the Segment was most recently run.
  - **Strata Level** - Number of the Strata Level.



Strata Level 0 is used to indicate how many Customers were not included in a Strata. For example, Customers with a <Strata Field> value less than the bottom limit of the first Strata level.

  - **Min Value** - The smallest value for the field by a Customer in the Strata.
  - **Max Value** - The largest value for the field by a Customer in the Strata.
  - **Avg Value** - The average value for the field among the Customers in the Strata.
  - **Customer Count** - The number of Customers in the Strata.

Copy Stratified Segment

To create a copy of the Stratified Segment in the Create Stratified Segment Wizard, click Copy.

A copy of the Stratified Segment is opened in the Create Stratified Segment Wizard, with all the same settings and information as the copied Segment. For more information about the fields and information to be entered, see "Create Stratified Segment" on page 210.

- Use Wizard Navigation to move through the Segment.
- Make any necessary changes.
- Configure the Schedule Definition (the run schedule is not copied).
- Click **save** when you are finished making changes. The Segment will be saved and Relate will return to the Stratified Segment List.
- Click **cancel** to discard the changes, cancel the copy operation, and return to the Stratified Segment List.

For more information about the fields and information to be entered, see "Create Stratified Segment" on page 210.

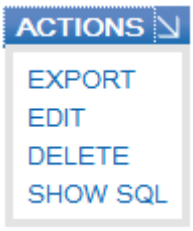
Actions Menu

The Actions Menu in the Stratified Segment Window has the following options:

> *Depending upon the current status of the Segment, all of the options below may not be available.*

- **EXPORT** - Exports the results after a Segment is run.

  A confirmation prompt opens, asking whether to export the Segment.



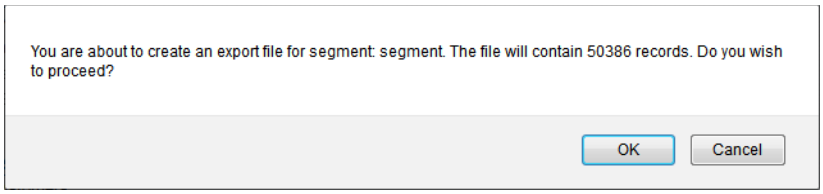


Figure 6-21: Export Confirmation Prompt

  - ❑ Click **OK** to export the Segment and close the prompt.
  - ❑ Click **Cancel** to close the prompt and not export the Segment.
- **EDIT** - Edit the Segment.

  The Segment opens in the Stratified Segment Wizard. See "Create Stratified Segment" on page 210 for further information about editing the Segment.
- **DELETE** - Deletes the Segment.

  A confirmation prompt opens, asking whether to delete the segment.

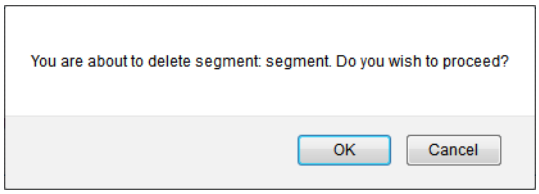


Figure 6-22: Delete Confirmation Prompt

  - ❑ Click **OK** to delete the Segment, and close the prompt and the Stratified Segment Window.
  - ❑ Click **Cancel** to close the prompt and keep the Segment in place.
- **SHOW SQL** - Opens a Query Window showing the SQL used by the Segment Query.

The Stratified Segment Window displays the SQL used to construct the Segment.

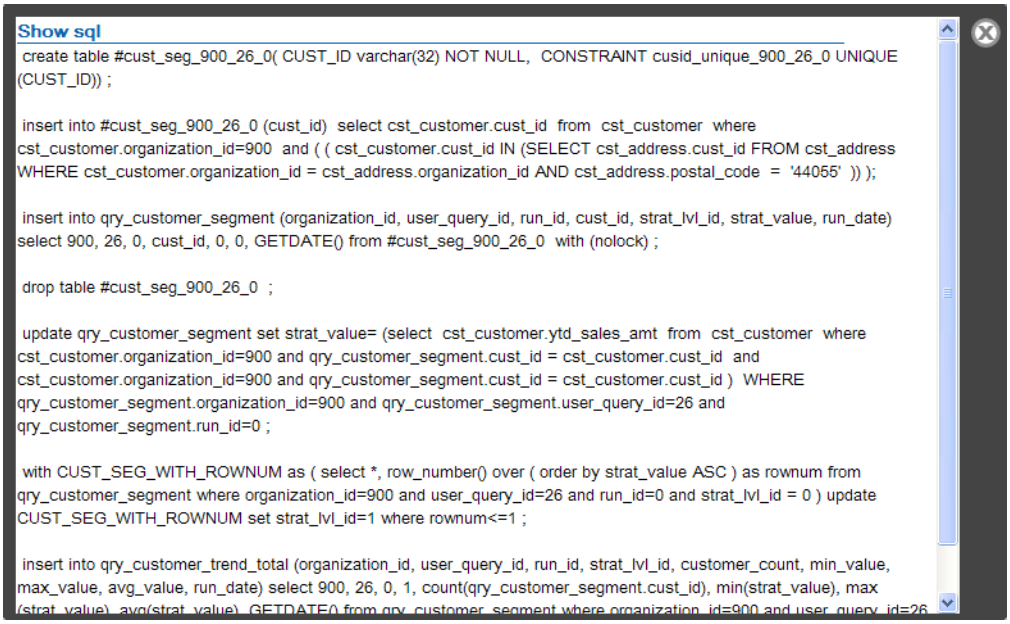


Figure 6-23: Show SQL

Create Stratified Segment

To create a new Stratified Segment:

1. In the Stratified Segment List page, click **Create** in the Actions Menu.

   The Stratified Segment creation Wizard opens.

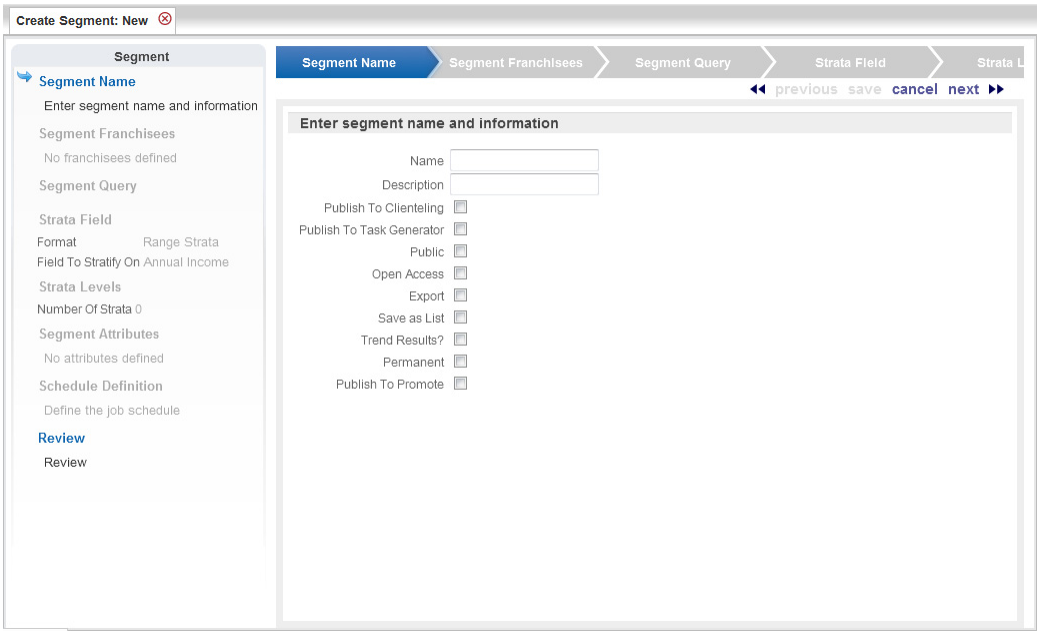


Figure 6-24: Create Stratified Segment Wizard

2. In the Segment Name step, enter information into the fields:

- **Name** - The name of the Segment.
- **Description** - A description of the Segment.
- **Segment Options** - Use each Check Box to select whether the Segment will have the associated property:
  - **Publish To Clienteling** - Determines whether the Segment will made available to the Clienteling module. See Chapter 3, "Clienteling" on page 161 for more information.



If the **Publish to Clienteling** *option is selected,* **Public**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Open Access**, **Export**, *and* **Publish to Promote** *are automatically unchecked and the Check Boxes are disabled.*

A User must be assigned the Relate_PublishClientelingSegment Role to see this option.

See also: The *Relate Configuration Guide* for more information about Roles.

  - **Publish to Task Generator** - Determines whether tasks will be created for this Segment.



If the **Publish to Task Generator** *option is selected,* **Export**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Public**, **Open Access**, *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

  - **Public** - Determines whether the Segment will be Public.
  - **Open Access** - Determines whether the Segment will have Open Access.



If the **Open Access** *option is selected,* **Public**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Export** *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

  - **Export** - Determines whether the Segment results will be automatically exported after the Segment Query is run.



If the **Export** *option is selected,* **Save as List** *is automatically checked and the Check Box is disabled;* **Open Access** *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

  - **Save as List** - Determines whether a List of matching Customer IDs will be created when the segment is created. If this option is not checked, the Segment will only create a count of the Customers that meet the criteria.

- **Trend Results?** - Determines whether the results of the Segment run will be kept to provide trend information about the Segment.
- **Permanent** - Determines whether the Segment will be kept, even if it meets the criteria for deletion by the housekeeping job.
- **Publish To Promote** - Determines whether the Segment will be made available to Promote.

> *If the* **Publish to Promote** *option is selected,* **Public**, **Export**, **Save as List**, *and* **Permanent** *are automatically checked and the Check Boxes are disabled;* **Publish to Clienteling** *and* **Trend Results** *are automatically unchecked and the Check Boxes are disabled.*

3. When you have finished entering information, click **Next**.

- If Franchisees are enabled in Relate, the Franchisees step opens. Continue with step 4.
- If Franchisees are not enabled in Relate, the Segment Query step opens. Continue with step 6.

4. Configure the Franchisees to be included in the Segment:

- If all Franchisees will be included in the Segment, do not select any Franchisees.
- If only a subset of Franchisees will be included in the Segment, select the Check Box for each Franchisee to be included.
- To select all the current Franchisees (so that any new Franchisees will be excluded from the Segment), click **Select All**.

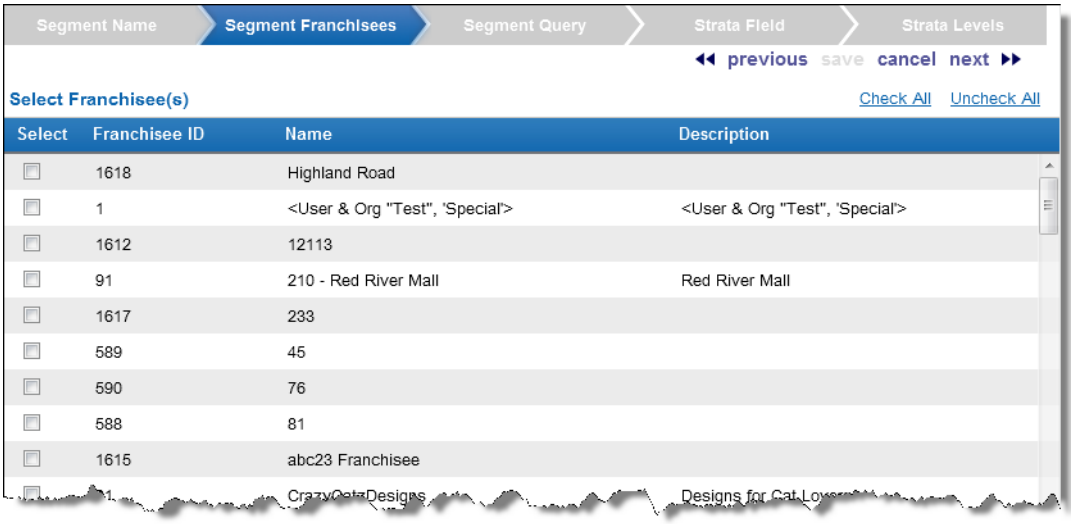


Figure 6-25: Segment Franchisees

5. Click **next** when you are finished.

Continue with the next step.

6. Build the Segment Query:

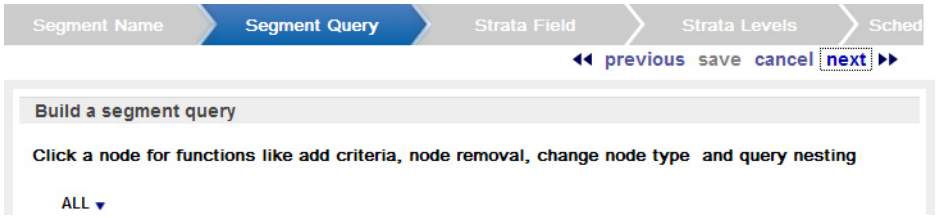


Figure 6-26: Segment Query

a. Click the **ALL** or **ANY** node to open the query menu.

- In an ALL node, a record will only be included in the node if it matches all of the criteria in the subnodes of the current node. Equivalent to a logical AND.
- In an ANY node, a record will be included in the node if it matches any of the criteria in the subnodes of the current node. Equivalent to a logical OR.

b. Select the option to perform:

- **Delete** - Deletes the node (the root node cannot be deleted).

  If the node is not the root node, a confirmation prompt opens.

  Click **OK** to delete the node, or click **Cancel** to close the confirmation prompt and keep the node in place. Return to step a for the remaining nodes.
- **Add Criteria** - Add a new criteria to the ANY or ALL node.

  A Criteria Selection Window opens. Continue with step c.
- **Change to 'ANY'** - Changes an ALL node to an ANY node; return to step a using the changed node.
- **Change to 'ALL'** - Changes an ANY node to an ALL node; return to step a using the changed node.
- **Add 'ALL' branch** - Adds an 'ALL' subnode to the current node.

  To create the rules for this subnode, return to step a using this new node.
- **Add 'ANY' branch** - Adds an 'ANY' subnode to the current node.

  To create the rules for this subnode, return to step a using this new node.

c. In the Criteria Selection Window, click a criteria group to expand its List of criteria, or click **Expand** to open all the criteria groups. See Appendix A: "Segment Queries"

on page 687 for more information about criteria group organization.

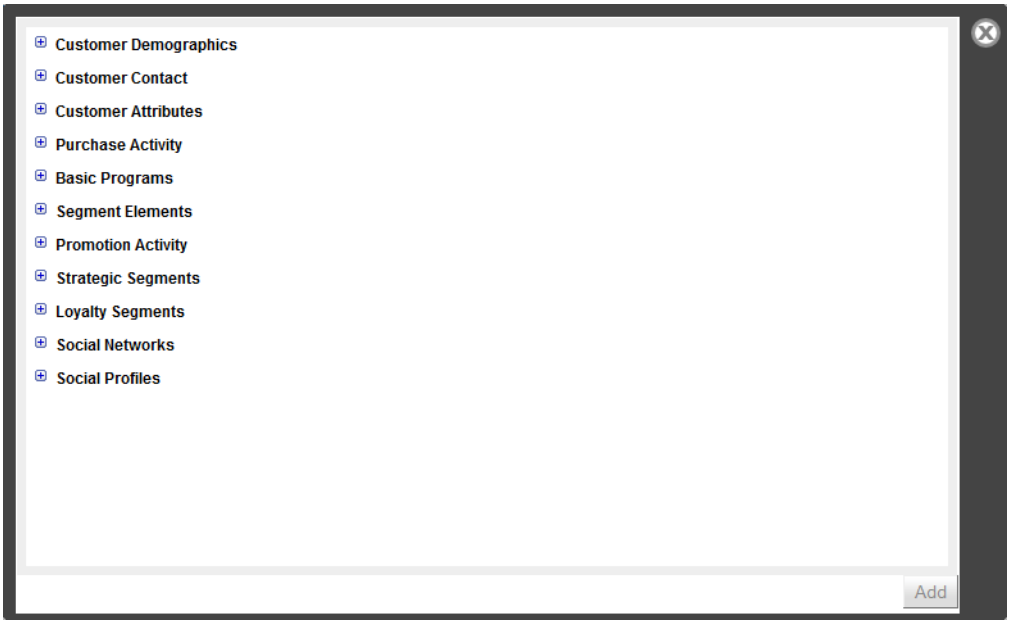


Figure 6-27: Criteria Selection Window

d. Click the Check Box for the search criteria you are entering into the query. You can select multiple criteria.

e. Click the **Add** button.

The Criteria Selection Window closes and the search criteria is entered into the query, along with the associated criteria entry or selection fields.

f. Enter the search criteria into the appropriate fields. See Appendix A: "Segment Queries" on page 687 for more information about criteria fields.

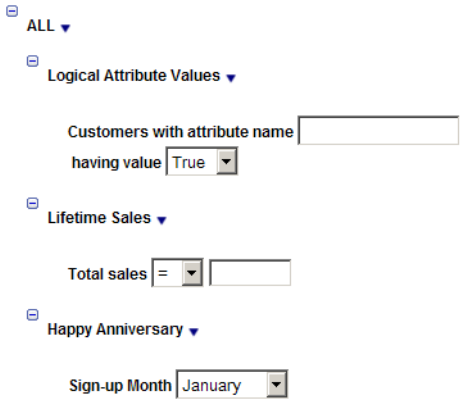


Figure 6-28: Search Criteria Fields

g. If necessary, return to step a and make further changes or additions to the search criteria.

7. When you have finished entering criteria information, click **next** to continue.

The Strata Field step opens.

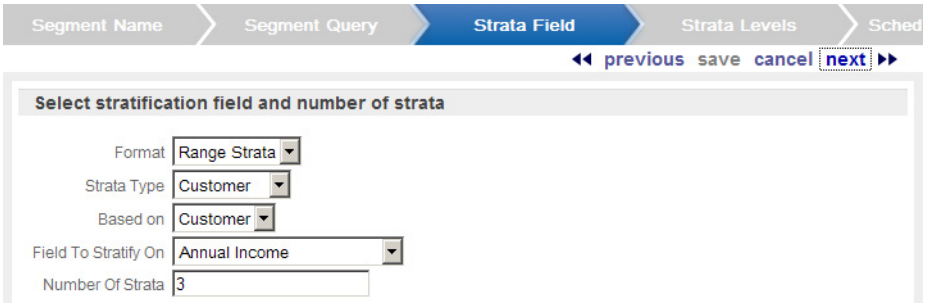


Figure 6-29: Strata Field Step

8. Select the criteria on which the Strata are determined:

- **Format** - The Format of the Strata. This Selection Menu has the following options:
  - **Range Strata** - Strata are determined by configured ranges.
  - **Ntile Strata** - Strata are placed into equally-sized groups of Customers.
- **Strata Type** - The type of data available in the Based On and Field to Stratify On fields. This Selection Menu has the following options:
  - **Customer** - Customer data.
  - **Loyalty** - Loyalty Account information.
  - **Transaction** - Transaction information.
- **Based on** - Determines the basis used for determining the Field to Stratify On. This Selection Menu has the following options, depending upon the selection in the Strata Type field:

  If Strata Type = **Customer**, the following options are available:
  - **Customer** - Customer fields.

  If Strata Type = **Loyalty**, the following options are available:
  - **Loyalty Summary** - Summary information of Loyalty Accounts.
  - **Loyalty Detail** - Detailed information about Loyalty Accounts.

  If Strata Type = **Transaction**, the following options are available:
  - **Header** - Transaction headers.
  - **Detail** - Transaction details.
- **Field to Stratify On** - Determines the field used to create the Strata. This Selection Menu has the following options, depending upon the selection in the Based On field:

  If Based On = **Customer**, the following options are available:
  - **Annual Income** - Customer's annual income.
  - **Customer Net Worth** - Customer's net worth.
  - **Lifetime Sales** - Lifetime total amount of all sales made to the Customer.
  - **Lifetime Returns** - Lifetime total amount of all returns made by the Customer.

- **Lifetime Transaction Count** - Lifetime total number of transactions.
- **Lifetime Sold Item Count** - Lifetime total number of items sold.
- **Lifetime Return Item Count** - Lifetime total number of items returned.
- **Lifetime Profit Percent** - Lifetime percentage of profit on all Customer transactions.
- **YTD Sales** - Total amount of all sales during the year to date.
- **YTD Returns** - Total amount of all returns during the year to date.
- **YTD Trans Count** - Total number of transactions during the year to date.
- **YTD Sold Item Count** - Total number of items sold during the year to date.
- **YTD Return Item Count** - Total number of items returned during the year to date.
- **YTD Profit Percent** - Percentage of profit on all Customer transactions during the year to date.
- **Customer Age** - Age of the Customer.
- **Days Since Purchase** - Number of days since the Customer's last purchase.
- **Attributes** - Attribute values.

If Based On = **Loyalty Summary**, the following options are available:

- **Earned Points Balance** - Current balance of earned points.
- **YTD Points** - Total number of points earned during the year to date.
- **LTD Points** - Total number of points earned over the lifetime of the Loyalty Account.

If Based On = **Loyalty Detail**, the following options are available:

- **Sum Number of Points** - Total number of points in the Loyalty Account.
- **Count Number of Transactions** - Total number of Loyalty transactions.
- **Days Since Last Activity** - Days since the last Loyalty transaction.

If Based On = **Transaction Header**, the following options are available:

- **Sum of Transaction Amount** - Total amount of all transactions.
- **Number of Transactions** - Total number of transactions.
- **Days Since Purchase** - Number of days since the last purchase transaction.

If Based On = **Transaction Detail**, the following options are available:

- **Sum of Line Item** - Sum of all line items in all transactions.
- **Days Since Purchase** - Number of days since the last purchase transaction.
- **Sold Item Count** - Total number of items sold.
- **Transaction Count** - Total number of transactions.

- **Number of Strata** - Determines the number of Strata Levels.
- **Sort Order** - Determines the order in which the Customer values will be organized in the Strata (this field is only visible if the Format is set to **Ntile Strata**). This

Selection Menu has the following values:

- **Ascending** - The Strata having the lowest values will be displayed first.
- **Descending** - The Strata having the greatest values will be displayed first.

9. When you have finished defining the Strata Field, click **next** to continue.

The Strata Levels step opens.

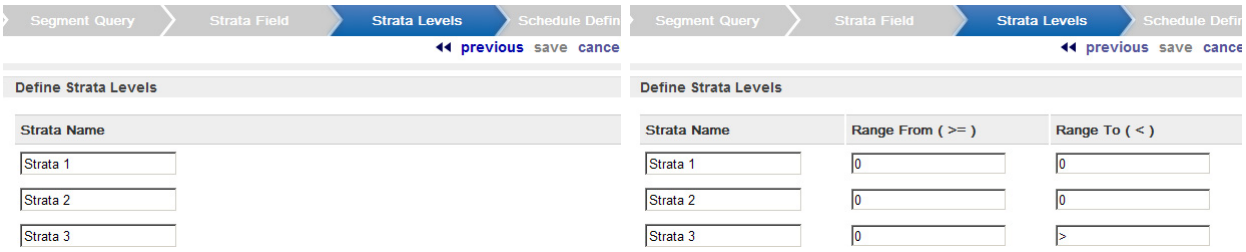


Figure 6-30: Strata Levels Step

10. Define the Strata Levels:

a. Enter a **Strata Name** for each Strata in the Segment.

b. If the Format was set to **Range Strata** in the Strata Field step, define the ranges for the Strata:

1) In the **Range From (>=)** fields, enter the minimum value of each Strata.

If the Strata Field value for the Customer equals this value, it will be included in this Strata.

2) In the **Range To** fields, enter the maximum value of each Strata.

If the Strata Field value for the Customer equals this value, it will not be included in this Strata.

11. When you have finished defining the Strata Levels, click **next** to continue.

- If the Strata Type = **Customer**, continue with the proper step:
  - If the **Open Access** Check Box was checked (☑) in the Segment Name step (see step 2 on page 211), the Text step opens. Continue with step 14.
  - If the **Open Access** Check Box was unchecked (☐) in the Segment Name step, the Segment Attribute Step opens. Continue with step 16.
- If the Strata Type = **Loyalty** or **Transaction**, the Strata Query Step opens. Continue with the next step.

12. Define the Stratification Query:

a. Click the **ALL** or **ANY** node to open the query menu.

- In an ALL node, a record will only be included in the node if it matches all of the criteria in the subnodes of the current node. Equivalent to a logical AND.
- In an ANY node, a record will be included in the node if it matches any of the criteria in the subnodes of the current node. Equivalent to a logical OR.

b. Select the option to perform:

- **Delete** - Deletes the node (the root node cannot be deleted).

  If the node is not the root node, a confirmation prompt opens.

  Click **OK** to delete the node, or click **Cancel** to close the confirmation prompt and keep the node in place. Return to step a for the remaining nodes.

- **Add Criteria** - Add a new criteria to the ANY or ALL node.

  A Criteria Selection Window opens. Continue with step c.

- **Change to 'ANY'** - Changes an ALL node to an ANY node; return to step a using the changed node.

- **Change to 'ALL'** - Changes an ANY node to an ALL node; return to step a using the changed node.

- **Add 'ALL' branch** - Adds an 'ALL' subnode to the current node.

  To create the rules for this subnode, return to step a using this new node.

- **Add 'ANY' branch** - Adds an 'ANY' subnode to the current node.

  To create the rules for this subnode, return to step a using this new node.

c. In the Criteria Selection Window, click a criteria group to expand its List of criteria, or click **Expand** to open all the criteria groups. See Appendix A: "Segment Queries" on page 687 for more information about criteria group organization.

d. Click the Check Box for the search criteria you are entering into the query. You can select multiple criteria.

e. Click the **Add** button.

The Criteria Selection Window closes and the search criteria is entered into the query, along with the associated criteria entry or selection fields.

f. Enter the stratification criteria into the appropriate fields. See Appendix A: "Segment Queries" on page 687 for more information about criteria fields.

g. If necessary, return to step a and make further changes or additions to the search criteria.

13. When you are finished configuring the Stratification Query, continue with the proper step:

- If the **Open Access** Check Box was checked (☑) in the Segment Name step (see step 2 on page 211), the Text step opens. Continue with step 14.
- If the **Open Access** Check Box was unchecked (☐) in the Segment Name step, the Segment Attribute Step opens. Continue with step 16.

14. Define the Text that will be displayed for the Segment:

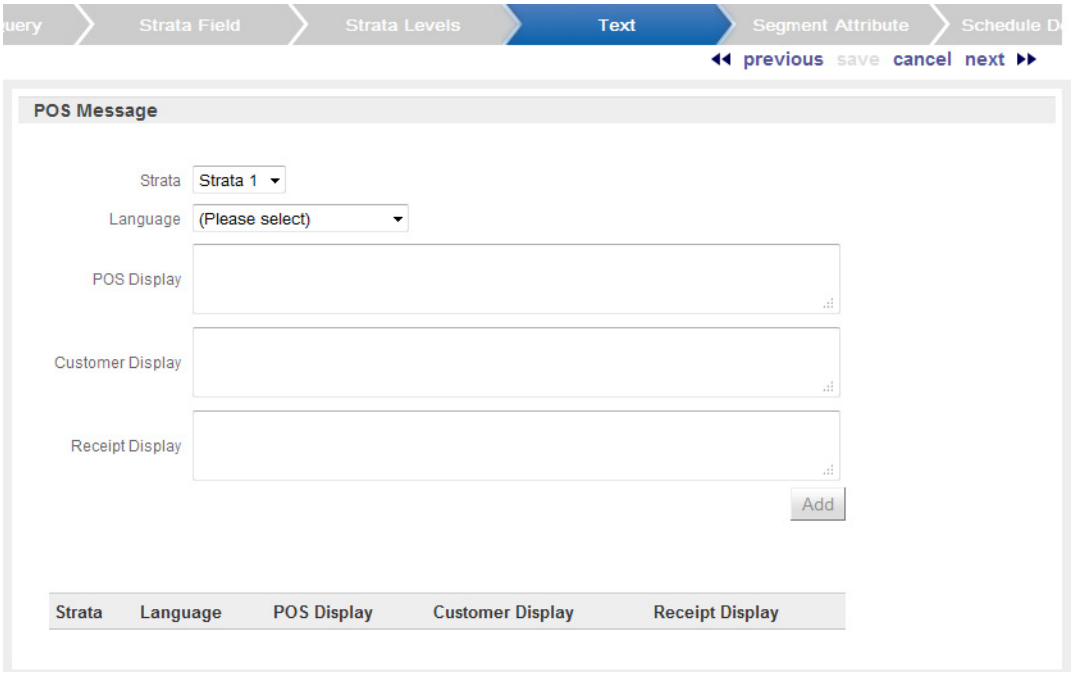


Figure 6-31: Text Step

a. Use the **Language** Selection Menu to select the language of the messages.

> *Only one set of texts can be configured for a language in one Segment. To replace a set of texts for a language, select the language in the Selection Menu and enter the new texts. The existing entry will be overwritten.*

b. In the **POS Display** Text Area Field, enter the text that will be displayed to the associate/employee using the POS system.

c. In the **Customer Display** Text Area Field, enter the text that will be displayed to the customer while the transaction is being performed.

d. In the **Receipt Display** Text Area Field, enter the text that will be written on the customer receipt.

e. Click the **Add** button to add the texts to the Segment.

The text is displayed in the table at the bottom of the page.

Language	POS Display	Customer Display	Receipt Display
DE	Das ist gut, ja?	Ja, das ist gut.	Das war gut.

Figure 6-32: Table of Configured Texts

f. Repeat steps a-e to add text values for each required language.

g. To delete an existing text, click the text to open a menu, then click the **Delete** Link.

15. When you have completed configured text values, click **next** to continue.

16. Define the Attributes for the Segment:



Figure 6-33: Segment Attribute

a. Select the **Attribute Group** in the Selection Menu. *The values in this Selection Menu are determined by configuration. See Chapter 20, "Attributes" on page 579 for more information about Attributes and Attribute Groups.*

The Attributes belonging to the selected Attribute Group are displayed.

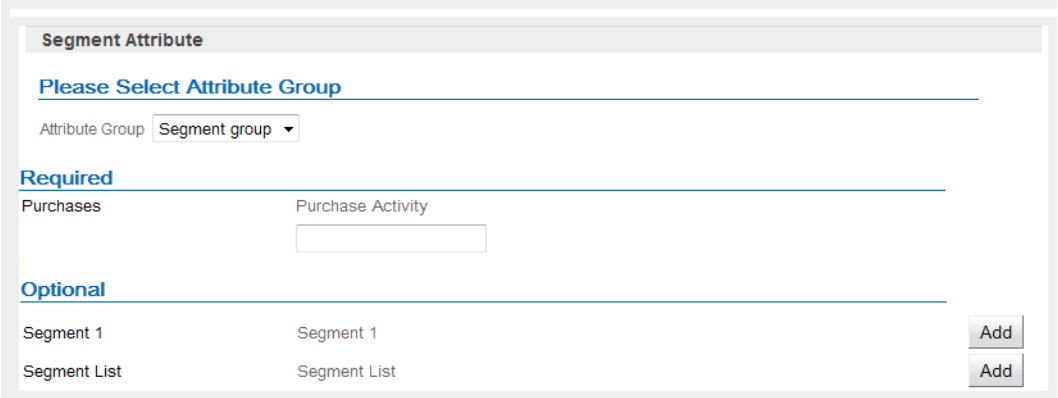


Figure 6-34: Segment Attributes - Attribute Group Selected

b. Select or enter the configuration values for each of the **Required** Attributes.

c. Add any necessary **Optional** Attribute(s):

1) Click the **Add** button for the Attribute to add.

A configuration field opens.

2) Select or enter the configuration value for the Attribute.

3) Repeat until all necessary Attribute(s) are configured.

d. Remove any unwanted Attributes by clicking the **Delete** button for each Attribute to remove.

The Attribute is deleted.

17. When you have completed configuring the Attributes, click **next** to continue.

18. Define the Schedule on which the Segment Query will run:

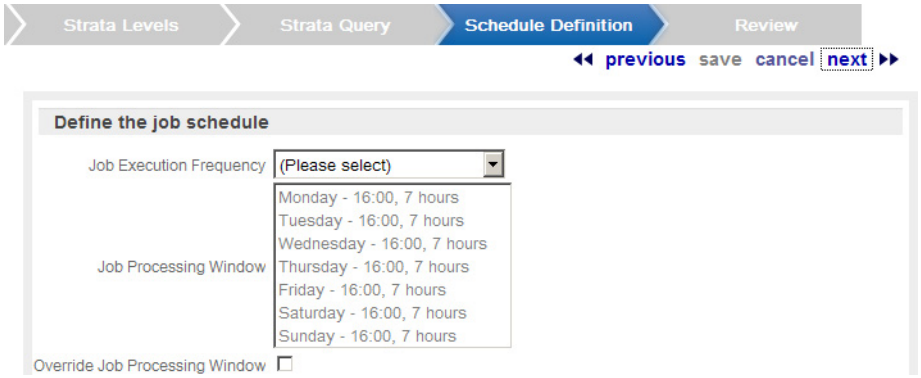


Figure 6-35: Schedule Definition

a. Select the Job Execution Frequency. This Selection Menu has the following options:

- **Once, Immediately** - Run the Segment Query as soon as the Segment has been completed. If you select this option, continue with step g. *This option is not available if* **Publish to Clienteling** *or* **Publish to Promote** *are selected in the Segment Name step (see step 2 on page 211).*
- **Once, Later** - Run the Segment Query at a later date. *This option is not available if* **Publish to Clienteling** *or* **Publish to Promote** *are selected in the Segment Name step (see step 2 on page 211).*
- **Daily** - Run the Segment Query every day.
- **Daily, Business Days Only** - Run the Segment Query only on business days (i.e. Monday through Friday).
- **Weekly** - Run the Segment Query once each week.
- **Monthly** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **Once, Later**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **Daily**, or **Daily, Business Days Only**, continue with step f.
- If you selected a Job Execution Frequency of **Weekly**, continue with step d.
- If you selected a Job Execution Frequency of **Monthly**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.

> *It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.*

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

19. When you have finished defining the Schedule, click **next** to continue.

The Review step opens.

20. Review the entered information to ensure that it is correct.

- ❑ Click **save** to save the Segment with the current settings and return to the Stratified Segment List.
- ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
- ❑ Click **cancel** to delete all information and return to the Stratified Segment List.

Job Processing Window

The Job Processing Window displays the time(s) at which scheduled jobs should run. The Window is intended to indicate times when there will be little processing load on the system, so that Job processing will not interfere with transaction processing.



Figure 6-36: Job Processing Window

Each line in the Job Processing Window defines a portion of the Job Processing Window. These lines have the following format:

```
[Day of Week] - [Start Time], [Duration]
```

Where:

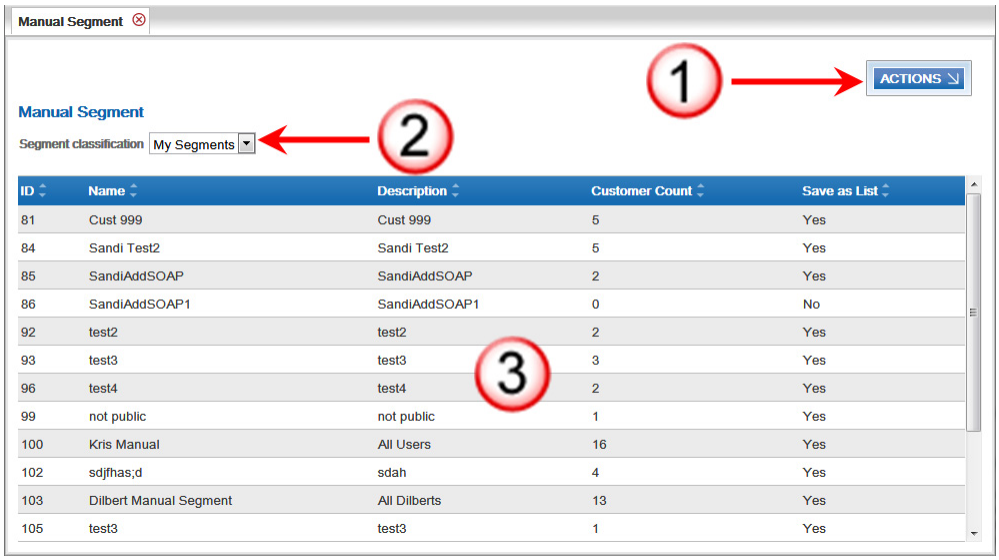
- `[Day of Week]` is a day of the week (e.g. Sunday).
- `[Start Time]` is the time at which the Window begins, in 24-hour clock time.
- `[Duration]` is the length of time that the Window is open.

Manual Segments

In Manual Segments Customers are selected individually for inclusion in the Segment. This allows Users to organize Customers into customized collections. For example, a User can create a list of their favorite customers.

Manual Segment List

The Manual Segment List page is opened using the **Segment->Manual Segment** menu option, or by clicking the **Manual Segment** Link on the Main Page.



ID	Name	Description	Customer Count	Save as List
81	Cust 999	Cust 999	5	Yes
84	Sandi Test2	Sandi Test2	5	Yes
85	SandiAddSOAP	SandiAddSOAP	2	Yes
86	SandiAddSOAP1	SandiAddSOAP1	0	No
92	test2	test2	2	Yes
93	test3	test3	3	Yes
96	test4	test4	2	Yes
99	not public	not public	1	Yes
100	Kris Manual	All Users	16	Yes
102	sdjfhas;d	sdah	4	Yes
103	Dilbert Manual Segment	All Dilberts	13	Yes
105	test3	test3	1	Yes

Figure 6-37: Manual Segment List

Table 6-3: *Manual Segment List Page Key*

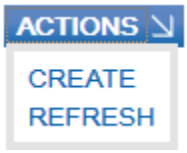
Item	Description
1	**Actions Menu** - Click to open a menu of actions that can be performed in the Manual Segment List page. See "Actions Menu" on page 224 for more information.
2	**Filter Menus** - Select criteria in the Filter Menus to view a subset of the Segments in the Manual Segment List. See "Filter Menu" on page 224 for more information.

Table 6-3: *Manual Segment List Page Key (continued)*

Item	Description
3	**Manual Segment List** - A List of Manual Segments currently in the system. The List displays a limited number of Segments; use the Filter Menu to narrow down the List and locate a certain Segment. This List includes the following information for each Segment: ■ **ID** - Unique ID for the Segment. ■ **Name** - Name of the Segment. ■ **Description** - Description of the Segment. ■ **Customer Count** - Number of Customers in the Segment. ■ **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. For Manual Segments, this configuration can only be set to **Yes**.

Actions Menu

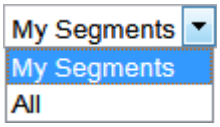
The Actions Menu in the Manual Segment List contains the following option:



- **CREATE** - Create a Manual Segment (see "Create Manual Segment" on page 226).
- **REFRESH** - Refresh the List, displaying any updates to the Manual Segments.

Filter Menu

The Manual Segment List includes the following filter menu:



- **Segment Classification** - Filters the List by Segment Classification.

  This filter has the following options:

  - **My Segments** - Only displays the Segments you created.
  - **All** - Display all Segments created by all Users.

Open a Manual Segment

To open a Manual Segment, click the Segment in the List. The Segment opens in an Manual Segment Window.

Manual Segment Window

The Manual Segment Window displays information about the Manual Segment opened in the Window, and provides the ability to perform actions on the Manual Segment.

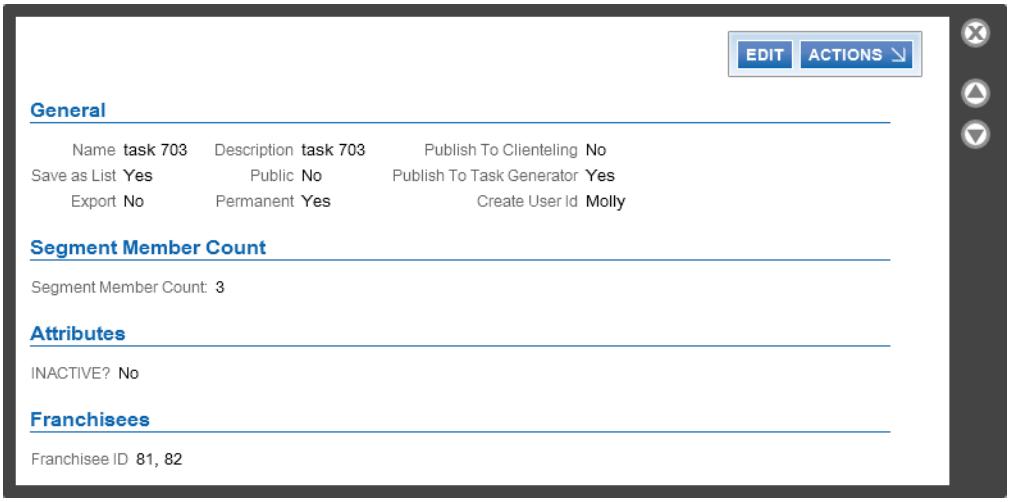


Figure 6-38: Manual Segment Window

The following information is displayed in the Manual Segment Window:

- **General** - General information about the Segment. This area includes the following information:
  - **Name** - Name of the Segment.
  - **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. For Manual Segments, this value is always set to **Yes**.
  - **Export** - Indicates whether the Segment list is automatically exported after the Segment is created or updated. For Manual Segments, this value is always set to **No**.
  - **Description** - A description of the Segment.
  - **Public** - Indicates whether the Segment is Public.
  - **Permanent** - Indicates whether the Segment is kept in the system, even if it meets the criteria for deletion by the housekeeping job. For Manual Segments, this value is always set to **Yes**.
  - **Publish to Clienteling** - Indicates whether the Segment has been made available to the Clienteling module.
  - **Publish to Task Generator** - Indicates whether the Segment has been made available to the Task Generator Job.
  - **Create User Id** - ID of the User who created the Segment.
- **Segment Member Count** - Information about the number of Customers in the Segment.
  - **Segment Member Count** - The number of Customers in the Segment.

- **Attributes** - Attributes of the Segment. The following information is displayed for each attribute assigned to the Segment:
  - Name of the attribute.
  - Value(s) assigned to the attribute.
- **Franchisees** - IDs of the Franchisees, if any, included in the Segment. If Franchisees are assigned, the Customers assigned to those Franchisees will be included in the Segment.

Actions Menu

The Actions Menu in the Manual Segment Window has the following option:



- **VIEW CUSTOMER LIST** - Open a List of Customers in the Segment. See "View Customer List" on page 231.
- **DELETE** - Delete the Manual Segment from the system. See "Delete Manual Segment" on page 232.

Create Manual Segment

To create a new Manual Segment:

1. In the Manual Segment List page, click **Create** in the Actions Menu.

   The Manual Segment creation Wizard opens.

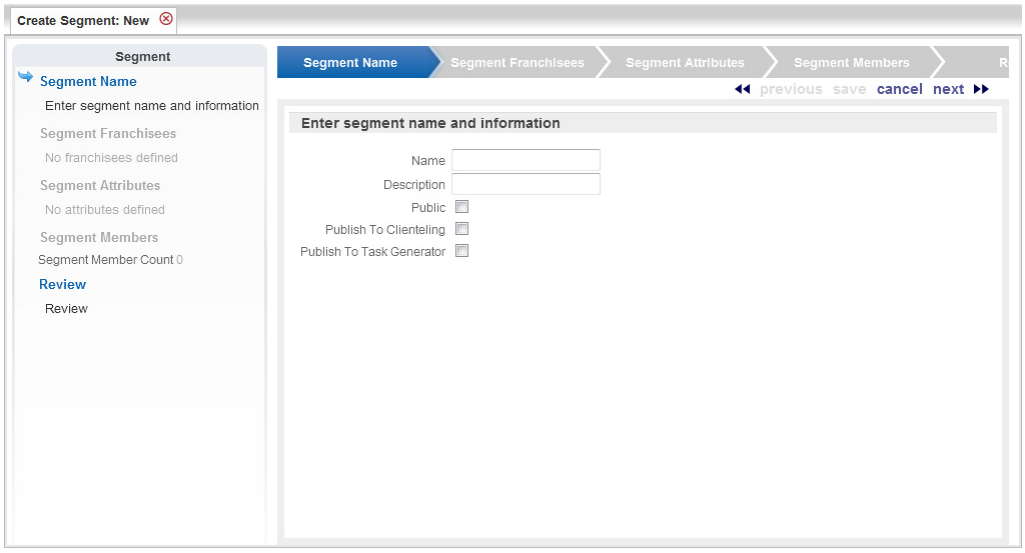


Figure 6-39: Create Manual Segment Wizard

2. Enter the required information in the Segment Name step.

   The Segment Name step has the following fields:
   - **Name** - Name of the Segment.
   - **Description** - Description of the Segment.

- **Public** - This Check Box determines whether the Segment is public.
- **Publish to Clienteling** - This Check Box determines whether the Segment will be available in the Clienteling module. See Chapter 3, "Clienteling" on page 161 for more information.



If the **Publish to Clienteling** *option is selected,* **Public** *is automatically checked,* **Generate Tasks** *is unchecked and the Check Boxes are disabled.*

A User must be assigned the `Relate_PublishClientelingSegment` *Role to see this option.*

See also: The *Relate Configuration Guide* for more information about Roles.

  - **Publish to Task Generator** - Determines whether tasks will be created for this Segment.



If the **Publish to Task Generator** *option is selected,* **Public** *is automatically unchecked and the Check Box is disabled.*

3. When you have finished entering information, click **Next**.
   - If Franchisees are enabled in Relate, the Segment Franchisees step opens. Continue with step 4.
   - If Franchisees are not enabled in Relate, the Segment Query step opens. Continue with step 6.
4. Configure the Franchisees to be included in the Segment:
   - If all Franchisees will be included in the Segment, do not select any Franchisees.
   - If only a subset of Franchisees will be included in the Segment, select the Check Box for each Franchisee to be included.

- ❑ To select all the current Franchisees (so that any new Franchisees will be excluded from the Segment), click **Select All**.

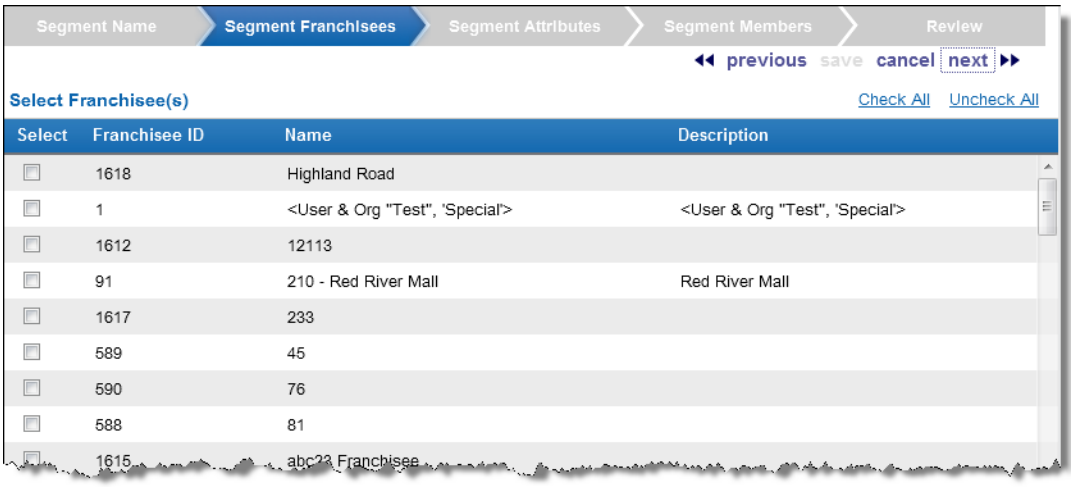


Figure 6-40: Segment Franchisees

5. Click **next** when you are finished.

The Segment Attributes step opens.

6. Configure the Segment Attributes:

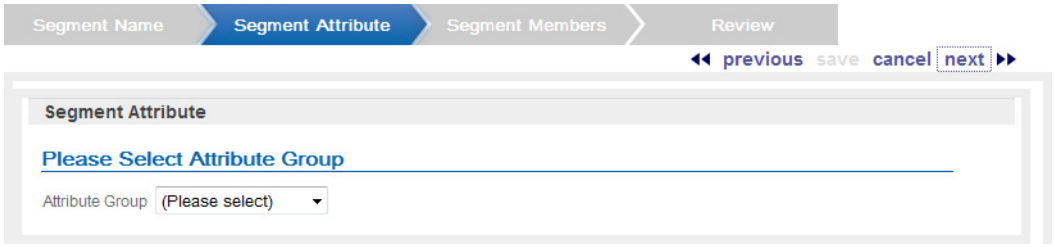


Figure 6-41: Segment Attribute Step

a. Select the **Attribute Group** in the Selection Menu. *The values in this Selection Menu are determined by configuration. See Chapter 20, "Attributes" on page 579 for more information about Attributes and Attribute Groups.*

The Attributes belonging to the selected Attribute Group are displayed.

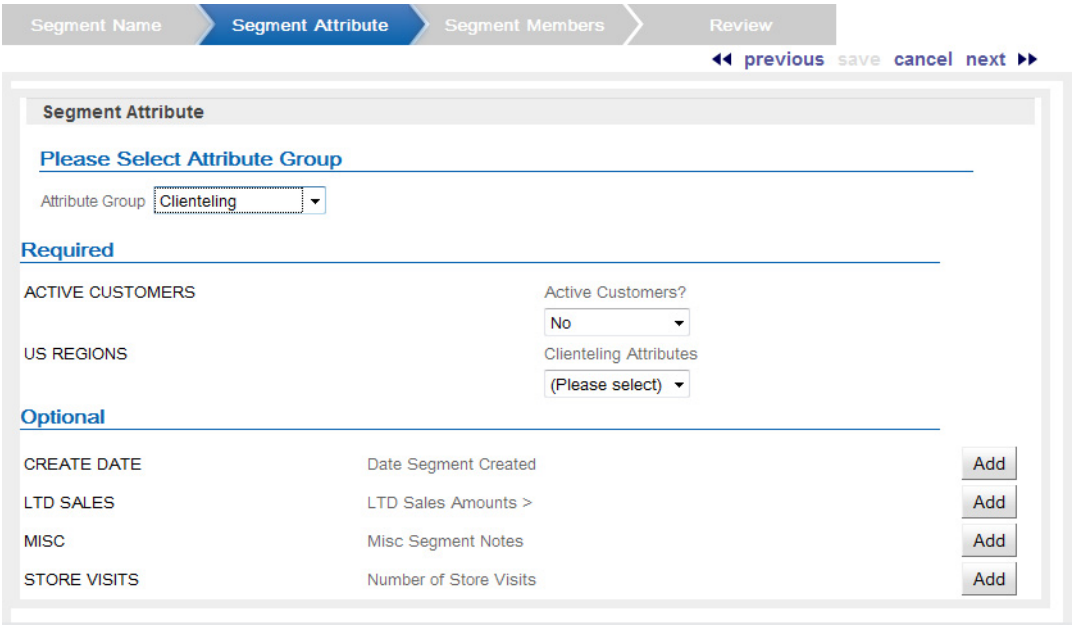


Figure 6-42: Segment Attribute Step - Attribute Group Selected

b. Select or enter the configuration values for each of the **Required** Attributes.

c. Add any necessary **Optional** Attribute(s):

1) Click the **Add** button for the Attribute to add.

A configuration field opens.

2) Select or enter the configuration value for the Attribute.

3) Repeat until all necessary Attribute(s) are configured.

d. Remove any unwanted Attributes by clicking the **Delete** button for each Attribute to remove.

The Attribute is deleted.

7. Click **next** when you are finished.

The Segment Members step opens.

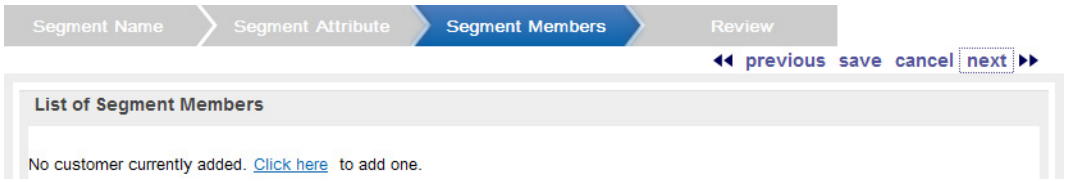


Figure 6-43: Segment Members Step

8. Add Customers to the Segment.

Use the following procedure to add Customers to a Manual Segment:

a. Click either the **Add Customer** or **Click here** Link (the Link depends upon whether or not the Segment currently contains one or more Customers).

A Search Customer Window opens.

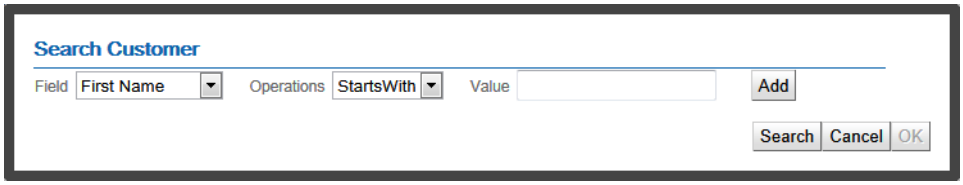


Figure 6-44: Search Customer Window

b. Use the Search Customer Window to enter search information, then click the **Search** button to search for Customers matching the search criteria.

A List of search results is displayed.

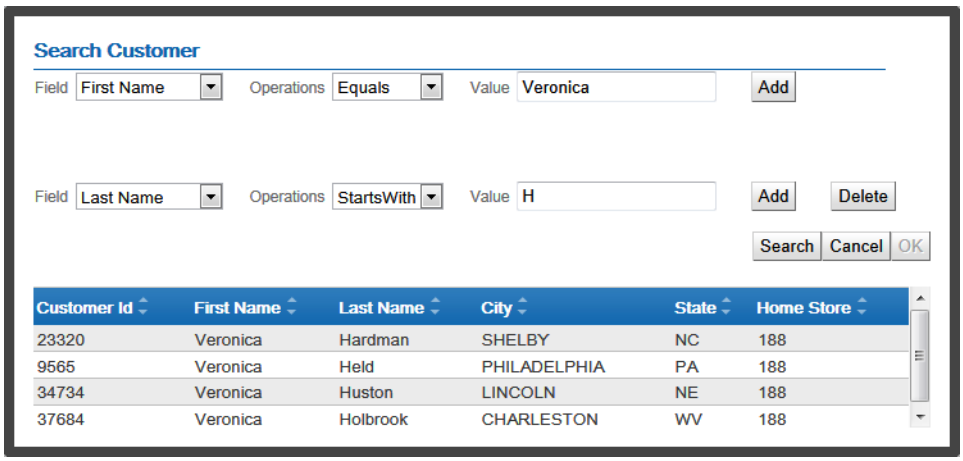


Figure 6-45: Customer Search Results

c. Click the Customer to add to the Manual Segment.

d. Click the **OK** button.

e. The Window closes and the Customer is added to the List of Segment Members.

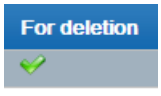
f. To add another Customer, repeat steps a-e.

9. To delete a customer from the Segment:

a. Click the Customer in the List of Segment Members.

b. Click the **Delete Customer** Link.

The Customer is tagged for deletion. The Customer will be deleted when the Segment is saved.



10. To undelete a customer in the Segment:

a. Click the Customer in the List of Segment Members.

b. Click the **Undelete Customer** Link.

The Customer is no longer tagged for deletion.

11. Click **next** when you are done editing the List of Segment Members.

    The Review step opens.

12. Review the entered information to ensure that it is correct.

    - ❑ Click **save** to save the Segment with the current settings and return to the Manual Segment List.
    - ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
    - ❑ Click **cancel** to delete all information and return to the Manual Segment List.

Edit Manual Segment

To edit a Manual Segment:

1. In the Manual Segment List, click the Segment to be edited.

   The Segment opens in a Manual Segment Window.

2. Click the **EDIT** button.

   The Segment opens in a Manual Segment Wizard. See "Create Manual Segment" on page 226 for more information about editing a Manual Segment.

3. Update the Manual Segment.

   - ❑ Use Wizard Navigation to move through the Segment.
   - ❑ Make any necessary changes.
   - ❑ Click **save** when you are finished making changes. The Segment will be saved and Relate will return to the Manual Segment List.
   - ❑ Click **cancel** to discard the changes, cancel the copy operation, and return to the Manual Segment List.

View Customer List

To view the customers in a Manual Segment:

1. In the Manual Segment List, click the Segment.

   The Segment opens in a Manual Segment Window.

2. In the Actions Menu, click **VIEW CUSTOMER LIST**.

   A List of Customers in the Segment is displayed in a Customer List.



The Customers in the Manual Segment cannot be edited in the Customer List. The Manual Segment can only be edited in the Manual Segment Wizard (see "Create Manual Segment" on page 226 for more information about editing a Manual Segment).

Delete Manual Segment

To delete a Manual Segment from Relate:

1. In the Manual Segment List, click the Segment.

   The Segment opens in a Manual Segment Window.

2. In the Actions Menu, click **DELETE**.

   A confirmation prompt opens.

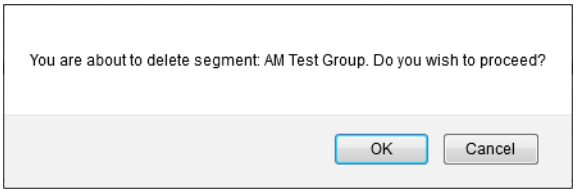


Figure 6-46: Delete Manual Segment Confirmation Prompt

3. Click **OK** to delete the Manual Segment and close the prompt and Manual Segment Window.

   Click **Cancel** to close the prompt and return to the Manual Segment Window.

CHAPTER 7

Promotions



Promotion management is NOT available in Relate if the Enable Promote Integration configuration is set to **True***.*

See also: The *Relate Configuration Guide* for more information.

Overview

In Relate, a Promotion defines an offer, within a Campaign, that is intended to provide some purchase incentive to Customers. These offers may be made available to all Customers, or they may be offered only to specified subsets of Customers. These offers may provide price incentives on a specific item, they may provide coupons to be redeemed during a purchase, they may be messages notifying Customers of special events or pricing, or they may provide tender certificates that a Customer can use at a later date.

Promotion Event Types

Relate has the following Promotion event types:

- **Coupon** - An offer that is made through embedded coupons placed in various media, such as magazines or newspapers.
- **Product** - An offer to receive monetary savings in exchange for the purchase of specific merchandise.
- **Coupon with Bounceback** - A Coupon offer that is generated for a Customer when that Customer demonstrates a certain purchase profile. The Coupon is intended to provide incentive for the Customer to make further purchases.
- **Product with Bounceback** - A Product offer that is generated for a Customer when the Customer demonstrates a certain purchase profile. The Coupon is intended to provide incentive for the Customer to make further purchases.

- **Message** - A Promotion that is used to send out communications that are not specifically associated with any Deals.
- **Award** - An offer in which certain Customers are awarded a tender certificate.
- **Entitlement** - An offer certain Customers can take advantage of a certain number of times and/or a certain number of times over a certain period of time.

Targeted Promotions

Targeted Promotions are Promotion Events that are delivered exclusively to one or more Customer Segments (see Chapter 6, “Segments” on page 187 for more information about Segments). Within the Promotion framework, a “Customer Segment” becomes a “Promotion Target” when it is attached to a specific Promotion Event.

More than one target can be defined and tracked within the Promotion Event.

One or more Segments can be combined into a single Promotion Target. Only unique Customer IDs will be added to the target as each Segment is added.

In addition, Relate CRM ensures that only unique Customer records are included in a Promotion Event across multiple targets. Customer records added to new targets are first netted out against the previously defined target(s). The first target created will always have the same number of unique Customer records as existed in the Segments.

Untargeted Promotions

Untargeted Promotion Events are Promotion Events delivered to the general population, rather than a specific set of Customers. Untargeted Promotion Events are often general sales events where awareness could be generated using a combination of media including: TV, Radio, Newspaper, and POP signage.

In Untargeted Promotions, the posting engine doesn’t evaluate the Customer ID in the transaction as a qualifier. Since the initial offer wasn’t targeted in advance, the offer and the response is put into the Customer history at the time the response is identified.

Social Media Listening

The Social Media Listening functionality in Relate provides the ability to manage and maintain social profile data for known customers, thereby enriching the customer database. A Promotion can be configured to check customers’ social media accounts and listen for customer posts that contain certain keywords defined for that Promotion. Through this, Relate provides retailers with the ability to better understand their customers and provide them with better service by learning what they do well and where they can improve their customer’s experience.

Control Groups

Best practices dictate that direct marketing strategy and tactics should be evaluated at least periodically. The primary method for doing this is for the marketer to set up a “test” and a “control” for a Promotional Event.

The “test” group is the target set that receives the new stimulus or offer. The “control” group is a statistically identical group that doesn't receive the stimulus or offer. Following the

promotional period, the results of the two groups are compared and the marketer can determine if the offer generated "incremental" revenue.

There are two methods for setting up a control group:

- **Promotion Level** - A balanced sample from a number of separate targets.

  In the event that multiple targets are being tracked, and the user wishes to generate a control group to measure the overall impact of the Promotion, then this option will randomly generate a "balanced control" group based on the available target counts. This means that the control group quantity will be generated proportionally based on the counts of the individual target groups.

- **Target Level** - An individual pairing of a test and a control.

  A control group is extracted from one or more targets, one at a time. This allows separate statistical conclusions to be made about each separate target within the group.

In either case, the key factor is that the control group is not included in the offer.

Promotion List

The Promotion List page is opened using the **Campaign->Promotion Definition** menu option, or by clicking the **Promotion Definition** Link on the Main Page.

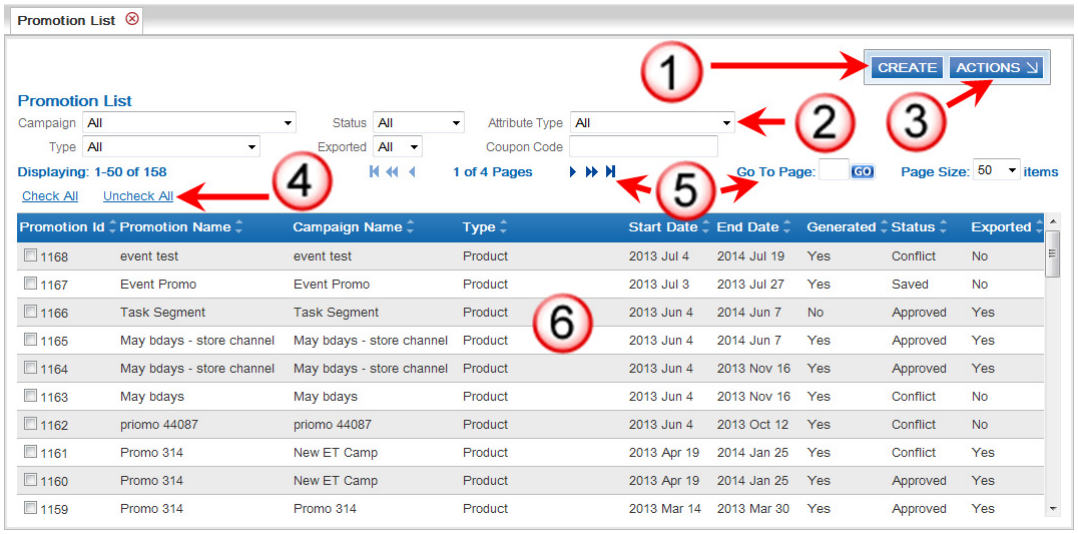


Figure 7-1: Promotions List

Table 7-1: *Promotion List Page Key*

Item	Description
1	**Create Button** - Click to create a new Promotion. See "Create a Promotion" on page 239 for more information.
2	**Filter Menus** - Select criteria in the Filter Menus to view a subset of the Promotions in the Promotion List. See "Filter Menus" on page 237 for more information.

Table 7-1: *Promotion List Page Key (continued)*

Item	Description
3	**Actions Menu** - Click to open a menu of actions that can be performed in the Promotion List page. See "Actions Menu" on page 236 for more information.
4	**Check Options** - Links to place or remove a check mark (☑) in each Check Box displayed in the current screen.
5	**Page Navigation** - Page Navigation for the List.
6	**Promotions** - A List of Promotions currently in the system. Use the Filter Menus to narrow down the List and locate a certain Promotion. This List includes the following information for each Promotion: ■ **Promotion ID** - Unique ID for the Promotion. ■ **Promotion Name** - Name of the Promotion. ■ **Campaign Name** - Name of the Campaign associated with the Promotion. ■ **Type** - Type of Promotion. ■ **Start Date** - Date on which the Promotion is first active. ■ **End Date** - Last date on which the Promotion is active. ■ **Generated** - Indicates whether the Target data for the Promotion has been generated. ■ **Status** - Current status of the Promotion. ■ **Exported** - Indicates whether the Promotion has been exported to external systems, including POS systems.

Actions Menu

The Actions Menu in the Promotion List page includes the following options:



- **APPROVE** - Approve selected Promotion(s). See "Bulk Approve" on page 238.
- **TERMINATE** - Terminate selected Promotion(s). See "Bulk Terminate" on page 238.
- **EXPORT** - Export selected Promotion(s). See "Bulk Export" on page 238.
- **REFRESH** - Refresh the Promotion List, displaying any updates.

Filter Menus

The Promotion List page includes the following Filter fields:

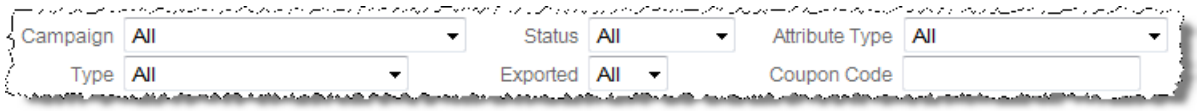


Figure 7-2: Filter Menus

- **Campaign** - Filters the List to show only the Promotions associated with a selected campaign. Select **All** **[DEFAULT]** to view Promotions for all campaigns.
- **Type** - Filters the List by the Type of Promotion. This filter has the following options:
  - **All** - **[DEFAULT]** Do not filter by Type; display all Promotion Types.
  - **Coupon** - Display only Coupon Promotions.
  - **Product** - Display only Product Promotions.
  - **Coupon with Bounceback** - Display only Coupon with Bounceback Promotions.
  - **Product with Bounceback** - Display only Product with Bounceback Promotions.
  - **Message** - Display only Message Promotions.
  - **Award** - Display only Award Promotions.
  - **Entitlement** - Display only Entitlement Promotions.
- **Status** - Filters the List by the current Promotion Status. This filter has the following options:
  - **All** - **[DEFAULT]** Do not filter by Status; display all Statuses
  - **Saved** - Display only Saved Promotions
  - **Terminated** - Display only Terminated Promotions
  - **Approved** - Display only Approved Promotions
  - **Clear** - Display only Promotions that have been Cleared
  - **Conflict** - Display only Promotions with Conflicts
- **Exported** - Filter the List by whether it has been exported. This filter has the following options:
  - **All** - **[DEFAULT]** Do not filter by Export Status; display both exported and unexported Promotions
  - **Yes** - Display only exported Promotions
  - **No** - Display only Promotions that have not been exported
- **Attribute Type** - Filters the List by an Attribute that can be assigned to the Promotion. Select **All** **[DEFAULT]** to view Promotions with all Attributes, including those that do not have any assigned Attributes.
- **Coupon Code** - Filters the List to view Promotion to which the Coupon Code was assigned.

Open a Promotion

To open a Promotion for viewing or updating, click the Promotion in the Promotion List. The Promotion will be displayed in a Promotion Window (see "Promotion Window" on page 240).

Bulk Approve

To approve multiple Promotions:

1. In the Promotion List, click to enter a check mark (☑) next to each Promotion to approve.
2. Click **Approve** in the Actions Menu.

   All the selected Promotions are approved.

Bulk Terminate

To terminate multiple Promotions:

1. In the Promotion List, click to enter a check mark (☑) next to each Promotion to terminate.
2. Click **Terminate** in the Actions Menu.

   All the selected Promotions are terminated.

Bulk Export

To export multiple Promotions:

1. In the Promotion List, click to enter a check mark (☑) next to each Promotion to export.
2. Click **Export** in the Actions Menu.

   All the selected Promotions are exported.

Create a Promotion

The process for creating a new Promotion in Relate depends upon the type of Promotion that is being created. To create a Promotion, start the New Promotion Wizard, determine the type of Promotion to create, then perform the proper steps to complete the Promotion.

New Promotion Wizard

To start the Promotion creation process, click **CREATE** in the upper-right corner of the Promotion List page.

The New Promotion Wizard opens on the Promotion Type step.

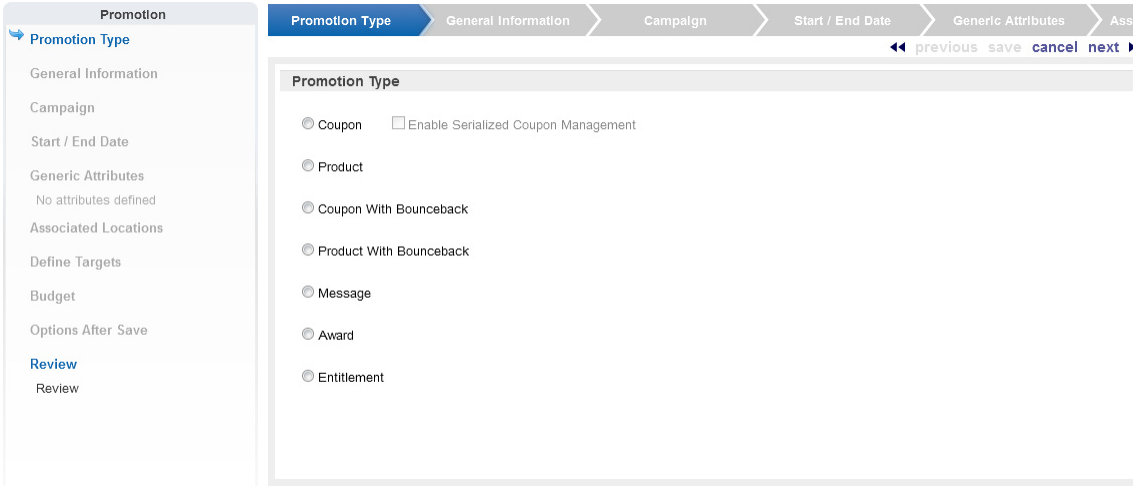


Figure 7-3: New Promotion Wizard

In the Promotion Type step, select the type of Promotion you are creating, then follow the procedure for that type of Promotion:

- **Coupon** - An offer that is made through embedded coupons placed in various media, such as magazines or newspapers. For more information about creating a Coupon Promotion, see Chapter 8, "Create a Coupon Promotion" on page 268.
- **Product** - An offer to receive monetary savings in exchange for the purchase of specific merchandise. For more information about creating a Product Promotion, see Chapter 9, "Create a Product Promotion" on page 294.
- **Coupon with Bounceback** - A Coupon offer that is generated for a Customer when that Customer demonstrates a certain purchase profile. The Coupon is intended to provide incentive for the Customer to make further purchases. For more information about creating a Coupon with Bounceback Promotion, see Chapter 10, "Create a Coupon with Bounceback Promotion" on page 319.



Serialized Coupons are not available with Bounceback Promotions.

- **Product with Bounceback** - A Product offer that is generated for a Customer when the Customer demonstrates a certain purchase profile. The Coupon is intended to provide incentive for the Customer to make further purchases. For more information about creating a Product with Bounceback Promotion, see Chapter 11, "Create a Product with Bounceback Promotion" on page 349.
- **Message** - A Promotion that is used to send out communications that are not specifically associated with any Deals. For more information about creating a Message Promotion, see Chapter 12, "Create a Message Promotion" on page 378.
- **Award** - An offer in which certain Customers are awarded a tender certificate. For more information about creating an Award Promotion, see Chapter 13, "Create an Award Promotion" on page 401.
- **Entitlement** - An offer in which Customers have a certain number of deals available to them during a certain period of time, see Chapter 14, "Create an Entitlement Promotion" on page 426.

Promotion Window

The Promotion Window displays information about the selected Promotion and provides access to actions that can be performed on the Promotion.

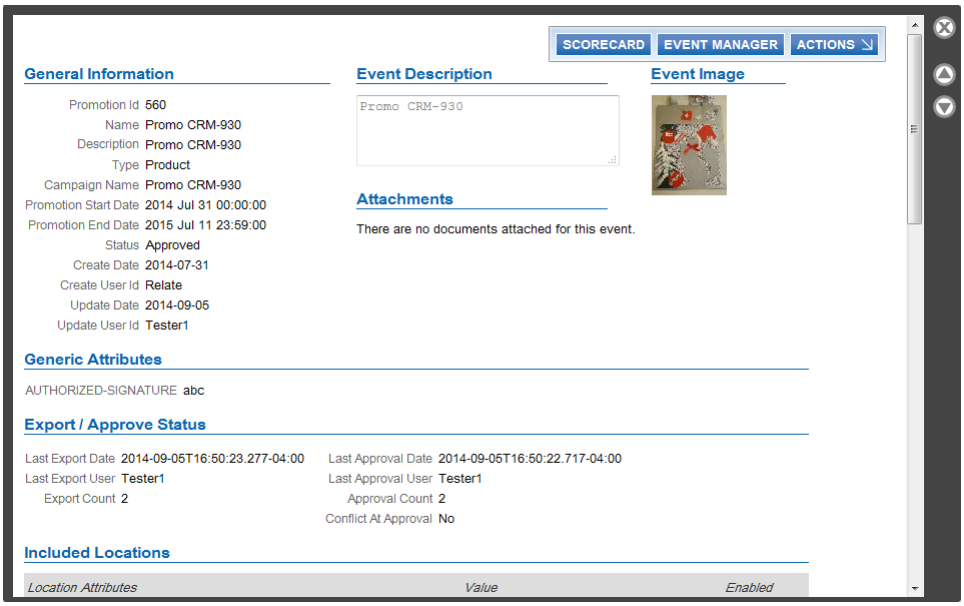


Figure 7-4: Promotion Window

The Promotion Window can include the following information about the Promotion:

> *Depending upon the configuration and/or status of the Promotion, some information may not be displayed.*

- **General Information** - General information about the Promotion. This includes the following information:

- **Promotion Id** - Unique ID for the Promotion.
- **Name** - The name of the Promotion.
- **Description** - A description of the Promotion.
- **Type** - The type of Promotion (Coupon, Product, or Message).
- **Campaign Name** - The name of the associated Campaign.
- **Promotion Start Date** - The date on which the Promotion begins.
- **Promotion End Date** - The final date of the Promotion.
- **Status** - Current status of the Promotion.
- **Create Date** - Date on which the Promotion was created.
- **Create User Id** - ID of the User who created the Promotion.
- **Update Date** - Most recent date on which the Promotion was updated.
- **Update User Id** - Last User to update the Promotion.

- **Social Listening** - Displays the social networks used by the social listening process (See below). *This information is only displayed for Promotions that use social listening.*
- **Event Description** - A description of the Promotion Event.
- **Attachments** - Links to files attached to the Promotion.
- **Event Image** - Displays an image associated with the Promotion.
- **Award Certificate** - The Certificate awarded by the Promotion. *This information is only displayed for Award Promotions.*
  - **Card Type Name** - Name of the Card Type receiving the Certificates.
  - **Award Program** - Award program receiving the Certificates.
  - **Award Validity Period** - Period of time during which the Certificate will be valid.
  - **Start Date** - First date on which the Certificate is valid.
  - **End Date** - Last date on which the Certificate is valid.
- **Generic Attributes** - The Generic Attributes assigned to the Promotion. This section displays the name of each Attribute assigned to the Promotion and its value.
- **Export/Approve Status** - Information about the export or approve status of the Promotion.
  - **Last Export Date** - Date on which the Promotion was most recently exported.
  - **Last Export User** - ID of the User who performed the most recent export.
  - **Export Count** - Number of times the Promotion has been exported.
  - **Last Approval Date** - Date on which the Promotion was most recently approved.
  - **Last Approval User** - ID of the User who performed the most recent approval.
  - **Approval Count** - Number of times the Promotion has been approved.
  - **Conflict at Approval** - Indicates whether there were any Conflicts at the most recent approval.

- **Included Locations** - The Locations included in the Promotion. This List displays the following information for each Location:
  - **Location Attributes** - The Attribute used to determine Location eligibility.
  - **Value** - The Attribute value used to determine Location eligibility.
  - **Enabled** - Indicates whether the Location inclusion rule is currently enabled.
- **Excluded Locations** - The Locations excluded from the Promotion. This List displays the following information for each Location:
  - **Location Attributes** - The Attribute used to determine Location exclusion.
  - **Value** - The Attribute value used to determine Location exclusion.
  - **Enabled** - Indicates whether the Location exclusion rule is currently enabled.
- **Associated Deals** - The Deals that are associated with the Promotion. This List displays the following information for each Deal:



Click a deal in the Associated Deals List to open the Deal in a Deal Window (see "Deal Window" on page 440 for more information).

  - **Deal Id** - Unique ID for the Deal.
  - **Deal Name** - Name of the Deal.
  - **Deal Type** - The type of Deal. This field has the following possible values:
    - **Transaction Discount** - A discount is applied to the subtotal of a transaction.
    - **Line Item Discount** - A discount is applied to a specific line item within a transaction.
    - **Fixed Quantity/Price** - A fixed price is assigned to defined item quantities.
    - **Kit** - A certain set of items, when purchased together, has a certain discount or special price associated with them.
    - **Gift with Purchase** - A gift is provided to the Customer for the purchase of a certain item(s).
    - **Buy X Get X** - The purchase of a certain, defined item allows the Customer to receive another of the same item at no cost.
    - **Buy X Get Y** - The purchase of a certain, defined item allows the Customer to receive a different item at no cost.
    - **Tiered Discount** - A discount is applied to a defined set of items, where the amount of the discount depends on the quantity of the item in the transaction.
  - **Deal Code** - The Deal Code for the Deal.
  - **Coupons Defined** - The number of Coupons defined for the Deal. *This field is only displayed for Coupon Promotions.*

    The field value provides a Link to View Coupon Codes for the Deal.
  - **Enabled** - Indicates whether the Deal is enabled for the Promotion.

- **Serialized Coupons** - Indicates whether the Coupons are serialized. *This field is only displayed for Coupon Promotions.*

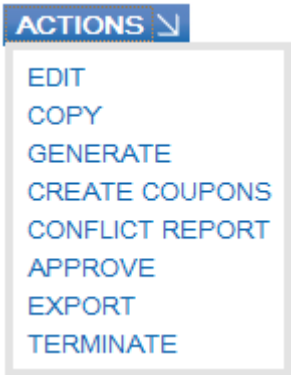
- **Promotion Targets** - Information about the Promotion targets.
  - **Promotion Targets** - Indicates the type of targeting used by the Promotion (**Non-exclusive** or **Exclusive**).
  - **Targeting Type** - Indicates whether the targeting is **Static** or **Dynamic**. *This field is only displayed for dynamically targeted Promotions.*
  - **Dynamic Targeting Option** - The method used to update the Target (**Targets Added Only** or **Targets Added and Removed**). *This field is only displayed for dynamically targeted Promotions.*

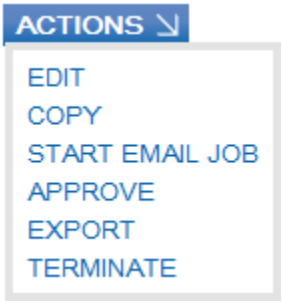
  Target List - This List displays the following information for each Target:
  - **Target Name** - The Name of the Target.
  - **Target Count Total** - The number of Customers in the Target.
  - **Control Group Count** - The number of Customers in the Target's Control Group. *This field only appears if a Control Group is configured.*
  - **Export Channels** - The possible export channels for the Target. Contact rules are displayed by channel:
    - **Mail** - Indicates whether the Target will be notified of the Promotion by mail.
    - **Email** - Indicates whether the Target will be notified of the Promotion by email.
    - **Phone** - Indicates whether the Target will be notified of the Promotion by telephone.
    - **ClientelingChannel** - Indicates whether Associates will notify the Target of the Promotion through the Clienteling Channel.
  - **Total** - The total number of Customers in all Targets.
- **Promotion Costs** - The overall costs of the Promotion.
  - **Budget Amount** - The amount budgeted for the overall costs of the Promotion.
  - **Actual Amount** - The actual amount of the overall costs of the Promotion.
- **Target Costs** - The Target-specific costs of the Promotion.
  - **Budget Amount** - The amount budgeted for Target-specific Promotion costs.
  - **Actual Amount** - The actual amount of Target-specific Promotion costs.
- **Social Listening** - The social media listening settings for the Promotion. *This information is only displayed for Promotions that use social listening.*
  - **Target Name** - The name of the target.
  - **Social Network** - The social network to which the Promotion is listening.
  - **Keyword(s) To Listen For** - The keyword(s) for which the Promotion is listening.

Actions Menu

The Actions Menu for the Promotion Window has the following options:

> *The options available in this menu will depend upon the configuration of the system and the current status of the Promotion. Some of the options below may not be available.*





- **EDIT** - Update or Edit the Promotion. See "Update a Promotion" on page 245.
- **COPY** - Open an editable copy of the Promotion. See "Copy a Promotion" on page 246.
- **GENERATE** - Generate the Promotion (this option only appears if the Promotion is targeted and the Target has not yet been generated). See "Generate a Promotion" on page 247.
- **CREATE COUPONS** - Create additional Serialized Coupons for the Promotion (this option only appears if the Promotion awards Serialized Coupons). See "Create Coupons" on page 247.
- **CONFLICT REPORT** - Open the Conflict Report for the Promotion (this option only appears if the Organization is configured to perform Promotion Conflict analysis). See "Conflict Report" on page 248.
- **START EMAIL JOB** - Run the job for generating and sending Promotion emails (this option only appears for non-terminated Message Promotions with an Email export channel). See "Start Email Job" on page 249.
- **APPROVE** - Approve the Promotion (this option only appears if the Promotion has not been approved). See "Approve a Promotion" on page 249.
- **EXPORT** - Export the Promotion. See "Export a Promotion" on page 249.
- **TERMINATE** - Terminate the Promotion. See "Terminate a Promotion" on page 249.

View Coupon Codes

To view the Coupon Codes associated with a Deal, click the Link in the Coupons Defined field. A Coupon Codes for Deal Window opens.

Coupon Codes for Deal Window

The Coupon Codes for Deal Window displays a List of the Coupon Codes for a Deal associated with a Promotion.

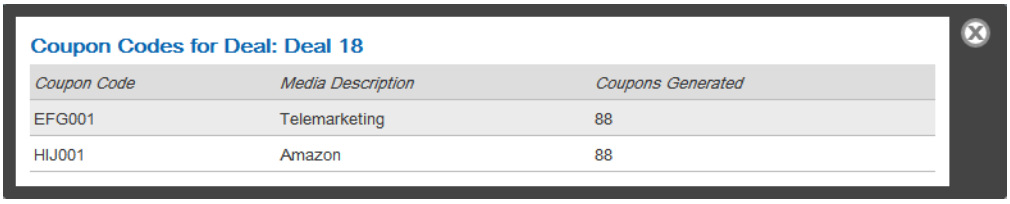


Figure 7-5: Coupon Codes for Deal Window

The Window displays the following information for each Coupon Code in the List:

- **Coupon Code** - Coupon Code for the Coupon.
- **Media Descriptor** - Description of the media for the coupon.
- **Coupons Generated** - Number of coupons generated with the Coupon Code.

Open Promotion Scorecard

Click **SCORECARD** in the Promotion Window to open the Promotion Scorecard for a Promotion from the Promotion Window. The Promotion is then opened in the Promotion Scorecard.

Update a Promotion

To update a Promotion, click **EDIT** in the Actions Menu in the Promotion Window.

The Promotion opens in the Promotion Wizard, with all of the editable fields populated with the current Promotion configurations.

- ❑ Use Wizard Navigation to move through the Wizard.
- ❑ Make any necessary changes.
- ❑ Click **save** when you are finished making changes. The Wizard closes, saving the entered configurations and returning to the Promotion List.
- ❑ Click **cancel** to exit the Wizard and return to the Promotion List without saving the changes.

For more information about the fields and information to be entered, see "Create a Promotion" on page 239.

Copy a Promotion

To create a new Promotion with the same configurations as the current Promotion:

Some information will not be copied from the existing Promotion to the new Promotion:

- ❑ Auto-created Campaigns
- ❑ End Dates in the past
- ❑ Coupon configurations
- ❑ Target information
- ❑ Options after saving

1. Click **COPY** in the Actions Menu for the Promotion Window.

A copy of Promotion opens in the Promotion Wizard, prompting for the action to perform on the current Promotion.

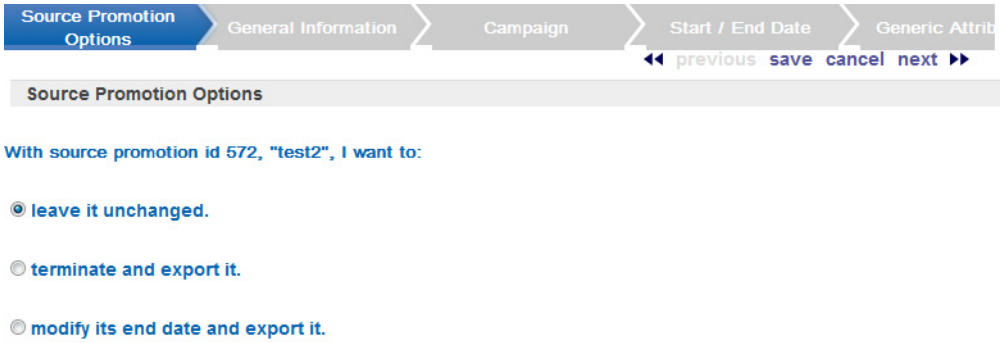


Figure 7-6: Source Promotion Options Step

2. Select the action to perform on the existing Promotion:

- ❑ **leave it unchanged** - Do nothing to change the existing Promotion.
- ❑ **terminate and export it** - Terminate the Promotion and export the termination to the POS systems.
- ❑ **modify its end date and export it** - Change the end date for the Promotion and export the Promotion, with its new end date, to the POS systems.

  If you select this option, Relate prompts for the new **End Date** and **End Time**.



Figure 7-7: New End Date and Time

  1) Select the new **End Date** for the existing Promotion in the Calendar Menu.

  2) Select the new **End Time** for the existing Promotion in the Time Menus.

3. Click **next**.

4. Edit the Promotion.
   - ❑ Use Wizard Navigation to move through the Wizard.
   - ❑ Make any necessary changes.
   - ❑ Click **save** when you are finished making changes. The Wizard closes, saving the new Promotion and returning to the Promotion List.
   - ❑ Click **cancel** to exit the Wizard and return to the Promotion List without saving the new Promotion.

   For more information about the fields and information to be entered, see "Create a Promotion" on page 239.

Generate a Promotion

Generating a Promotion creates a list of Customers targeted by the Promotion. This list is created based upon the Target Segments associated with the Promotion.

To Generate a Promotion, click **GENERATE** in the Actions Menu for the Promotion Window. A Job starts to generate the Promotion. The results can be viewed through the Process Queue. See Chapter 22, "Process Queue" on page 608 for more information.

Create Coupons

The Create Coupons option is used to create additional Coupons for a Promotion that issues Serialized Coupons. To create additional Serialized Coupons for a Coupon Promotion:

1. Click **CREATE COUPONS** in the Actions Menu for the Promotion Window.

   The Create Coupons Window opens.

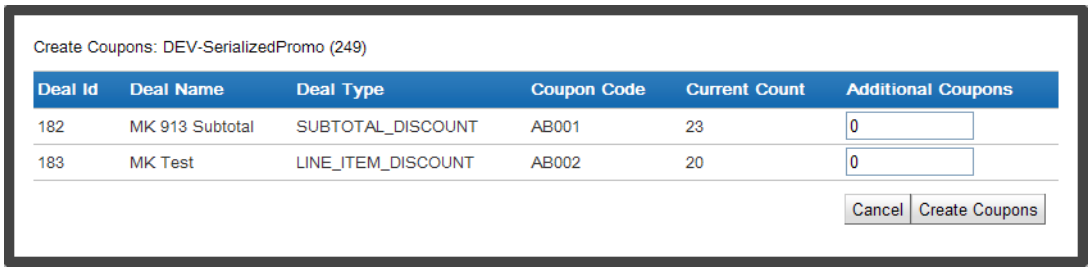


Figure 7-8: Create Coupons Window

2. In the **Additional Coupons** field(s) for each Deal in the Window, enter the number of additional Coupons to create.
3. Click the **Create Coupons** button.

   The Create Coupons Window closes, a confirmation message is displayed and the Create Coupons Job is submitted. Use the Process Queue to view the Job progress (see Chapter 22, "Process Queue" on page 608 for more information).

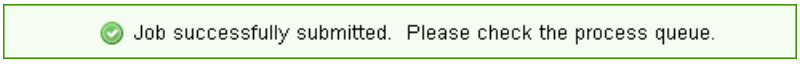


Figure 7-9: Job Submitted Successfully

Conflict Report

To view a Conflict Report, click **CONFLICT REPORT** in the Actions Menu for the Promotion Window. If the Promotion has conflicts, the Conflict Report opens.

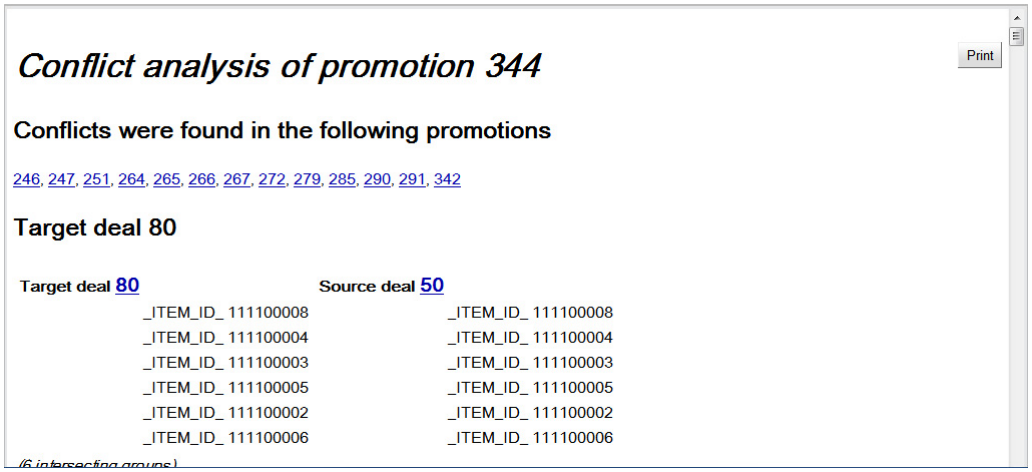


Figure 7-10: Conflict Report

The Conflict Report displays the following information:

- **Conflicts were found in the following promotions** - This section displays the IDs of Deals that conflict with Deals in the Promotion.
- **Target Deal XX** - Where **XX** is the ID for the Deal within the Promotion that is being conflicted with, this section displays the conflicts for Deal **XX**. For each Target Deal, the following information is displayed for each conflict with the Deal:
  - **Target Deal XX** - The Deal in the Promotion that is being conflicted with. This section displays the following information:
    - **Hierarchy Type** - The Type of Item Hierarchy in the Target Deal that is being conflicted.
    - **Hierarchy ID** - The Hierarchy ID in the Target that is being conflicted.
  - **Source deal XX** - The Deal that is conflicting with the Deal in the Promotion. This section displays the following information:
    - **Hierarchy Type** - The Type of Item Hierarchy in the Target Deal that is the source of the conflict.
    - **Hierarchy ID** - The Hierarchy ID in the Target that is the source of the conflict.
  - **(Conflict Description)** - Describes the conflict between the Target Deal and the Source Deal.
  - **Target deal XX is contained in multiple promotions** - This message is displayed if the Target deal is contained in other Promotions.
- **Cross-reference of deals to promotions** - This section displays cross-references from Deals to Promotions. For each Deal in the Conflict Report, there is a line displaying the Promotions that use the Deal.

- **Cross-reference of promotions to deal** - This section displays cross-references from Promotions to Deals. For each Promotion in the Conflict Report, there is a line displaying the conflicting Deals that are used by that Promotion.

Start Email Job

To start the email job for a Promotion, click **START EMAIL JOB** in the Actions Menu for the Promotion Window. The Promotion status is set to Approved.

Approve a Promotion

To approve a Promotion, click **APPROVE** in the Actions Menu for the Promotion Window. The Promotion status is set to Approved.

Export a Promotion

To export a Promotion, click **EXPORT** in the Actions Menu for the Promotion Window. The Promotion and associated Deal information is saved to an XML file.

Terminate a Promotion

To terminate a Promotion, click **TERMINATE** in the Actions Menu for the Promotion Window. The Promotion is terminated.

Promotion Scorecard

The Promotion Scorecard displays information metrics about the Customer response to a Promotion.

There will be one or more tabs displayed in the Promotion Scorecard, depending upon the Promotion type.

- For Message Promotions, the Promotion Scorecard will display the following tabs:
  - Scorecard - General information about the Promotion.
  - Email Send Overview - Information about the emails sent by the promotion. *To view data on this page, you must Select an Email Job (see below).*
  - Click Activity - Information about how often email recipients clicked on a link in an email. *To view data on this page, you must Select an Email Job (see below).*
  - Facebook Scorecard - Information about social listening results from Facebook.
  - Twitter Scorecard - Information about social listening results from Twitter.
- For all other Promotion types, the Promotion Scorecard will display only the Scorecard tab.

Select an Email Job

In the Email Send Overview and Click Activity tabs, data is displayed for a single email job; this email job must be selected. To select an email job, do the following:

1. Use the **Select Email Template** Selection Menu to select an email template.

   The Select Job ID/Date Sent Selection Menu is populated.

2. Use the **Select Job ID/Date Sent** Selection Menu to select the job run.

   A graphical summary of the responses to the Email Job is displayed.

Scorecard

The Scorecard tab displays the following information:

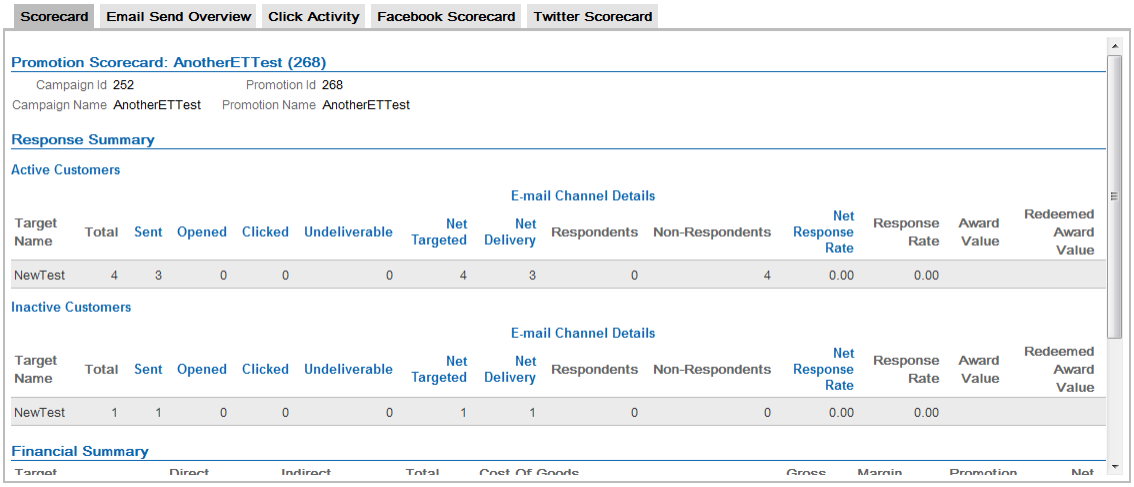


Figure 7-11: Scorecard Tab

- **Promotion Scorecard: [Promotion Name (Promotion ID)]** - This section contains basic information about the Promotion.
  - **Campaign Id** - ID number of the Campaign to which the Promotion belongs.
  - **Campaign Name** - Name of the Campaign to which the Promotion belongs.
  - **Promotion Id** - ID number of the Promotion.
  - **Promotion Name** - Name of the Promotion.
- **Response Summary** - This section contains information about the responses to the Promotion.
  - **Active Customers** - This section contains a List of response information about the Targets who are currently included in the Promotion. The List displays the following information for each Target Segment:
    - **Target Name** - Name of the Target.
    - **Total** - Number of Customers to whom emails were sent. *Part of the E-mail Channel Details.*
    - **Sent** - Number of emails sent. *Part of the E-mail Channel Details.*

- **Opened** - Number of emails opened. *Part of the E-mail Channel Details.*
- **Clicked** - Number of emails clicked on. *Part of the E-mail Channel Details.*
- **Undeliverable** - Number of emails that could not be delivered. *Part of the E-mail Channel Details.*
- **Net Targeted** - Number of Customers in the Target.
- **Net Delivery** - Net number of emails delivered.
- **Respondents** - Number of Customers in the Target who have responded to the Promotion.
- **Non-Respondents** - Number of Customers in the Target who have not responded to the Promotion.
- **Net Response Rate** - Of those Customers in the Target to whom a message was successfully sent, the percentage who have responded to the Promotion.
- **Response Rate** - The percentage of Customers in the Target who have responded to the Promotion.

- **Inactive Customers** - This section contains a List of response information about the Targets who are no longer included in the Promotion. The List displays the following information for each Target Segment:
  - **Target Name** - Name of the Target.
  - **Total** - Number of Customers to whom emails were sent. *Part of the E-mail Channel Details.*
  - **Sent** - Number of emails sent. *Part of the E-mail Channel Details.*
  - **Opened** - Number of emails opened. *Part of the E-mail Channel Details.*
  - **Clicked** - Number of emails clicked on. *Part of the E-mail Channel Details.*
  - **Undeliverable** - Number of emails that could not be delivered. *Part of the E-mail Channel Details.*
  - **Net Targeted** - Number of Customers who were formerly in the Target.
  - **Net Delivery** - Net number of emails delivered.
  - **Respondents** - Number of Customers in the Target who are no longer targeted by the Promotion, and have responded to the Promotion.
  - **Non-Respondents** - Number of Customers in the Target who are no longer targeted by the Promotion, and have not responded to the Promotion.
  - **Response Rate** - The percentage of Customers in the Target who have responded to the Promotion.

- **Bounceback Response Summary** - This section contains a List for each Segment Target, showing the response rate to the Bounceback portion of the Promotion. This List displays the following information for each Target:

- **Target Name** - Name of the Target.



The Target may be a Customer Segment, Control Group, or Target Split.

The following Deal information is displayed for each Target:

- **Deal Id** - Deal ID for the Bounceback.
- **Deal Name** - Name of the Deal.
- **Prefix** - Prefix for the Bounceback Coupon.
- **Total Coupons Issued** - Total number of Bounceback Coupons issued by the Deal.
- **Total Coupons Redeemed** - Total number of Bounceback Coupons redeemed for the Deal.

- **Financial Summary** - This section contains a List displaying financial data about the Segment Target responses to the Promotion. This List displays the following information for each Target:
  - **Target Name** - Name of the Target.
  - **Direct Revenue** - Direct Revenue received from the Target.
  - **Indirect Revenue** - Indirect Revenue received from the Target.
  - **Total Revenue** - Total Revenue (Direct + Indirect) received from the Target.
  - **Cost Of Goods Sold** - Total cost of goods sold to the Target.
  - **Markdowns** - Value of markdowns applied to the purchases made by the Target.
  - **Gross Profit** - Gross Profit of sales made to the Target.
  - **Margin %** - Profit percentage of sales made to the Target.
  - **Promotion Cost** - Cost of the Promotion for the Target.
  - **Net Profit** - Net Profit of sales made to the Target.
- **Deal Summary** - This section contains information about the Deals used by the Promotion. These Deals are organized by Target. The following information is displayed for each Target:

  Target: - The name of a Target for the Promotion.



The Target may be a Customer Segment, Control Group, or Target Split.

The following Deal information is displayed for each Target:

- **Deal Id** - Unique ID for the Deal.
- **Deal Name** - Name of the Deal.
- **Direct Revenue** - Direct revenue received through the Deal.

- **Coupon List** - If the Promotion is a Coupon Promotion, a List of Coupon Codes associated with the Deal is included. The following information is displayed for each Coupon Code:
  - **Coupon Code** - ID Code for the Coupon.
  - **Respondents** - Number of Customers who redeemed a Coupon.
  - **Transactions** - Number of Transactions in which a Coupon with the Coupon Code was redeemed.
  - **Value of Discount** - Total amount of the discounts given through the Coupons.
  - **Average Sales By Coupon** - Average amount of the sales in the Transactions in which the Coupons were redeemed.
  - **Coupon Revenue** - Total amount of the revenue received through the Coupon Code.
  - **Estimated Distribution** - Estimated number of Coupons distributed to Customers.
  - **Response %** - Percentage of Coupons distributed that have been redeemed.

- **Additional Metrics** - This section displays a List of additional sales metrics for the Promotion. The List contains the following information for each Target:
  - **Target Name** - The name of the Target.
  - **Promotion Cost Per Targeted Customer** - Cost of the Promotion per Customer targeted by the Promotion.
  - **Promotion Cost Per Responded Customer** - Cost of the Promotion per Customer who responded to the Promotion.
  - **Revenue Per Targeted Customer** - Revenue received per Customer who was targeted by the Promotion.
  - **Revenue Per Responded Customer** - Revenue received per Customer who responded to the Promotion.
  - **Net Profit Per Targeted Customer** - Net Profit per Customer who was targeted by the Promotion.
  - **Net Profit Per Responded Customer** - Net Profit per Customer who responded to the Promotion.

Email Send Overview

This tab displays graphical summaries of the responses for one email job using one email template within a Message Promotion.

Use the **Select Email Template** Selection Menu and the **Select Job ID/Date Sent** Selection Menu to choose the template and job to view. See "Select an Email Job" on page 250 for more information.

The Email Send Overview tab displays the following information:

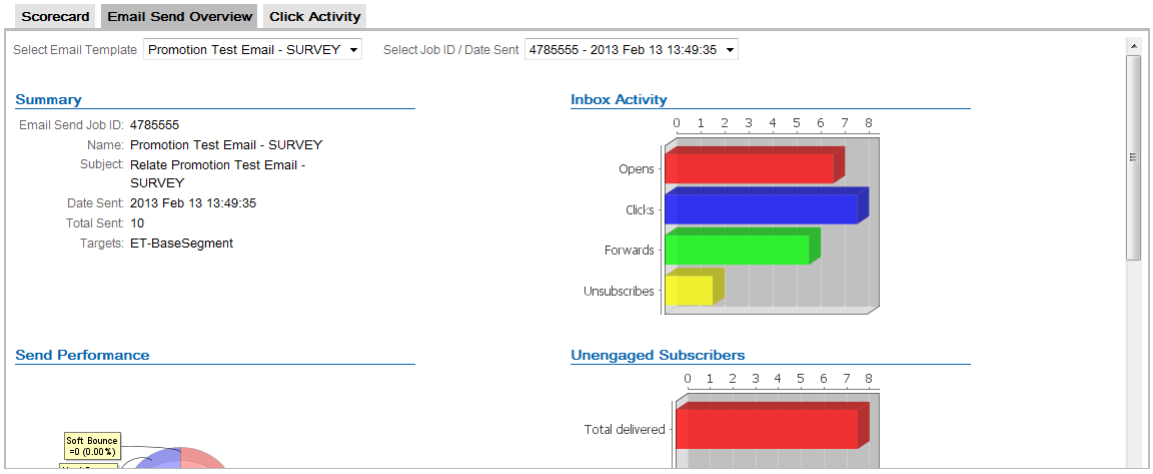


Figure 7-12: Email Send Overview Tab

- **Summary** - Summary of the Job.

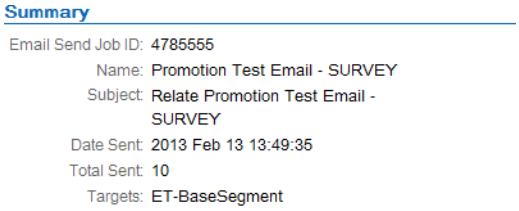


Figure 7-13: Summary

  - **Email Send Job ID** - ID of the Job run.
  - **Subject** - Subject of the Job.
  - **Date Sent** - Date on which the emails were sent.
  - **Total Send** - Total number of emails sent.
  - **Targets** - Segment targets.

- **Inbox Activity** - Activities performed on the emails by the recipients.

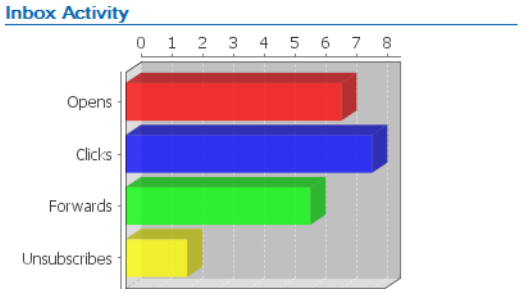


Figure 7-14: Inbox Activity

  - **Opens** - Number of recipients who opened the email.
  - **Clicks** - Number of recipients who clicked on a link in the email.
  - **Forwards** - Number of recipients who forwarded the email to another person.
  - **Unsubscribes** - Number of recipients who used this email to unsubscribe from the mailing list.
- **Send Performance** - Whether emails were successfully delivered.

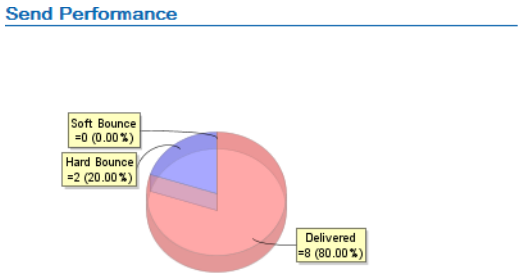


Figure 7-15: Send Performance

  - **Delivered** - The number/percentage of emails that were successfully delivered.
  - **Hard Bounce** - The number/percentage of emails that were returned to the email server as undeliverable (e.g. the email address is invalid).
  - **Soft Bounce** - The number/percentage of emails that could not be delivered due to a software or space problem (e.g. the server is busy or down, or the recipient's mailbox is full).
- **Unengaged Subscribers** - Email recipients who did not perform any activity with the email.

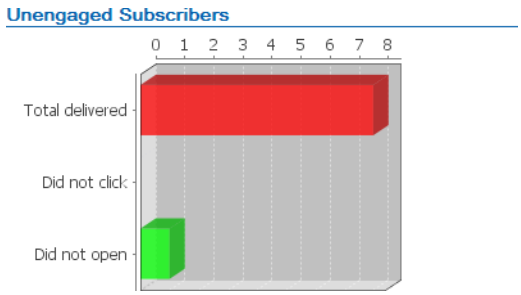


Figure 7-16: Unengaged Subscribers

- **Total delivered** - Number of successfully delivered emails.
- **Did not click** - Number of recipients who did not click a link in the email.
- **Did not open** - Number of recipients who did not open the email.

- **Open Performance** - How often recipients opened the email.

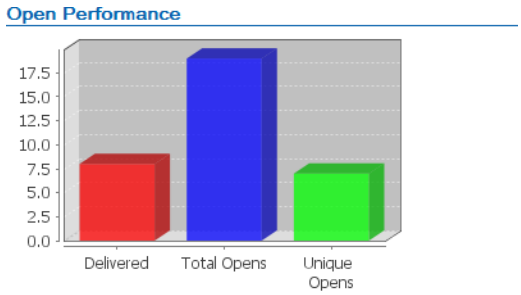


Figure 7-17: Open Performance

- **Delivered** - Number of successfully delivered emails.
- **Total Opens** - Total number of times recipients opened the email.
- **Unique** - Number of unique addresses that opened the email.

- **Forward To A Friend Activity** - How often recipients forwarded the email.

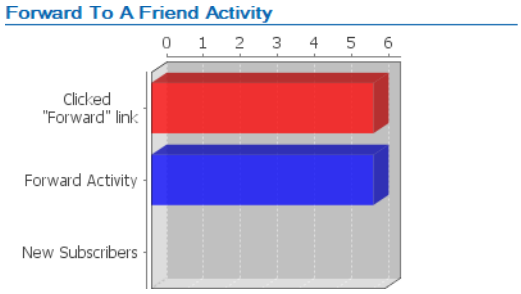


Figure 7-18: Forward To A Friend Activity

- **Clicked "Forward" Link** - Number of recipients who used the "Forward" link in the email to forward it to another person.
- **Forward Activity** - Number of recipients who forwarded the email.
- **New Subscribers** - Number of people who subscribed to the email list through a forwarded email.

Click Activity

The Click Activity tab displays the email template used for the email. This includes active links that can be clicked and checked for accuracy.

Use the **Select Email Template** Selection Menu and the **Select Job ID/Date Sent** Selection Menu to choose the template and job to view. See "Select an Email Job" on page 250 for more information.

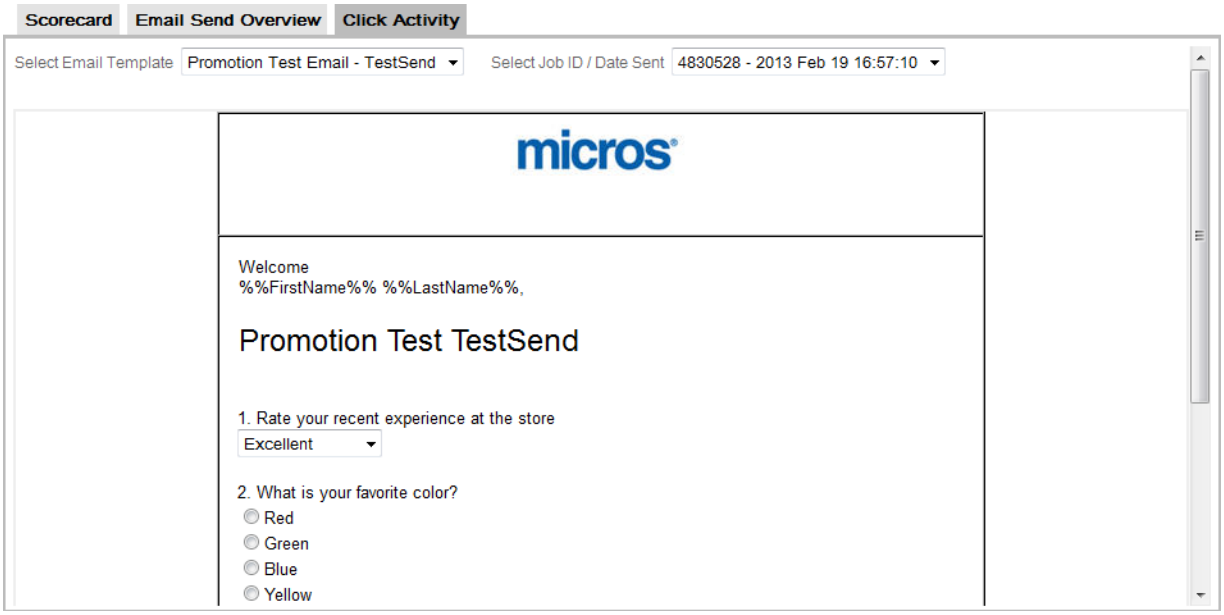


Figure 7-19: Click Activity Tab

Facebook Scorecard

The Facebook Scorecard tab displays the social listening results for one social profile on Facebook.

Use the **Social Profile** Selection Menu to select the social profile to view.

The Facebook Scorecard displays the following information for the Promotion:

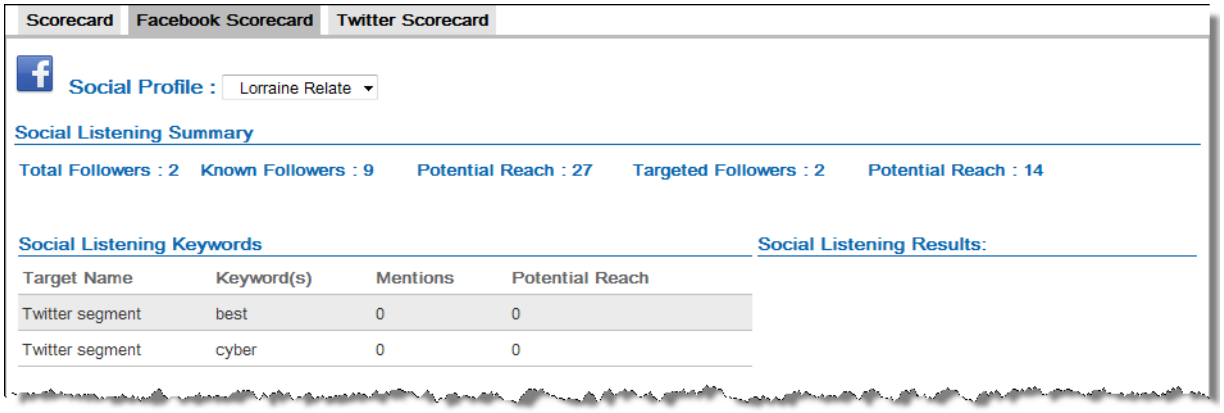


Figure 7-20: Facebook Scorecard Tab

- **Social Listening Summary** - Summarizes the number of people who are likely to see the Facebook posts for this social profile.
  - **Total Followers** - Number of fans/followers of the social profile. This includes people whose Facebook accounts are **not** in the Relate database.
  - **Known Followers** - Number of Customers in Relate with Facebook accounts associated with the social profile. This includes Customers **not** targeted by the Promotion.
  - **Potential Reach** - Number of Facebook friends of all the Known Followers.
  - **Targeted Followers** - Number of Known Followers targeted by the Promotion.
  - **Potential Reach** - Number of Facebook friends of the Targeted Followers.
- **Social Listening Keywords** - Displays information about the keyword(s) listened for by the Promotion. Click a row to view the messages, in the Social Listening Results section, containing the keyword(s).
  - **Target Name** - Name of the Promotion Target.
  - **Keyword(s)** - Keywords listened for by the Promotion.
  - **Mentions** - Number of Facebook posts made by targeted Customers that contain the keyword(s).
  - **Potential Reach** - Number of people who may have seen the posts containing the keyword(s). This is the number of Facebook friends of targeted Customers who have made posts containing the keyword(s).
- **Social Listening Results** - Displays the messages found by the social listener. *You must click a keyword set in Social Listening Keywords to view messages in this area.*

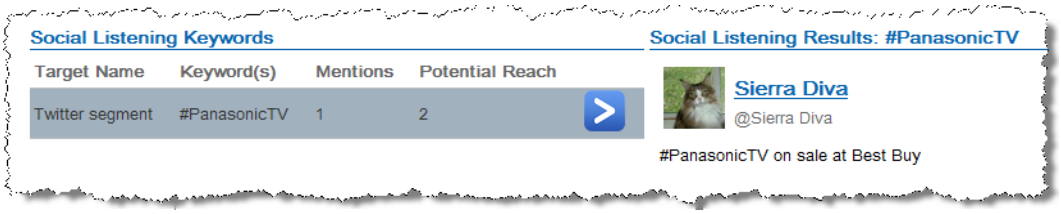


Figure 7-21: Social Listening Results

Twitter Scorecard

The Twitter Scorecard tab displays the social listening results for one social profile on Twitter.

Use the **Social Profile** Selection Menu to select a social profile to view.

The Twitter Scorecard displays the following information for the Promotion:

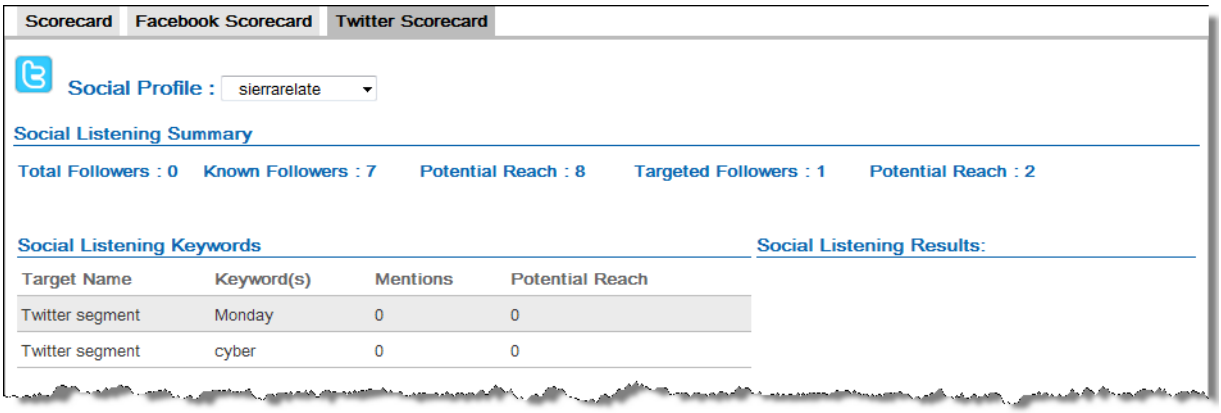


Figure 7-22: Twitter Scorecard Tab

- **Social Listening Summary** - Summarizes the number of people who are likely to see the Twitter posts for this social profile.
  - **Total Followers** - Number of followers of the social profile. This includes people whose Twitter accounts are **not** in the Relate database.
  - **Known Followers** - Number of Customers in Relate with Twitter accounts associated with the social profile. This includes Customers **not** targeted by the Promotion.
  - **Potential Reach** - Number of Twitter followers of all the Known Followers.
  - **Targeted Followers** - Number of Known Followers targeted by the Promotion.
  - **Potential Reach** - Number of Twitter followers of the Targeted Followers.
- **Social Listening Keywords** - Displays information about the keyword(s) listened for by the Promotion. Click a row to view the messages, in the Social Listening Results section, containing the keyword(s).
  - **Target Name** - Name of the Promotion Target.
  - **Keyword(s)** - Keywords listened for by the Promotion.
  - **Mentions** - Number of Twitter posts, by targeted Customers, containing the keyword(s).
  - **Potential Reach** - Number of people who may have seen the posts containing the keyword(s). This is the number of Twitter followers of targeted Customers who have made posts containing the keyword(s).

- **Social Listening Results** - Displays the messages found by the social listener. *You must click a keyword set in Social Listening Keywords to view messages in this area.*

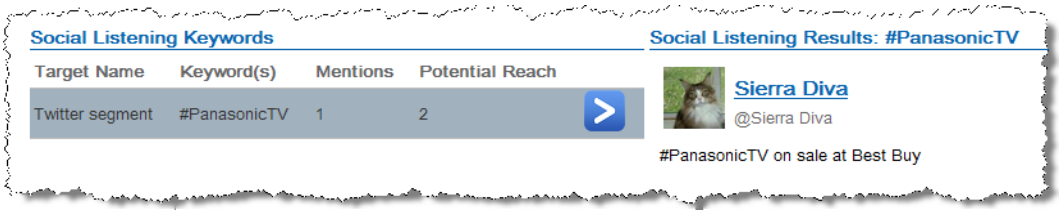


Figure 7-23: Social Listening Results

Event Manager

> *The Event Manager can only be opened for Promotions in which, during the Export Channels step in the Create a Promotion procedure, the* **Channel Filter** *option was enabled for at least one Target.*

The Event Manager allows Users to view a Promotion Event and manage Event Tasks created by and associated with a Promotion. The Event Manager displays the following information:

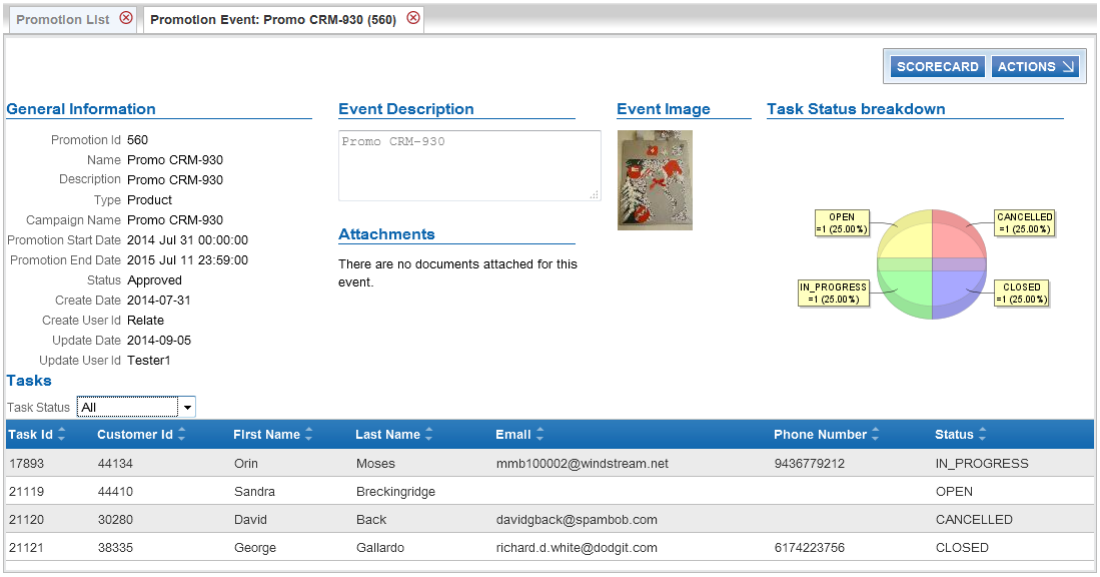


Figure 7-24: Event Manager

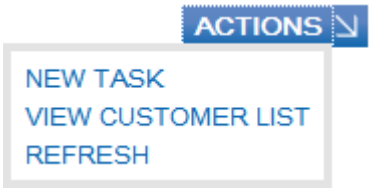
- **General Information** - General Information about the Promotion Event. This includes the following:
  - **Promotion Id** - ID of the Promotion.
  - **Name** - Name of the Promotion.
  - **Description** - Description of the Promotion.
  - **Type** - Promotion type.

- **Campaign Name** - Name of the Campaign to which the Promotion belongs.
- **Promotion Start Date** - Date and time on which the Promotion becomes effective.
- **Promotion End Date** - Date and time on which the Promotion is last effective.
- **Status** - Status of the Promotion.
- **Create Date** - Date and time at which the Promotion was created.
- **Create User Id** - ID of the User who created the Promotion.
- **Update Date** - Date and time at which the Promotion was last updated.
- **Update User Id** - ID of the User who most recently updated the Promotion.

- **Event Description** - Description of the Promotion Event.
- **Attachments** - Links to files attached to the Promotion Event.
- **Task Status breakdown** - Chart of the Tasks associated with the Promotion Event, displaying the number of percentage of Tasks with each Task status.
- **Task Status** - Filters the List to show only the Tasks with the Task Status selected. This Selection Menu has the following options:
  - **All** - Show Tasks of all statuses.
  - **OPEN** - **[DEFAULT]** Show only open Tasks.
  - **IN_PROGRESS** - Show only Tasks that are in progress.
  - **CANCELLED** - Show only Tasks that have been cancelled.
  - **CLOSED** - Show only Tasks that have been closed.
- **Tasks** - List of the Tasks associated with the Promotion Event. This List displays the following information for each Task:
  - **Task Id** - ID of the Task.
  - **Customer Id** - ID of the Customer associated with the Task.
  - **First Name** - Customer first name.
  - **Last Name** - Customer last name.
  - **Email** - Email address of the Customer.
  - **Phone Number** - Phone number of the Customer.
  - **Status** - Status of the Task.

Actions Menu

The Actions Menu for the Event Manager has the following options:



- **NEW TASK** - Add a new Task to the Promotion Event. See "Add a Task" on page 262.
- **VIEW CUSTOMER LIST** - View the list of Customers associated with the Promotion Event. See "Contact List" on page 264.
- **REFRESH** - Refresh the screen to view any updates.

Open a Task

To open a Task in the Event Manager, click the Task in the Task List. The Task opens in an Edit Task Window.

Open Promotion Scorecard

To open the Promotion Scorecard for the Promotion associated with the Promotion Event, click, the **SCORECARD** button. The Promotion is opened in a Promotion Scorecard.

Add a Task

To add a Task to a Promotion Event:

1. Click the **NEW TASK** button in the Event Manager Actions Menu.

   A Create New Task Window opens.

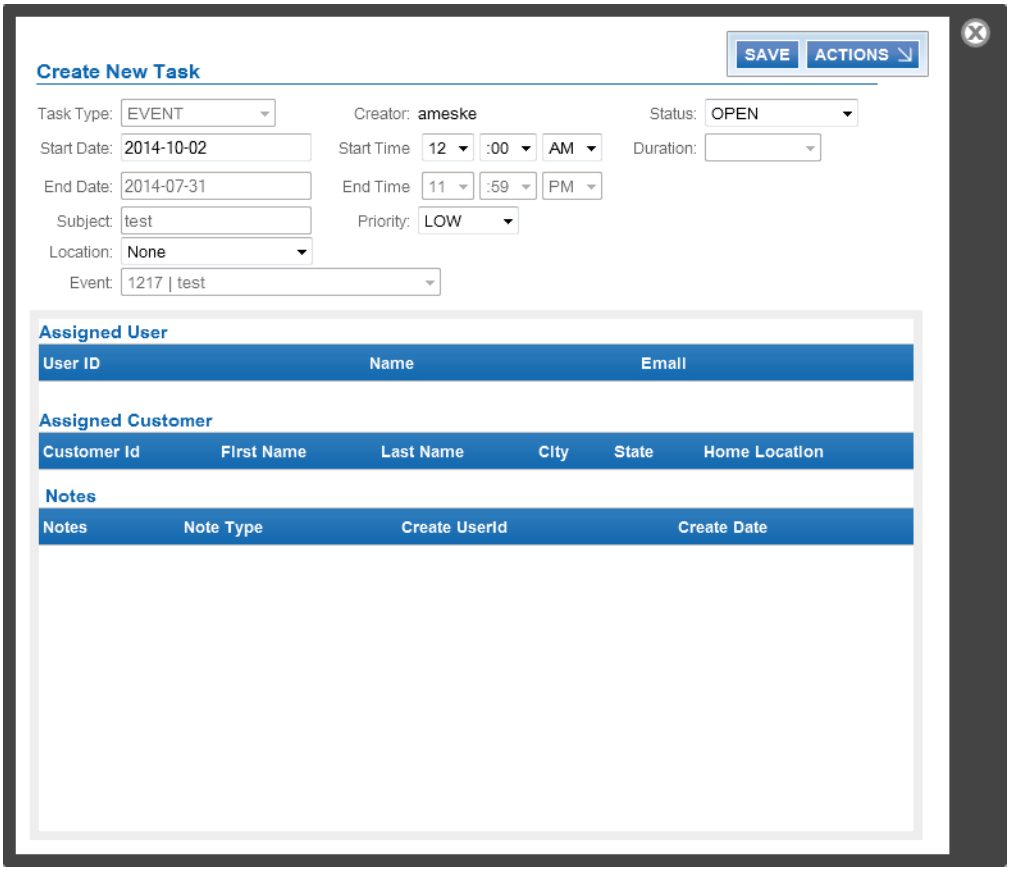


Figure 7-25: Create New Task Window

2. Enter the information for the Task:



Most of the fields in this Window cannot be edited. For a description of all of the fields in the Window, see "Edit Task Window" on page 598.

- **Location** - This Selection Menu determines the Location where the Task is to be performed.
- **Status** - The status of the Task.
- **Duration** - The duration of the Task.



Use this field to automatically set the End Time to a time, of the selected duration, after the selected Start Time. The End Time Time Menus cannot be edited directly.

3. If necessary, assign a User to the Task (see "Add/Change User" on page 601). The **Assigned User** List displays the User assigned to the Task.

   The following information is displayed for the assigned User:

   - **User ID** - ID of the User.
   - **Name** - Name of the User.
   - **Email** - Email of the User.

4. Associate a Customer with the Task (see "Add/Change Customer" on page 602). The **Assigned Customer** List displays the Customer associated with the Task.

   The following information is displayed for the associated Customer:

   - **Customer Id** - ID of the Customer.
   - **First Name** - Customer first name.
   - **Last Name** - Customer last name.
   - **City** - Customer city.
   - **State** - Customer state.
   - **Home Location** - Home location for the Customer.

5. If necessary, add a Note(s) to the Task (see "Add a Note" on page 603). The **Notes** List displays the Notes added to the Task.

   The following information is displayed for the Notes:

   - **Notes** - Text of the Note.
   - **Note Type** - Type of Note.
   - **Create UserId** - ID of the User who entered the Note.
   - **Create Date** - Date the Note was created.

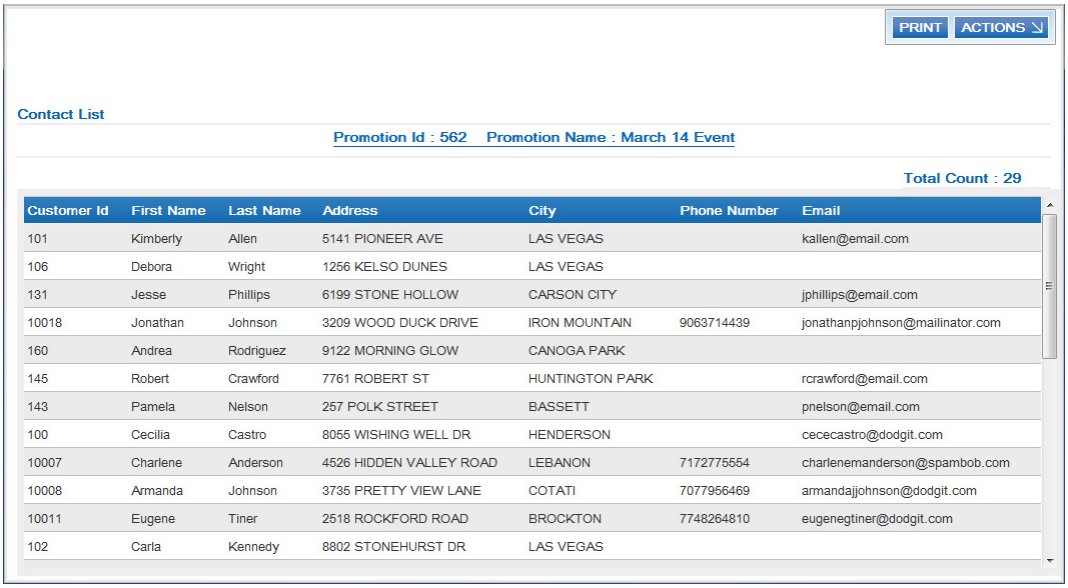
6. Click **SAVE** to create the Task and close the Window.

   To close the Window without saving changes, click the **X** () in the top-right corner.

Contact List

To view a List of Customers associated with a Promotion Event, click **VIEW CUSTOMER LIST** in the Event Manager Actions Menu.

A List of Customers associated with the Promotion is displayed in a Contact List.



Customer Id	First Name	Last Name	Address	City	Phone Number	Email
101	Kimberly	Allen	5141 PIONEER AVE	LAS VEGAS		kallen@email.com
106	Debora	Wright	1256 KELSO DUNES	LAS VEGAS		
131	Jesse	Phillips	6199 STONE HOLLOW	CARSON CITY		jphillips@email.com
10018	Jonathan	Johnson	3209 WOOD DUCK DRIVE	IRON MOUNTAIN	9063714439	jonathanpjohnson@mailinator.com
160	Andrea	Rodriguez	9122 MORNING GLOW	CANOGA PARK		
145	Robert	Crawford	7761 ROBERT ST	HUNTINGTON PARK		rcrawford@email.com
143	Pamela	Nelson	257 POLK STREET	BASSETT		pnelson@email.com
100	Cecilia	Castro	8055 WISHING WELL DR	HENDERSON		cececastro@dodgit.com
10007	Charlene	Anderson	4526 HIDDEN VALLEY ROAD	LEBANON	7172775554	charlenemanderson@spambob.com
10008	Armanda	Johnson	3735 PRETTY VIEW LANE	COTATI	7077956469	armandajjohnson@dodgit.com
10011	Eugene	Tiner	2518 ROCKFORD ROAD	BROCKTON	7748264810	eugenegtiner@dodgit.com
102	Carla	Kennedy	8802 STONEHURST DR	LAS VEGAS		

Figure 7-26: Contact List

The Contact List displays the following information:

- **Promotion Id** - ID of the Promotion.
- **Promotion Name** - Name of the Promotion.
- **Total Count** - Total number of Customers associated with the Promotion.
- A List of Customers associated with the Promotion. This List displays the following information for each Customer:
  - **Customer Id** - ID of the Customer.
  - **First Name** - Customer first name.
  - **Last Name** - Customer last name.
  - **Address** - Street address of the Customer.
  - **City** - Customer city.
  - **Phone Number** - Customer phone number.
  - **Email** - Customer email address.

Actions Menu



The Actions Menu for the Contact List has the following options:

- **REFRESH** - Refresh the screen to view any updates.

Print Contact List

To print the List of Customers associated with a Promotion, click the **PRINT** button. The printing process will then follow the rules and settings for your system and browser. See your system documentation for more information.

Edit Task Window

The Edit Task Window allows Users to view and edit Task information:

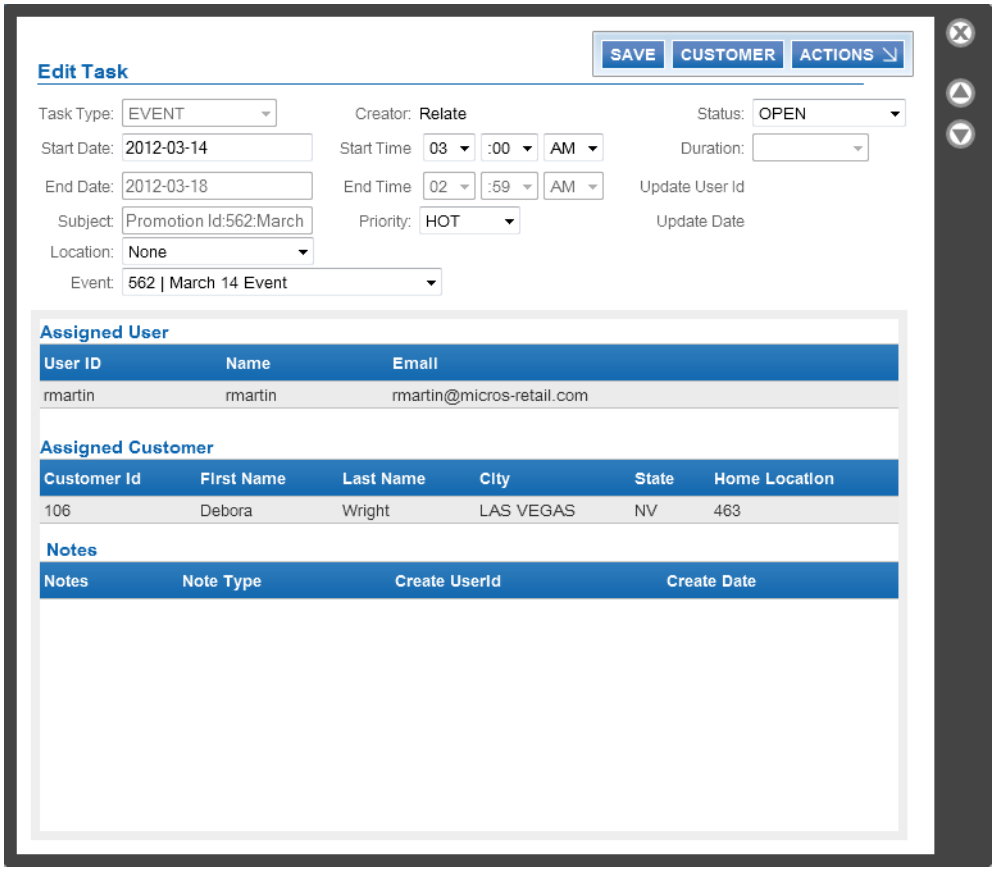


Figure 7-27: Edit Task Window

The Edit Task Window contains the following information:

- **Task Type** - Type of Task.
- **Start Date** - The date on which the Task starts.
- **End Date** - The date on which the Task ends.
- **Subject** - This subject of the Task.
- **Location** - This Selection Menu determines the Location where the Task is to be performed.
- **Event** - The Promotion associated with the Task.
- **Creator** - ID of the User who created the Task.

- **Start Time** - The time at which the Task starts
- **End Time** - The time at which the Task ends.
- **Priority** - The priority assigned to the Task.
- **Status** - The status of the Task.
- **Duration** - The duration of the Task.
- **Update User Id** - ID of the User who most recently updated the Task.
- **Update Date** - Date on which the Task was most recently updated.
- **Assigned User** - A List containing the User assigned to the Task.

  The following information is displayed for the User:

  - **User ID** - ID of the User.
  - **Name** - Name of the User.
  - **Email** - Email of the User.
- **Assigned Customer** - A List displaying the Customer associated with the Task.

  The following information is displayed for the Customer:

  - **Customer Id** - ID of the Customer.
  - **First Name** - Customer first name.
  - **Last Name** - Customer last name.
  - **City** - Customer city.
  - **State** - Customer state.
  - **Home Location** - Home location for the Customer.
- **Notes** - A List containing Notes added to the Task.

  The following information is displayed for the Notes:

  - **Notes** - Text of the Note.
  - **Create UserId** - ID of the User who entered the Note.
  - **Create Date** - Date the Note was created.

Edit a Task

To edit a Task in the Event Manager:

1. Open a Task in the Event Manager.

   The Task opens in an Edit Task Window.
2. Make updates to the fields.

   The following fields can be updated:

   - **Location** - This Selection Menu determines the Location where the Task is to be performed.
   - **Status** - The status of the Task.

- **Duration** - The duration of the Task.



Use this field to automatically set the End Time to a time, of the selected duration, after the existing Start Time.

- **Assigned User** - A List containing the User assigned to the Task.
  - To add or change the User assigned to a Task, see "Add/Change User" on page 601.
  - To delete an assigned User, see "Remove a User" on page 602.
- **Assigned Customer** - A List displaying the Customer assigned to the Task.
  - To add or change the Customer associated with a Task, see "Add/Change Customer" on page 602.
  - To delete a Customer association, see "Remove a Customer" on page 603.
- **Notes** - A List containing Notes added to the Task.
  - To add a note to a Task, see "Add a Note" on page 603.

3. Click the **SAVE** button when you are finished.

The changes are saved and the Window closes.

CHAPTER 8

Create a Coupon Promotion

Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to **True**.

See also: The *Relate Configuration Guide* for more information.

To create a Coupon Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

   The New Promotion Wizard opens on the Promotion Type step.

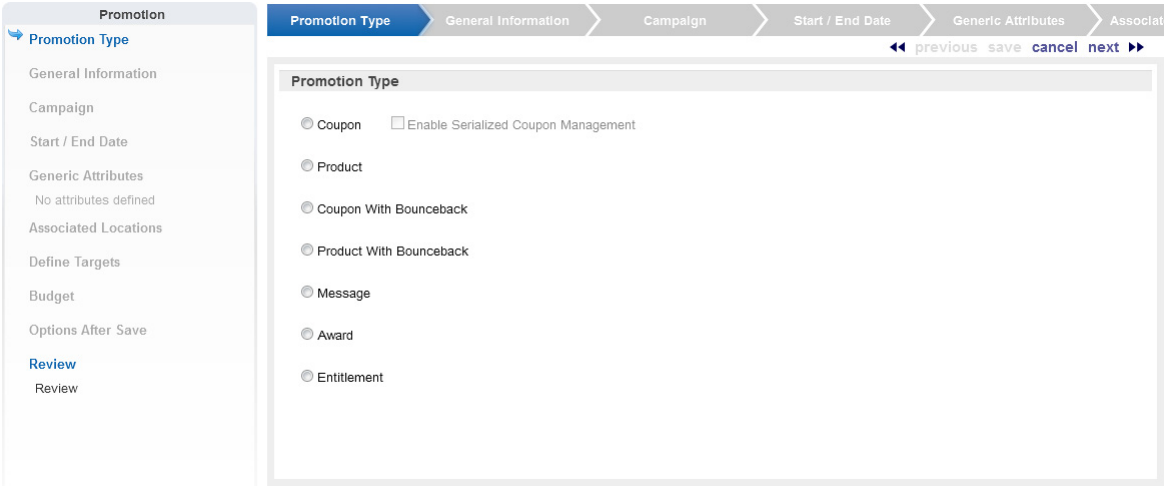


Figure 8-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Coupon**.

3. Use the **Enable Serialized Coupon Management** Check Box to indicate whether the Coupon Promotion will use Serialized Coupons. *This Check Box is only available if the Serialized Coupon Enabled Flag configuration is set to **Yes**.*

See also: The *Relate Configuration Guide* for more information about the Serialized Coupon Enabled Flag configuration.

4. Click **next**.

   The General Information step opens.

5. Configure the General Information for the Promotion:

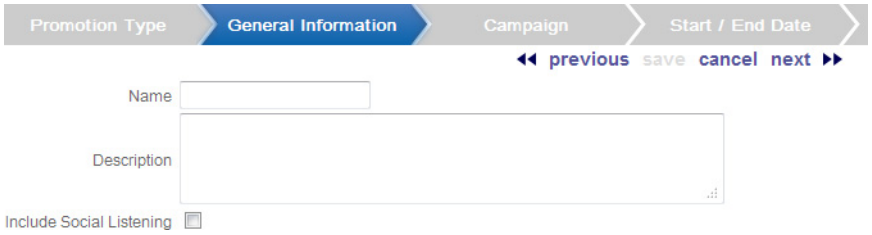


Figure 8-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.

   b. Enter a **Description** of the Promotion in the Description Text Field.

   c. Use the **Social Listening** Check Box to indicate whether social-media listening features will be enabled for the Promotion.



This Check Box is only available if social media access has been enabled in Conflate, and the User has been assigned the Relate_SystemAdmin and/or Relate_PromotionSocialListeningAdmin Role.

See also: *The* Relate Configuration Guide *for more information about Conflate, configuring social media access, and User Roles.*

6. Click **next**.

   The Campaign step opens.

7. Select how the Campaign should be associated with the Promotion:



Figure 8-3: Campaign Step

- **Auto create campaign** - Relate will automatically create a new Campaign.
- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.

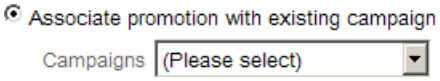


Figure 8-4: Campaigns Dropdown Menu

  Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.



Figure 8-5: Create Campaign Fields

  1) Enter the **Name** of the Campaign in the Name field.

  2) Enter a **Description** of the Campaign in the Description field.

8. Click **next**.

The Start/End Date step opens.

9. Configure the Start and End Dates for the Promotion:



Figure 8-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date Calendar Menu.

b. Select the **Start Time** for the Promotion using the Start Time Time Menus.

c. Select the **End Date** for the Promotion using the End Date Calendar Menu.

d. Select the **End Time** for the Promotion using the End Time Time Menus.

10. Click **next**.

The Generic Attributes step opens.

11. Select or enter the configuration values for each of the **Required** Attributes.

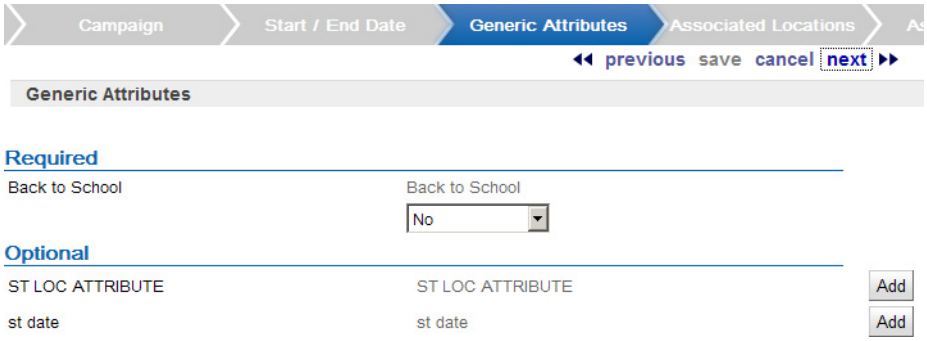


Figure 8-7: Generic Attributes Step

12. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

13. Click **next**.

The Associated Locations step opens.

14. Define the Location Eligibility Rules for the Promotion.

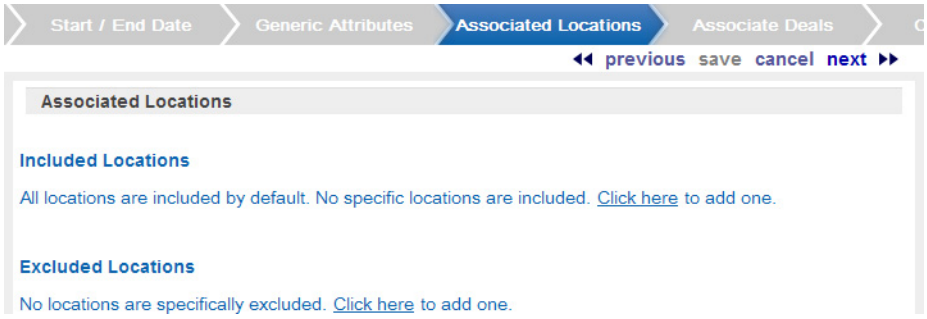


Figure 8-8: Associated Locations Step

- ❑ For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.
- ❑ For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.

15. Click **next**.

The Associate Deals step opens.

16. Add the Deal(s) for the Promotion:

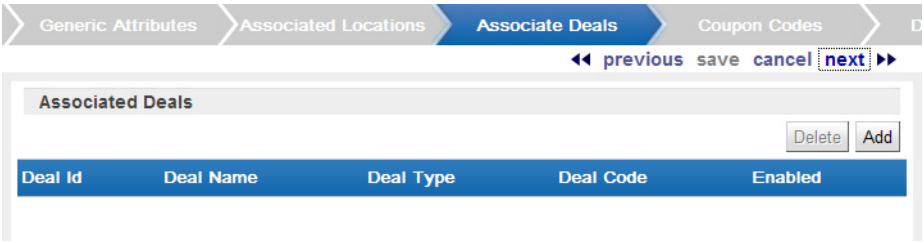


Figure 8-9: Associate Deals Step

e. Click the **Add** button.

A Deal List Window opens.

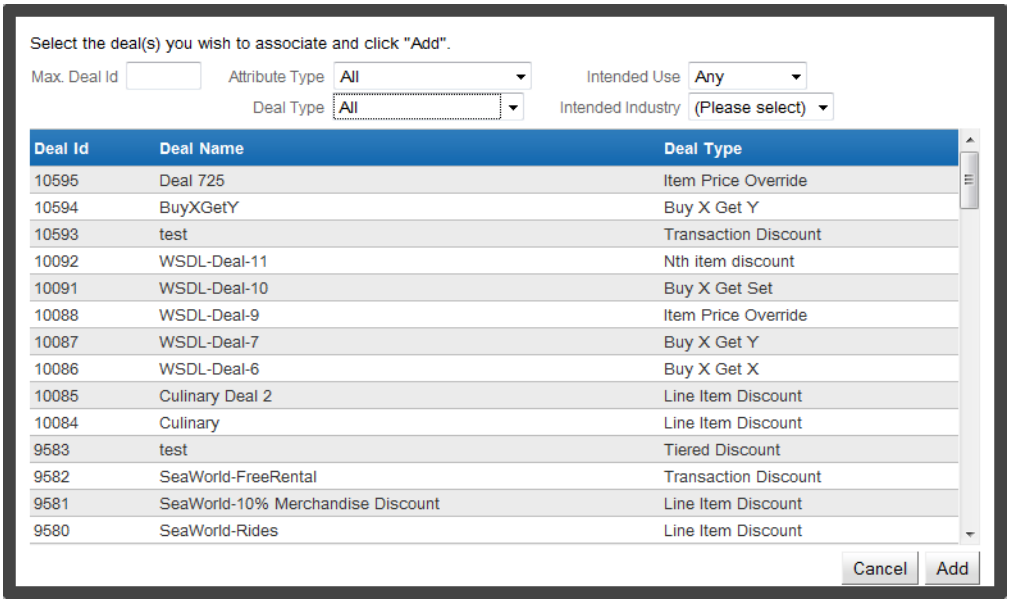


Figure 8-10: Deal List Window

f. If necessary, use the Filter fields to display a subset of Deals.

- **Max Deal Id** - This Text Field filters the List with a maximum number for the Deal ID. The List will only show Deals with an ID less than or equal to the entered value.
- **Attribute Type** - This Selection Menu filters the List by the type of Attribute assigned to the Deal. Select **All** **[DEFAULT]** to view Deals with any or no Attribute assigned.

  Upon selecting an Attribute Type, another Filter field opens that can be used to filter the List by Attribute value. *The type of field depends upon the Attribute's Data Type.*

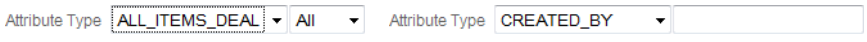


Figure 8-11: Attribute Value Fields

- **Deal Type** - This Selection Menu filters the List by Deal Type, and contains all the types of Deals that can be created in Relate. Select **All** **[DEFAULT]** to view all types of deals.
- **Intended Use** - This Selection Menu filters the List by the Intended Use of the Deal.
- **Intended Industry** - This Selection Menu filters the List by the intended industry of the Deal: either **Merchandise** or **Culinary**.

g. Click a Deal to select it. You can select multiple Deals.

h. Click the **Add** button to add the Deal(s) to the Promotion, or click the **Cancel** button to exit the Window without changing the List of Deals associated with the Promotion.



Figure 8-12: Deal Added

i. If necessary, return to step e to add another Deal to the Promotion.

17. For each Deal in the Associated Deals List that will have a Deal Code assigned to it, enter that Code in the **Deal Code** Text Field.

18. For each Deal in the Associated Deals List, use the **Enabled** Check Box to select whether the Deal will be active in the Promotion.

19. Click **next**.

The Promo-Deal Attributes step opens.

20. Configure the Promo-Deal Attributes for the Promotion event:

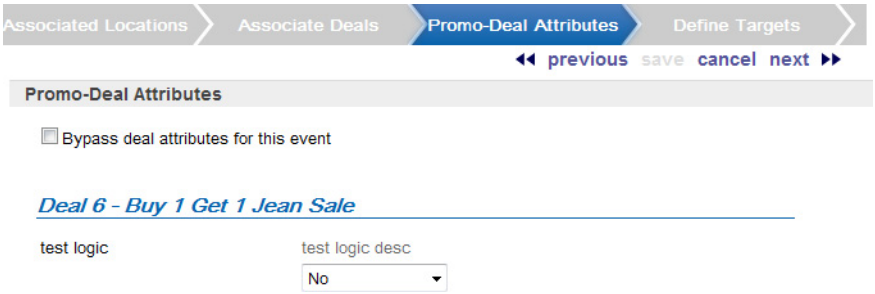


Figure 8-13: Promo-Deal Attributes Step

a. Use the **Bypass deal attributes for this event** Check Box to determine whether Promo-Deal Attributes will be used for this Promotion event:

- **Checked** (☑) - Attributes will NOT be used. The available attributes are removed from the screen. Continue with step 21.
- **Unchecked** (☐) - Attributes will be used. The available attributes are displayed. Continue with the next step.

b. Configure the Attribute(s) for the Promo-Deal(s).

21. Click **next**.

The Coupon Codes step opens.

22. For each Deal, define the Coupon Code to associate with the Deal:



Figure 8-14: Coupon Codes Step

- ❑ To specify a Coupon Code, enter it into the Coupon Code Text Field.
- ❑ If the Organization is configured for Promotion Coupon Management, click the **Get next coupon id** Link to add a sequentially-generated Coupon Code.

See also: *Relate Configuration Guide* for more information about this configuration.

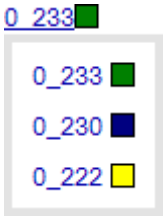
23. For each Deal, enter a **Media Description** for the Deal's Coupons.

24. If **Enable Serialized Coupon Management** was not enabled, enter the **Estimated Distribution** for each of the Coupons in the Promotion.

25. To add a new set of Coupons to the Deal, click the **Add** Link, then repeat steps 22-23 for the new Coupon.

26. To delete an unneeded set of Coupons from a Deal, click the **Delete** Link above the Coupon Code field.

27. If necessary, select the Deal Group for the Deal. To change the Deal Group:



a. Click current Deal Group name.

A menu opens with a List of Deal Groups in the Promotion.

b. Click the Deal Group to select it.

The menu closes and the new Deal Group name is displayed.

28. Click **next**.

The Define Targets step opens.

29. Define the Segment Target Eligibility Rules for the Promotion:



Figure 8-15: Define Targets Step

a. Use the Radio Buttons to select the type of Targets.

- ❍ **Untargeted** - **[DEFAULT]** The Promotion has no Segment Targets.

If you selected **Include Social Listening**, continue with step 45 on page 288.

If you did not select **Include Social Listening**, continue with step 51 on page 291.

- **Exclusive** - The Promotion is only limited to Customers within the eligible Segments. Continue with step b.
- **Non-exclusive** - The Promotion is directed toward eligible Segments, but other Customers can take advantage of it. Continue with step b.

b. The next step you perform depends upon the configuration of both your system and your User account:

- If the **Targeting Type** Radio Buttons open, continue with step c.

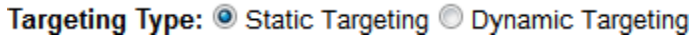


Figure 8-16: Targeting Type

- Otherwise, continue with step e.

The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `Relate_PromotionDynamicTargetAdmin` *or* `Relate_SystemAdmin` *Role.*

See also: The *Relate Configuration Guide* for more information about enabling software features and configuring Roles.

c. Select the **Targeting Type** for the Promotion.

- **Static Targeting** - Once the Target is created, the list of Customers in the Target will not change.

  Continue with step e.

- **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.

The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See "Dynamic Promotions" on page 666 for more information.

Dynamic Targeting Option Radio Buttons open.

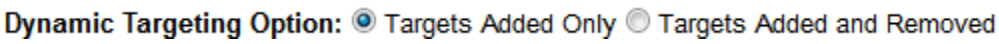


Figure 8-17: Dynamic Targeting Option

Continue with step d.

d. Select the **Dynamic Targeting Option** for the Promotion.

- **Targets Added Only** - When the Dynamic Promotions Job runs, any new Customers found that meet the Target criteria are added to the Target. All Customers currently in the Target remain in the Target.
- **Targets Added and Removed** - When the Dynamic Promotions Job runs, only the Customers who meet the Target criteria will be included in the Target. If a Customer is in the Target before the Job runs, but no longer meets the criteria, that Customer is removed from the Target.

e. Define the Segment Targets for the Promotion.

- For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.
- For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.

30. Click **next**.

- If you selected **Static Filtering** (see above), the Define Target Filtering Step opens. Continue with the next step.
- If you selected **Dynamic Targeting** (see above), the Control Groups step opens. Continue with step 36 on page 279.

31. Define the Target Filter for each Segment Target:

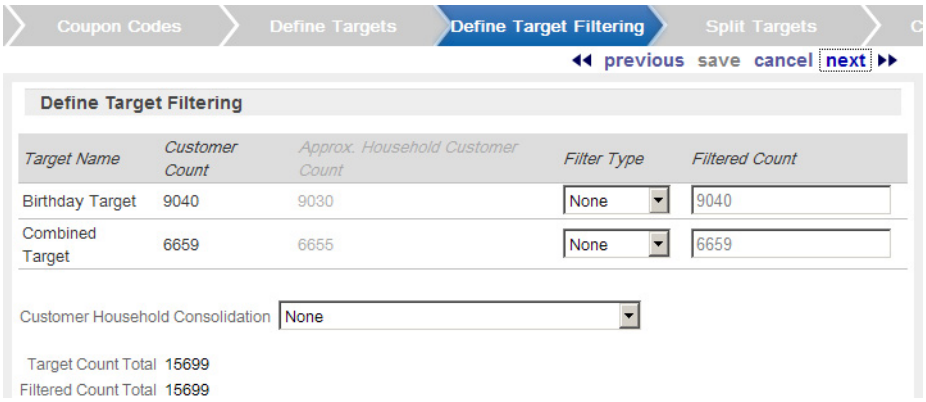


Figure 8-18: Define Target Filtering Step

a. Select the **Filter Type** for each Segment:

- **None** - **[DEFAULT]** All Customers in the Segment are eligible.
- **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Segment will be chosen randomly for eligibility.

b. If the Filter Type for the Segment is Top Sales or Random, enter the **Filter Count** of Customers eligible for the Promotion.

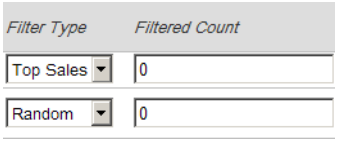


Figure 8-19: Enter Filter Count

32. Use the **Customer Household Consolidation** Selection Menu to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

This Selection Menu has the following options:

- **None** - Do not perform household filtering.
- **LT Sales** - Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** - Select head of household based on lifetime number of transactions.
- **Last Transaction Date** - Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** - Select head of household based on the Customer's numeric attributes.

33. Click **next**.

The Split Targets step opens.

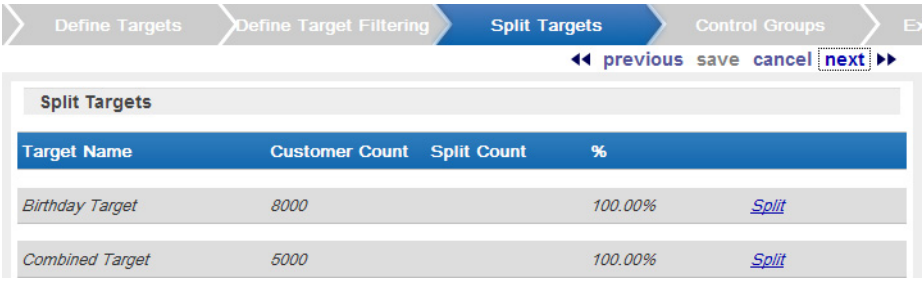


Figure 8-20: Split Targets Step

34. Filtered Targets can, optionally, be split into smaller, separate Targets. If necessary, create Splits for the filtered Targets in the Promotion:

a. Click **Split** for each Split to be created in the Target (click **Split** once for two Splits, click twice for three Splits, click three times for four Splits, etc.).

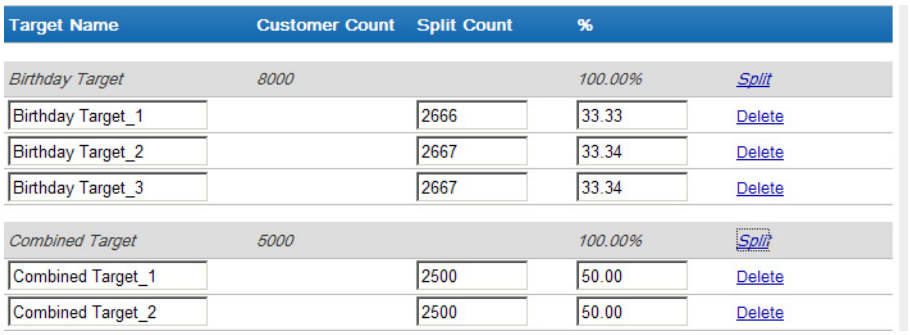


Figure 8-21: Splits

b. Optionally, change the name of the Split in the **Target Name** field for each Split.

c. Adjust the Split distribution as necessary:

- Change the number of Customers in each Split in the **Split Count** fields.
- Change the percentage of Customers in each Split in the **%** fields.

The total number of Customers in the Splits must equal the number of Customers in the target. If the numbers are not equal, Split Count will display the difference.

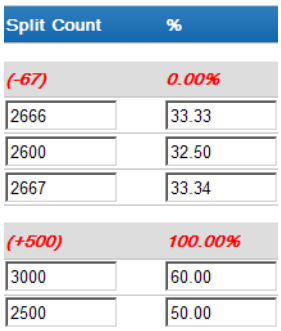


Figure 8-22: Split Counts Incorrect

d. If necessary, remove a Split by clicking the **Delete** Link for the Split.

35. Click **next**.

The Control Groups step opens.

36. Use the Radio Buttons to select the type of Control Groups:

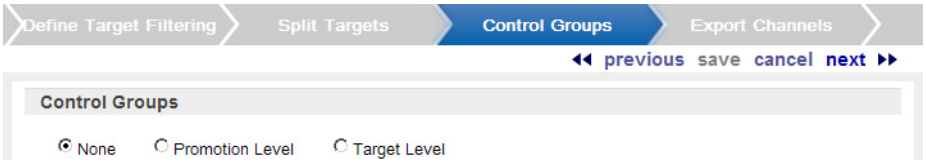


Figure 8-23: Control Groups Step

> *If* **Dynamic Targeting** *was selected for the Promotion, the Control Groups created cannot be changed. The Customers in the Control Group will remain in the Control Group throughout the Promotion.*

- **None** - **[DEFAULT]** The Promotion has no Control Group. Continue with step 37 on page 280.
- **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

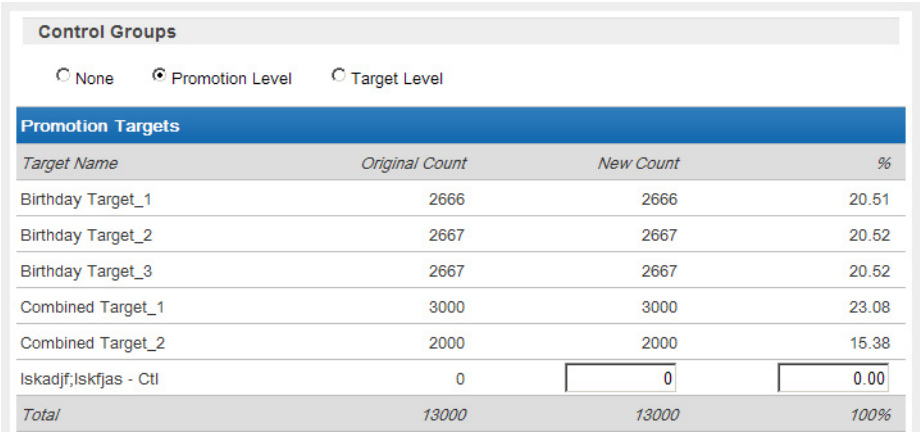


Figure 8-24: Control Group - Promotion Level

If this option is selected, determine the size of the Control Group by doing one of the following:

- In the **New Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

- **Target Level** - The Control Group Customers are pulled from each Split/Target in numbers specified individually for each Split/Target.

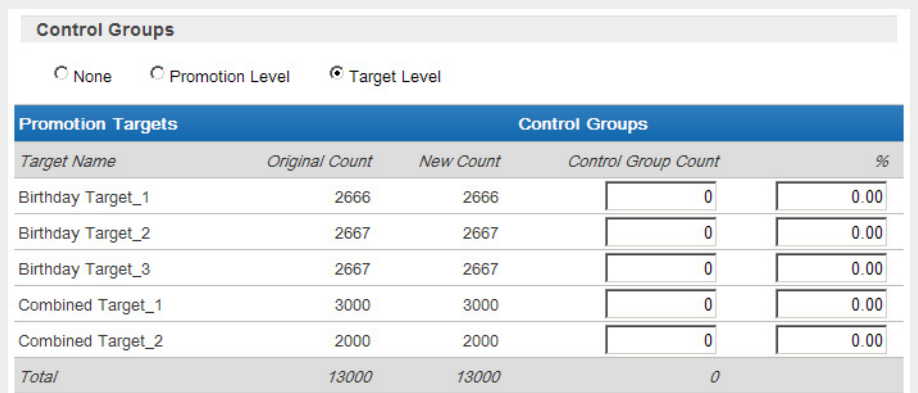


Figure 8-25: Control Group - Target Level

If this option is selected, determine the size of each Control Group by doing one of the following for each Split/Target:

- In the **Control Group Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

37. Click **next**.

The Export Channels step opens.

38. For each Split/Target, select the method used to contact the Customers in each Split/Target.

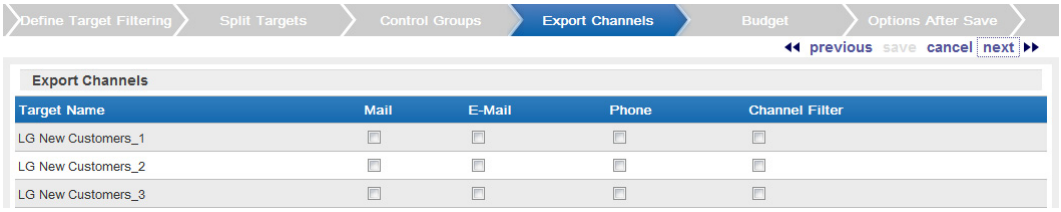


Figure 8-26: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.
- **Email** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email.
- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.
- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

If this Check Box has a checkmark (☑), Channel Filter options are displayed.

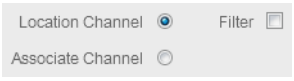


Figure 8-27: Channel Filter Options

Channel Filters have the following options:

- Radio Buttons that determine the type of Channel.

  Location Channel - Customers are contacted by the Location.

  Associate Channel - Customers are contacted by their Assigned Associates.

- **Filter** - This Check Box determines whether the export channel is filtered. If this Check Box has a checkmark (☑), additional Channel Filter options are displayed.



Figure 8-28: Filter Options

- **Max Count Per <Type>** - Determines the maximum number of target Customers that will be contacted through the channel. This field is only enabled if the **Filter** option was selected.
- **Method** - Method used to select the Customers contacted. This field is only enabled if the **Filter** option was selected. This Selection Menu has the following options:

  Random - **[DEFAULT]** Select Customers randomly.

  Top - Recent Purchase - Filter the Customers based on the most recent purchases.

  Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

  Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

- **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

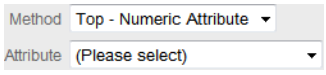


Figure 8-29: Numeric Attribute Filter

39. Click **next**.

- If the **Email** Export Channel was selected and Email Service Provider Integration is enabled in the system (see the *Relate Configuration Guide* for more information), the Email Content step opens. Continue with the next step.

- ❑ If **Include Social Listening** was selected (and the **Email** Export Channel was not), the Social Listening step opens. Continue with step 45 on page 288.
- ❑ If the **Channel Filter** Export Channel was selected (and the **Email** Export Channel and **Include Social Listening** were not), the Event Definition step opens. Continue with step 49 on page 290.
- ❑ If none of the options above were selected, the Budget step opens. Continue with step 51 on page 291.

40. Configure the Email Content.

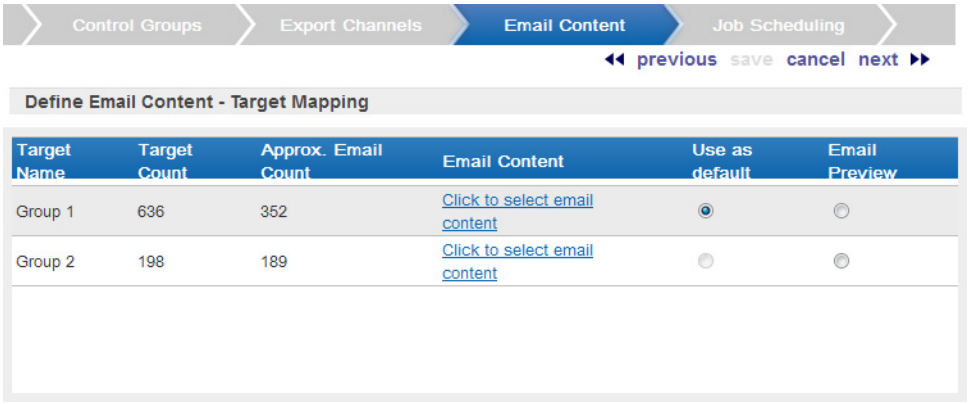


Figure 8-30: Email Content Step

a. Use the **User as Default** Radio Buttons to determine which email will be the default.

If a Customer is in more than one Group within the Promotion, that Customer will receive the email for the default Group.

b. For each Group in the Target Mapping List, click the **Click to select email content** Link to open the Email Content Template Window.



Figure 8-31: Email Content Template Window

c. Select a template in the Email Content Template Window:

1) On the left side of the Window, use the expand (⊞) buttons to find and open the proper folder for the template.

2) Click the folder where the template is located.

A List of templates opens.

Name	*Subject*	*Select*
Sample Email 1	Sample Email 1	Select template
Sample Email 2	Sample Email 2	Select template

Figure 8-32: Template List

3) Click a template to view it.

4) Click the **Select template** link to select a template and close the Email Content Template Window.

5) The template is entered in the Target Mapping List for the Group.

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	636	352	Sample Email 1	Edit	Remove	○	○
Group 2	198	189	Click to select email content			○	○

Figure 8-33: Target Mapping List - Email Template Selected

To preview an email template, use the **Email Preview** *Radio Buttons to view the templates below the Target Mapping List.*

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	1019	391	Sample Email 2	Edit	Remove	◉	◉
Group 2	1019	391	Click to select email content			○	○

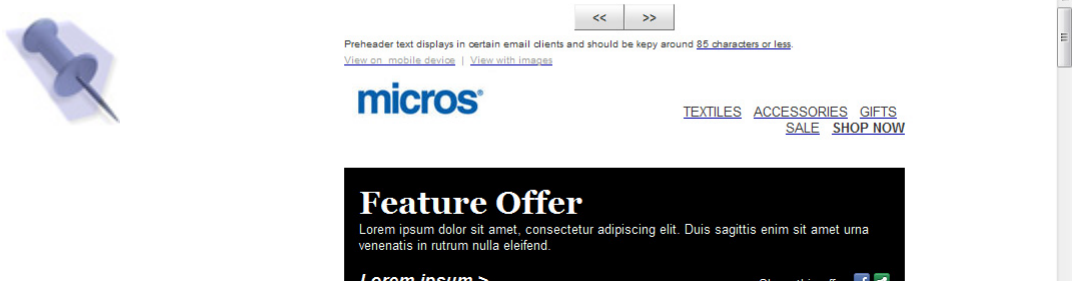


Figure 8-34: Email Preview

41. If necessary, change the email template for one or more Groups.

❑ To change the email template:

1) Click the **Edit** link.

2) Follow the procedure in step c on page 283.

❑ To remove a template, click the **Remove** link.

42. Configure the Email Delivery Job Schedule options in the Job Scheduling step.

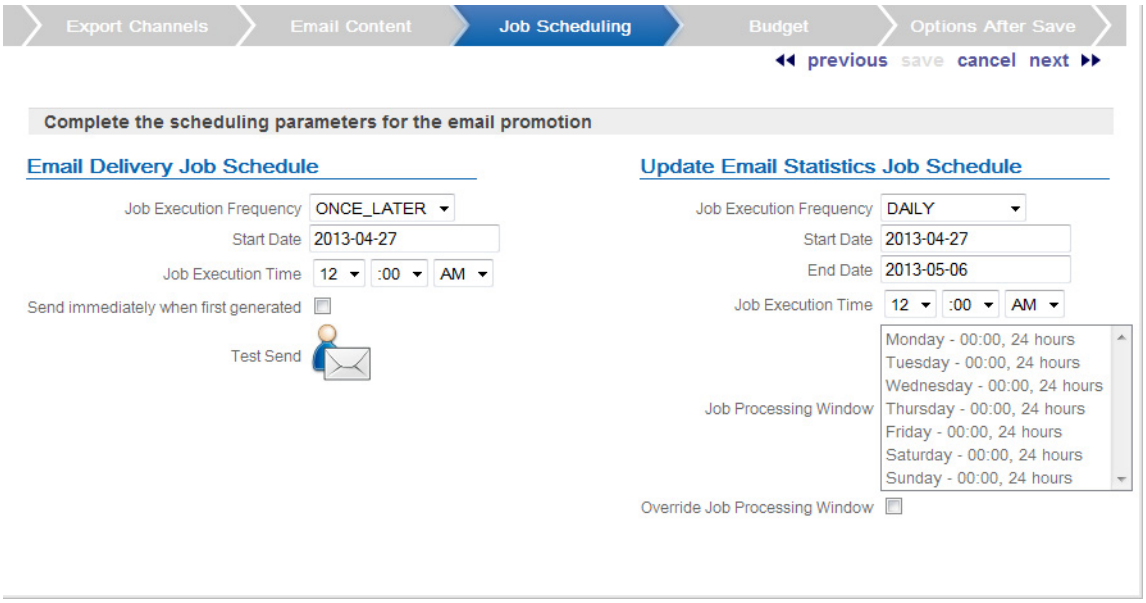


Figure 8-35: Email Delivery Step

a. Use the **Job Execution Frequency** Selection Menu to determine how often emails will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - **[DEFAULT]** Send emails for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - Send emails for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Send emails for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Send emails for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the Promotion emails will be sent:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the emails will be sent. ■ **Job Execution Time** - These Time Menus select the time at which the emails will be sent.

Query Execution Frequency	Configurations
DAILY	■ **Start Date** - This Calendar Menu selects the date on which emails will be sent. ■ **End Date** - This Calendar Menu selects the last date on which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent each day.
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Week** - This Calendar Menu determines the day of the week on which emails will be sent (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the emails will be sent.

c. Use the **Initialize when first generated** Check Box to indicate when the messages will be sent.

- **Unchecked** (☐) - **[DEFAULT]** Send messages at the indicated **Query Execution Time**.
- **Checked** (☑) - Send messages immediately upon generating the emails.

d. If necessary, do the following to send a test email message:

1) Click the **Test Send** icon ().

2) The Test Email Send Window opens.



Figure 8-36: Test Email Send Window

3) Enter each test recipient email in an **Email Addresses** Text Field (limit 3). Note that only one email address can be entered in each **Email Addresses** Text Field.

43. Configure the Update Email Statistics Job Schedule options in the Job Scheduling step.

a. Use the **Job Execution Frequency** Selection Menu to determine how often the email statistics will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - Update the statistics for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - **[DEFAULT]** Update the statistics for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Update the statistics for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Update the statistics for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the email statistics will be updated:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **Job Execution Time** - These Time Menus select the time at which the statistics will be updated.
DAILY	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last date on which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated.

Query Execution Frequency	Configurations
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Week** - This Calendar Menu determines the day of the week on which the statistics will be updated (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the statistics will be updated.

c. Use the **Override Job Processing** Check Box to determine whether the Email Statistics Job can run during a time outside the times displayed in the **Job Processing Window**.

44. Click **next**.

- ❑ If **Include Social Listening** was selected, the Social Listening step opens. Continue with step 45 on page 288.
- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with step 49 on page 290.
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with step 51 on page 291.

45. Define the keywords used by the Social Listening process:

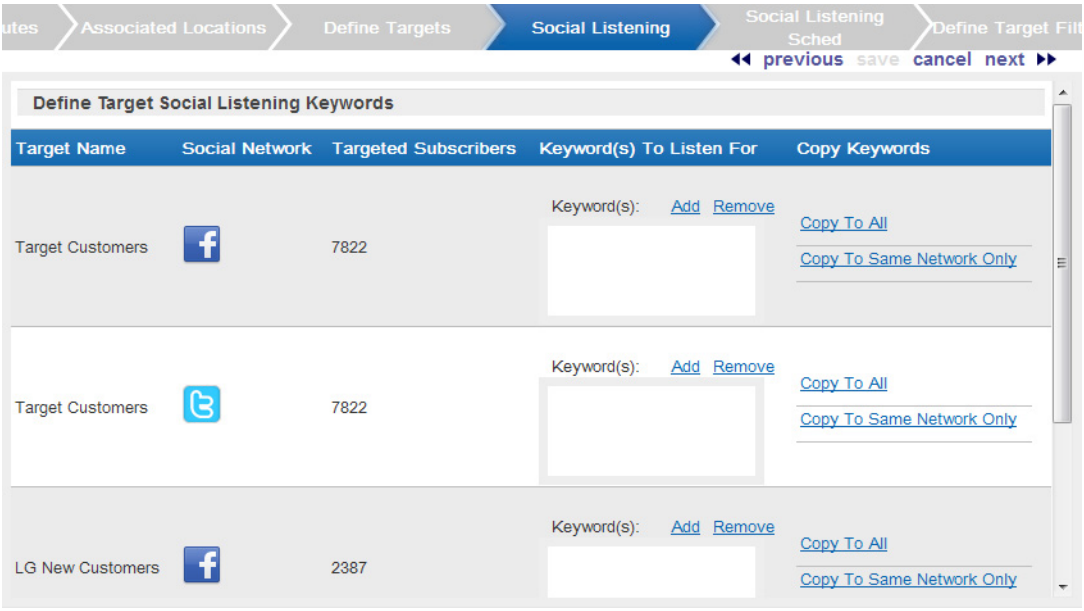


Figure 8-37: Social Listening Step

In Define Target Social Listening Keywords List, each social network configured for the system is listed once for each Target defined for the Promotion.

a. Add a keyword set to the social network for a Target:

1) Click the **Add** Link for a social network.

A Text Area Field opens.

2) Enter the keyword(s) to listen for into the Text Area Field.

3) Repeat steps 1-2 for each keyword set to enter for the social network.

b. If necessary, copy the keyword sets to other social networks:

Copying the keyword set(s) will REPLACE (rather than add to) currently configured any keyword set(s).

For example, Network 1 has the keyword set "great item" and Network 2 has the keyword sets "still shopping" and "fantastic experience at the store". The user then clicks the **Copy To All** *Link for Network 1. The only keyword set for Network 2 is now "great item".*

- Click the **Copy to Same Network Only** Link to copy the keyword set to the same social network for each Target.

  For example, if you enter "fantastic sale" in one Twitter row, clicking the **Copy to Same Network Only** Link will create a keyword set "fantastic sale" to the Twitter row for every Target.

- Click the **Copy to All** Link to copy the keyword set(s) to every social network for every Target.

c. If necessary, remove a set of keyword set from a Target's social network by clicking the Text Area Field for the keyword set, then clicking the **Remove** Link.

d. Repeat steps a-c as necessary for each Target and social network.

46. Click **next**.

The Social Listening Schedule step opens.

47. Configure the frequency at which the Job will check social media:

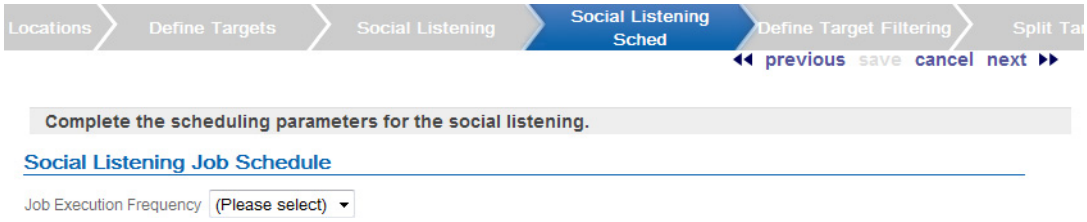


Figure 8-38: Social Listening Schedule Step

a. Select the **Job Execution Frequency** using the Selection Menu.

- **ONCE_LATER** - Run the Segment Query at a later date or time.
- **DAILY** - Run the Segment Query every day.
- **WEEKLY** - Run the Segment Query once each week.
- **MONTHLY** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **ONCE_LATER**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **DAILY**, continue with step f.
- If you selected a Job Execution Frequency of **WEEKLY**, continue with step d.
- If you selected a Job Execution Frequency of **MONTHLY**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

48. Click **next**.

- ❑ If the **Channel Filter** Export Channel was selected, the Event Definition step opens. Continue with the next step.
- ❑ If the **Channel Filter** Export Channel was not selected, the Budget step opens. Continue with step 51 on page 291.

49. Configure the Event Definition.

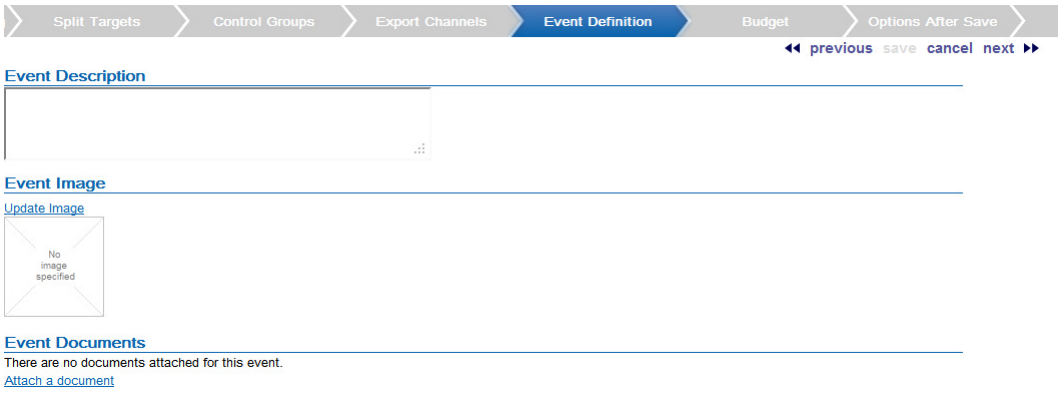


Figure 8-39: Event Definition Step

a. Enter a description of the Event in the **Event Description** field.

b. If necessary, change the image file for the Event. To change the image:

1) Click the **Update Image** Link.

The Update Image Window opens.

2) Select the **Action** using the Radio Buttons.

Select **Import Image**, to add or change the image and continue with step 3.

Select **Reset Image** to remove the image and continue with step 4.

3) Use the **File to Import** File Upload field to select the file to import.

4) Click the **Done** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

c. If necessary, attach a document to the Event. To upload a document:

1) Click the **Attach a document** Link.

The Attach a Document Window opens.

2) Use the **Please select file to Upload** File Upload field to select the file to import.

3) Click the **Upload file** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

d. To remove a document from the Event Documents List, click the **Remove** Link for the document.



Figure 8-40: Event Documents List

The document is removed from the List.

50. Click **next**.

The Budget step opens.

51. Configure the Budget for the Promotion:

a. In the Promotion Costs List, enter the costs for the Promotion that are not specific to a Target:

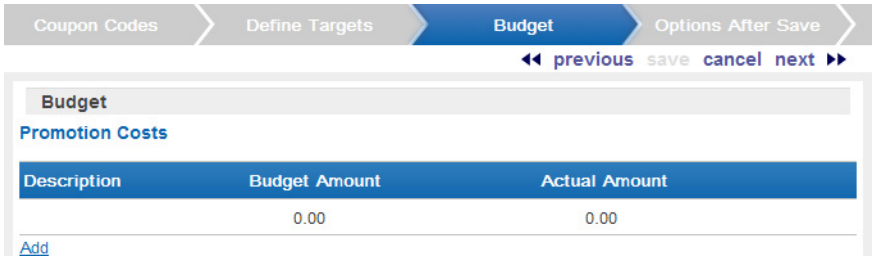


Figure 8-41: Budget Step for an Untargeted Promotion

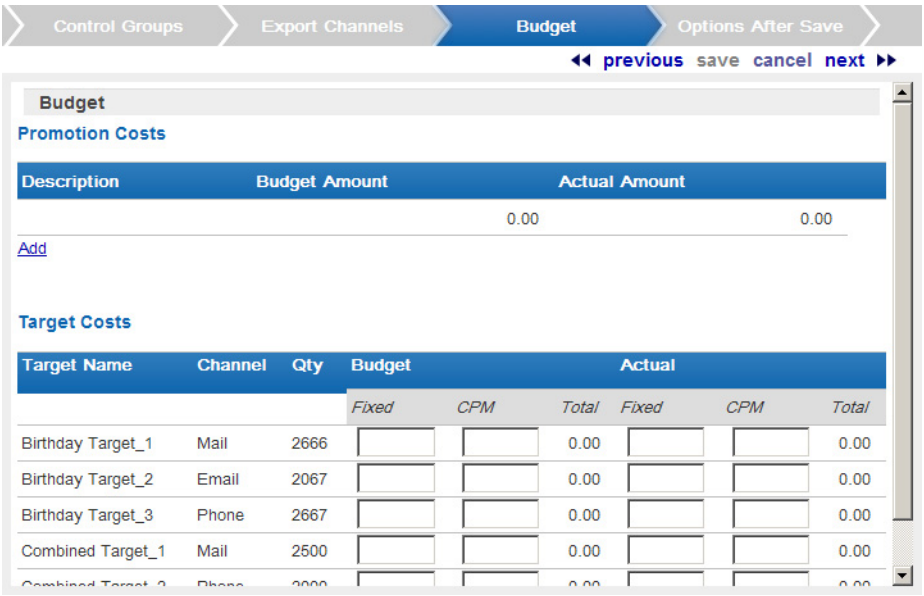


Figure 8-42: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

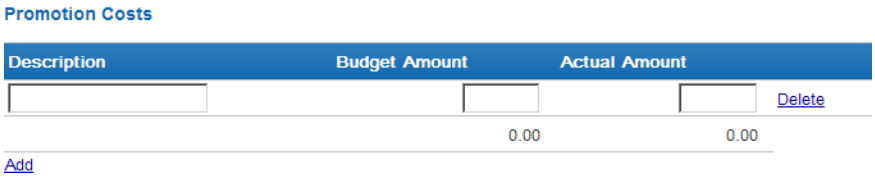


Figure 8-43: Promotion Costs

2) Enter a **Description** of the cost item.

3) Enter the budgeted amount of the item in the **Budget Amount** field.

4) Enter the actual amount of the item in the **Actual Amount** field.

5) Repeat steps 1-4 for each budget line item to add to the Promotion Costs.

6) If necessary, remove a line item by clicking its **Delete** Link.

b. If Targets are defined for the Promotion, use the Target Costs List to define the costs for each Target Channel in the Promotion:

1) In the **Budget-Fixed** field, enter the fixed cost budgeted for the Channel.

2) In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.

3) In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.

4) In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.

5) Repeat steps 1-4 for each Target Channel in the Promotion.

52. Click **next**.

The Options After Save step opens.

53. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

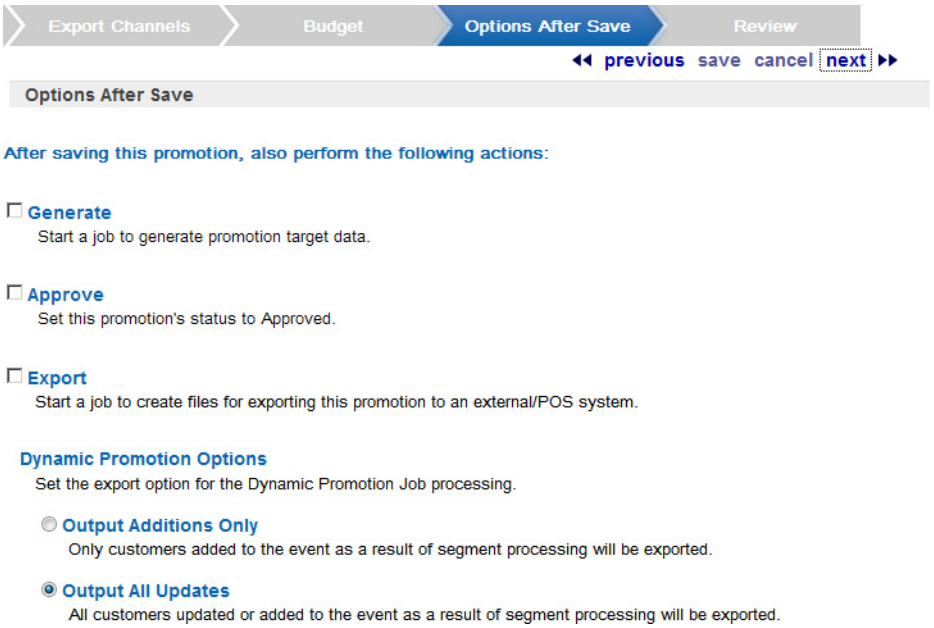


Figure 8-44: Options After Save Step

- **Generate** - Generate the Promotion Target data. This option only appears if the Promotion is targeted.
- **Approve** - Automatically approve the promotion.
- **Export** - Export the Promotion data to external systems, including POS systems.
- **Dynamic Promotion Options** - Export options for dynamic Promotions. These options only appear if the Promotion has dynamic Targets. Select the option using the Radio Buttons:
  - **Output Additions Only** - Relate will only export the Customers added to the Promotion event by the Dynamic Promotions Job.
  - **Output All Updates** - Relate will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

54. Click **next**.

The Review step opens.

55. Review the entered information to ensure that it is correct.

- Click **save** to save the Promotion with its current configuration.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to cancel the changes and return to the Promotion List without saving the Promotion.

CHAPTER 9

Create a Product Promotion



Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to **True**.

See also: The *Relate Configuration Guide* for more information.

To create a Product Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

   The New Promotion Wizard opens on the Promotion Type step.

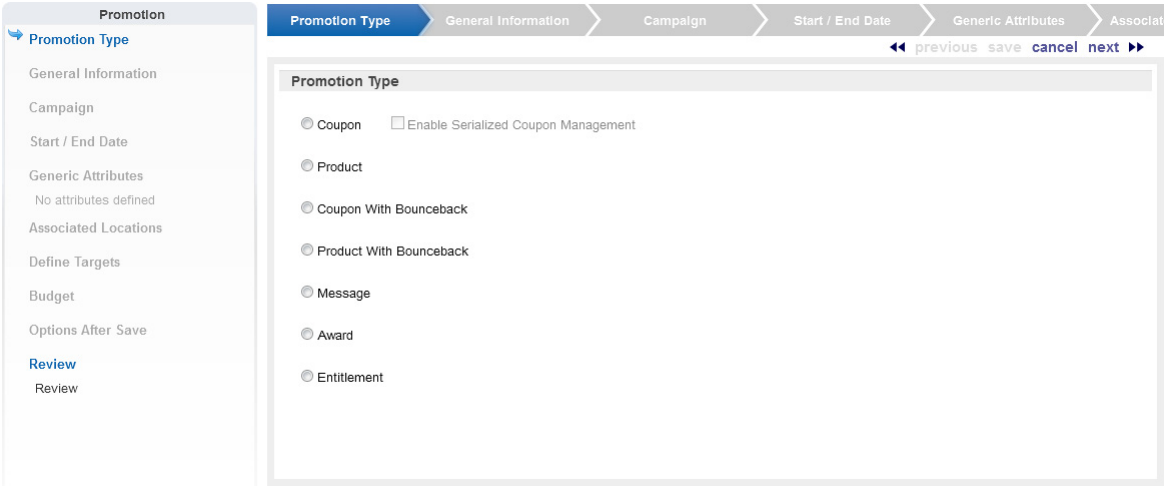


Figure 9-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Product**.
3. Click **next**.

The General Information step opens.

4. Configure the General Information for the Promotion:

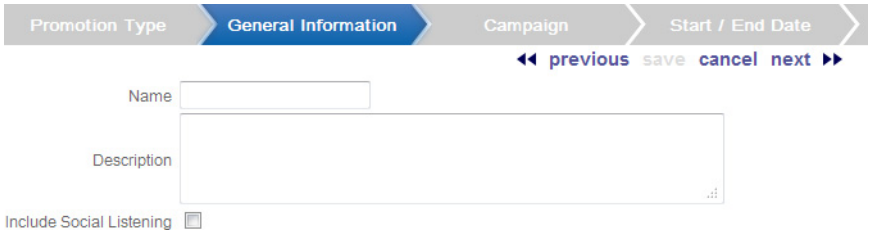


Figure 9-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.

   b. Enter a **Description** of the Promotion in the Description Text Field.

   c. Use the **Social Listening** Check Box to indicate whether social-media listening features will be enabled for the Promotion.

> *This Check Box is only available if social media access has been enabled in Conflate, and the User has been assigned the Relate_SystemAdmin and/or Relate_PromotionSocialListeningAdmin Role.*
>
> **See also:** *The* Relate Configuration Guide *for more information about Conflate, configuring social media access, and User Roles.*

5. Click **next**.

   The Campaign step opens.

6. Select how the Campaign should be associated with the Promotion:



Figure 9-3: Campaign Step

- **Auto create campaign** - Relate will automatically create a new Campaign.
- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.

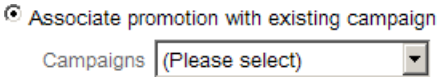


Figure 9-4: Campaigns Dropdown Menu

Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- ❑ **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.



Figure 9-5: Create Campaign Fields

1) Enter the **Name** of the Campaign in the Name field.

2) Enter a **Description** of the Campaign in the Description field.

7. Click **next**.

The Start/End Date step opens.

8. Configure the Start and End Dates for the Promotion:



Figure 9-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date Calendar Menu.

b. Select the **Start Time** for the Promotion using the Start Time Time Menus.

c. Select the **End Date** for the Promotion using the End Date Calendar Menu.

d. Select the **End Time** for the Promotion using the End Time Time Menus.

9. Click **next**.

The Generic Attributes step opens.

10. Select or enter the configuration values for each of the **Required** Attributes.

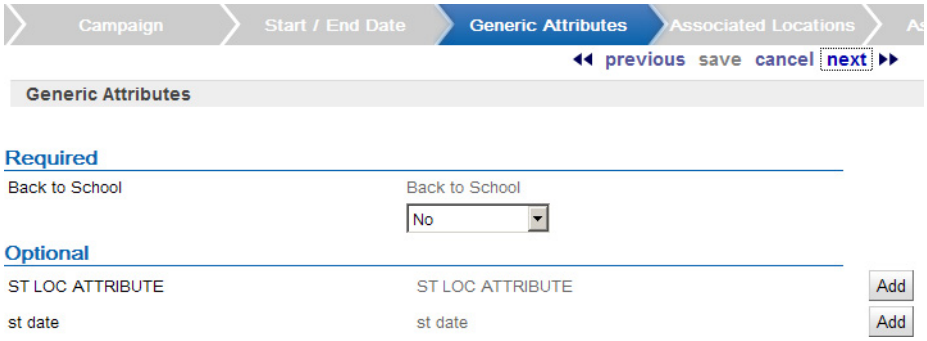


Figure 9-7: Generic Attributes Step

11. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

12. Click **next**.

The Associated Locations step opens.

13. Define the Location Eligibility Rules for the Promotion.

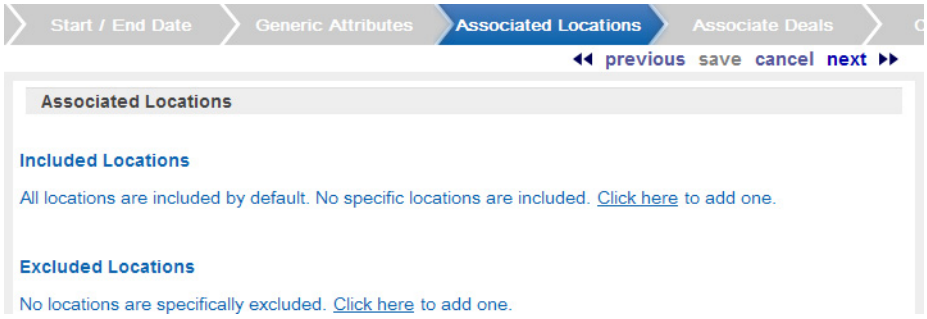


Figure 9-8: Associated Locations Step

- ❑ For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.
- ❑ For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.

14. Click **next**.

The Associate Deals step opens.

15. Add the Deal(s) for the Promotion:

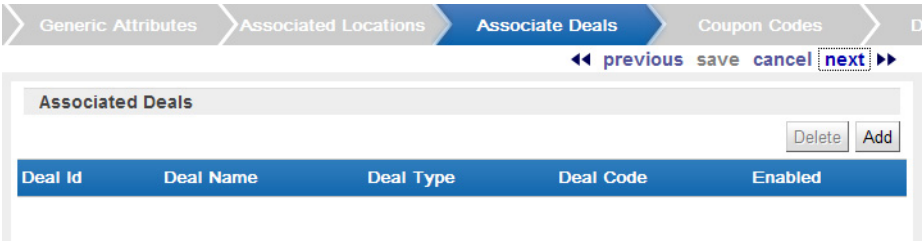


Figure 9-9: Associate Deals Step

e. Click the **Add** button.

A Deal List Window opens.

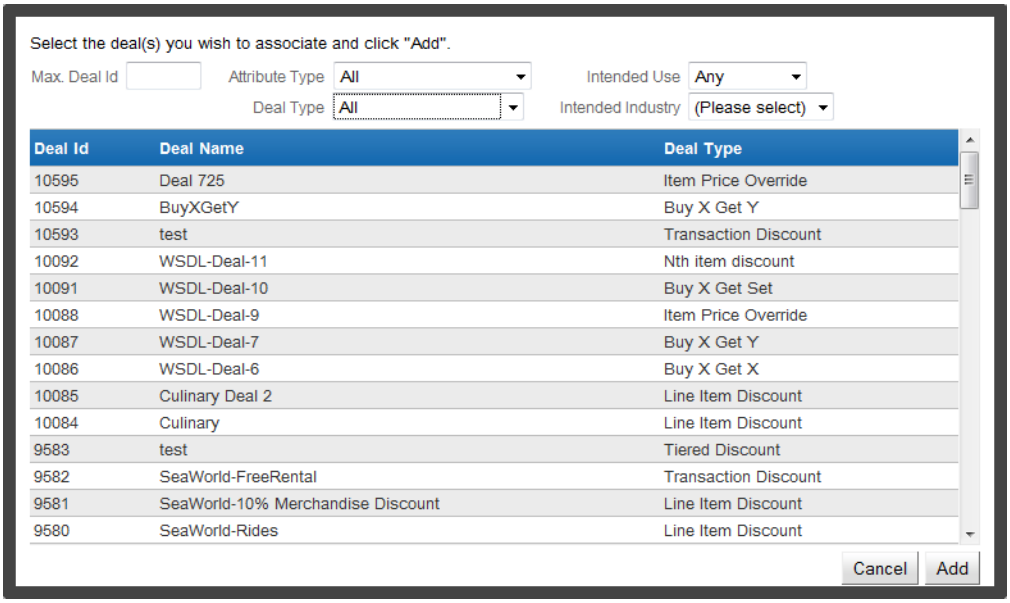


Figure 9-10: Deal List Window

f. If necessary, use the Filter fields to display a subset of Deals.

- **Max Deal Id** - This Text Field filters the List with a maximum number for the Deal ID. The List will only show Deals with an ID less than or equal to the entered value.
- **Attribute Type** - This Selection Menu filters the List by the type of Attribute assigned to the Deal. Select **All** **[DEFAULT]** to view Deals with any or no Attribute assigned.

  Upon selecting an Attribute Type, another Filter field opens that can be used to filter the List by Attribute value. *The type of field depends upon the Attribute's Data Type.*

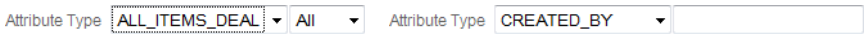


Figure 9-11: Attribute Value Fields

- **Deal Type** - This Selection Menu filters the List by Deal Type, and contains all the types of Deals that can be created in Relate. Select **All** **[DEFAULT]** to view all types of deals.
- **Intended Use** - This Selection Menu filters the List by the Intended Use of the Deal.
- **Intended Industry** - This Selection Menu filters the List by the intended industry of the Deal: either **Merchandise** or **Culinary**.

g. Click a Deal to select it. You can select multiple Deals.

h. Click the **Add** button to add the Deal(s) to the Promotion, or click the **Cancel** button to exit the Window without changing the List of Deals associated with the Promotion.



Figure 9-12: Deal Added

i. If necessary, return to step e to add another Deal to the Promotion.

16. For each Deal in the Associated Deals List that will have a Deal Code assigned to it, enter that Code in the **Deal Code** Text Field.

17. For each Deal in the Associated Deals List, use the **Enabled** Check Box to select whether the Deal will be active in the Promotion.

18. Click **next**.

The Promo-Deal Attributes step opens.

19. Configure the Promo-Deal Attributes for the Promotion event:

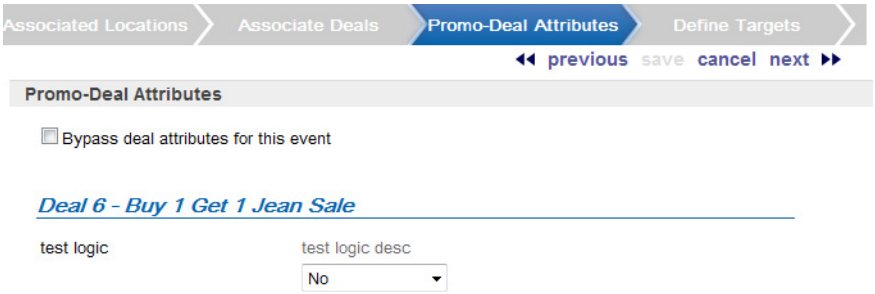


Figure 9-13: Promo-Deal Attributes Step

a. Use the **Bypass deal attributes for this event** Check Box to determine whether Promo-Deal Attributes will be used for this Promotion event:

- **Checked** (☑) - Attributes will NOT be used. The available attributes are removed from the screen. Continue with step 20.
- **Unchecked** (☐) - Attributes will be used. The available attributes are displayed. Continue with the next step.

b. Configure the Attribute(s) for the Promo-Deal(s).

20. Click **next**.

The Define Targets step opens.

21. Define the Segment Target Eligibility Rules for the Promotion:



Figure 9-14: Define Targets Step

a. Use the Radio Buttons to select the type of Targets.

- **Untargeted** - **[DEFAULT]** The Promotion has no Segment Targets.

  If you selected **Include Social Listening**, continue with step 37 on page 313.

  If you did not select **Include Social Listening**, continue with step 43 on page 316.

- **Exclusive** - The Promotion is only limited to Customers within the eligible Segments. Continue with step b.
- **Non-exclusive** - The Promotion is directed toward eligible Segments, but other Customers can take advantage of it. Continue with step b.

b. The next step you perform depends upon the configuration of both your system and your User account:

- If the **Targeting Type** Radio Buttons open, continue with step c.



Figure 9-15: Targeting Type

- Otherwise, continue with step e.



The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `Relate_PromotionDynamicTargetAdmin` *or* `Relate_SystemAdmin` *Role.*

See also: The *Relate Configuration Guide* for more information about enabling software features and configuring Roles.

c. Select the **Targeting Type** for the Promotion.

- **Static Targeting** - Once the Target is created, the list of Customers in the Target will not change.

  Continue with step e.

- **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.

> *The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See "Dynamic Promotions" on page 666 for more information.*

Dynamic Targeting Option Radio Buttons open.

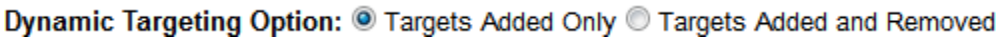


Figure 9-16: Dynamic Targeting Option

Continue with step d.

d. Select the **Dynamic Targeting Option** for the Promotion.

- **Targets Added Only** - When the Dynamic Promotions Job runs, any new Customers found that meet the Target criteria are added to the Target. All Customers currently in the Target remain in the Target.
- **Targets Added and Removed** - When the Dynamic Promotions Job runs, only the Customers who meet the Target criteria will be included in the Target. If a Customer is in the Target before the Job runs, but no longer meets the criteria, that Customer is removed from the Target.

e. Define the Segment Targets for the Promotion.

- For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.
- For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.

22. Click **next**.

- If you selected **Static Filtering** (see above), the Define Target Filtering Step opens. Continue with the next step.
- If you selected **Dynamic Targeting** (see above), the Control Groups step opens. Continue with step 28 on page 304.

23. Define the Target Filter for each Segment Target:

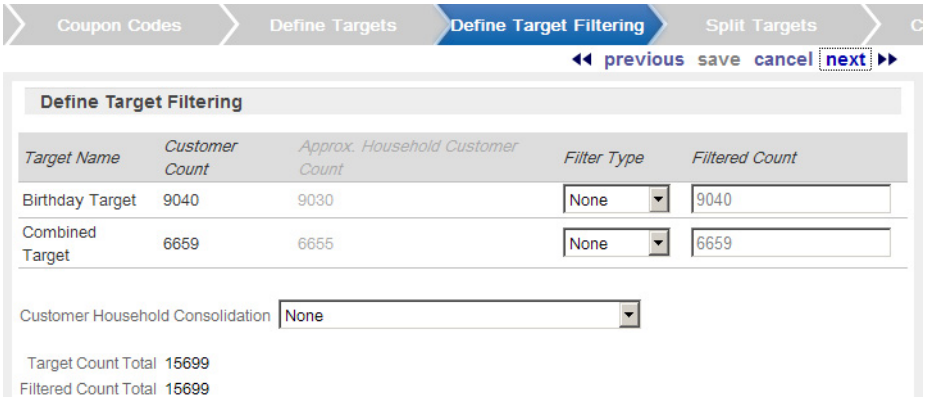


Figure 9-17: Define Target Filtering Step

a. Select the **Filter Type** for each Segment:

- **None** - **[DEFAULT]** All Customers in the Segment are eligible.
- **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Segment will be chosen randomly for eligibility.

b. If the Filter Type for the Segment is Top Sales or Random, enter the **Filter Count** of Customers eligible for the Promotion.

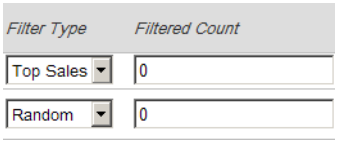


Figure 9-18: Enter Filter Count

24. Use the **Customer Household Consolidation** Selection Menu to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

This Selection Menu has the following options:

- **None** - Do not perform household filtering.
- **LT Sales** - Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** - Select head of household based on lifetime number of transactions.
- **Last Transaction Date** - Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** - Select head of household based on the Customer's numeric attributes.

25. Click **next**.

The Split Targets step opens.

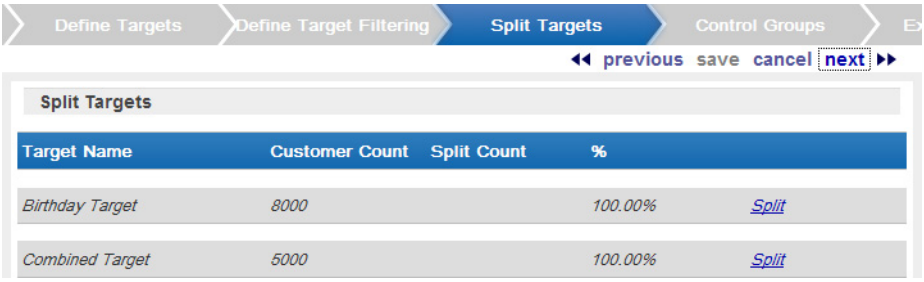


Figure 9-19: Split Targets Step

26. Filtered Targets can, optionally, be split into smaller, separate Targets. If necessary, create Splits for the filtered Targets in the Promotion:

a. Click **Split** for each Split to be created in the Target (click **Split** once for two Splits, click twice for three Splits, click three times for four Splits, etc.).

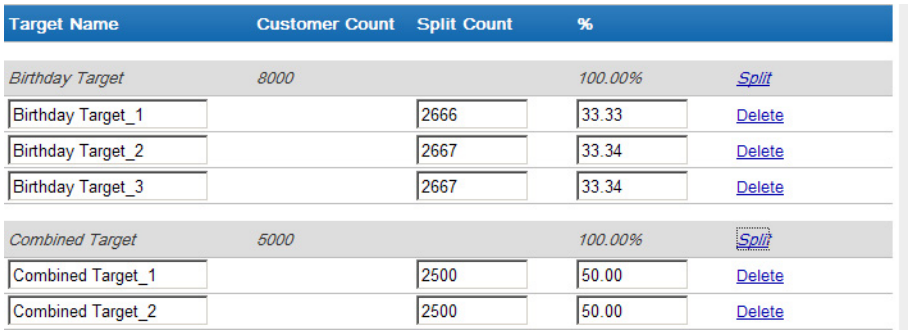


Figure 9-20: Splits

b. Optionally, change the name of the Split in the **Target Name** field for each Split.

c. Adjust the Split distribution as necessary:

- Change the number of Customers in each Split in the **Split Count** fields.
- Change the percentage of Customers in each Split in the **%** fields.

The total number of Customers in the Splits must equal the number of Customers in the target. If the numbers are not equal, Split Count will display the difference.

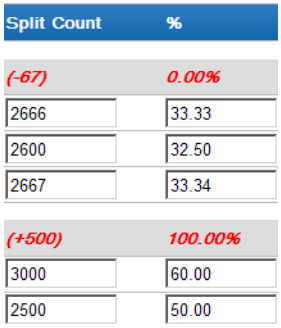


Figure 9-21: Split Counts Incorrect

d. If necessary, remove a Split by clicking the **Delete** Link for the Split.

27. Click **next**.

The Control Groups step opens.

28. Use the Radio Buttons to select the type of Control Groups:

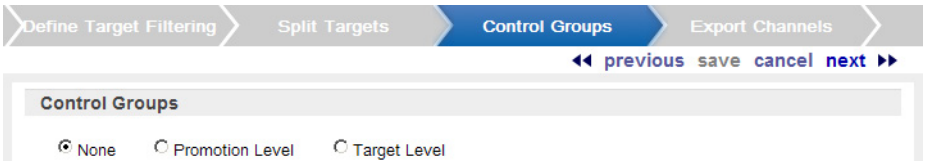


Figure 9-22: Control Groups Step

> *If* **Dynamic Targeting** *was selected for the Promotion, the Control Groups created cannot be changed. The Customers in the Control Group will remain in the Control Group throughout the Promotion.*

- **None** - **[DEFAULT]** The Promotion has no Control Group. Continue with step 29 on page 305.
- **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

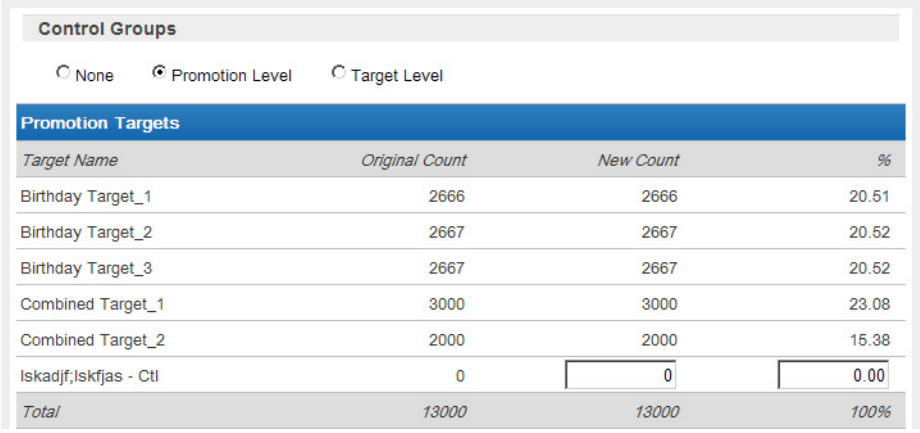


Figure 9-23: Control Group - Promotion Level

If this option is selected, determine the size of the Control Group by doing one of the following:

- In the **New Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

- **Target Level** - The Control Group Customers are pulled from each Split/Target in numbers specified individually for each Split/Target.

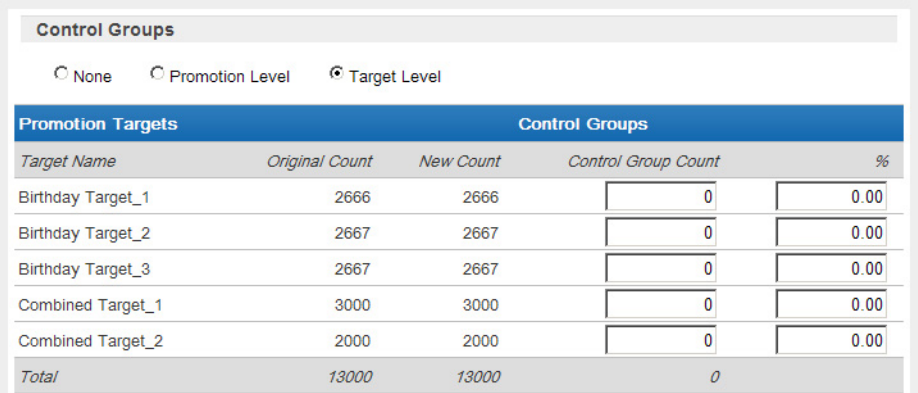


Figure 9-24: Control Group - Target Level

If this option is selected, determine the size of each Control Group by doing one of the following for each Split/Target:

- In the **Control Group Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

29. Click **next**.

The Export Channels step opens.

30. For each Split/Target, select the method used to contact the Customers in each Split/Target.

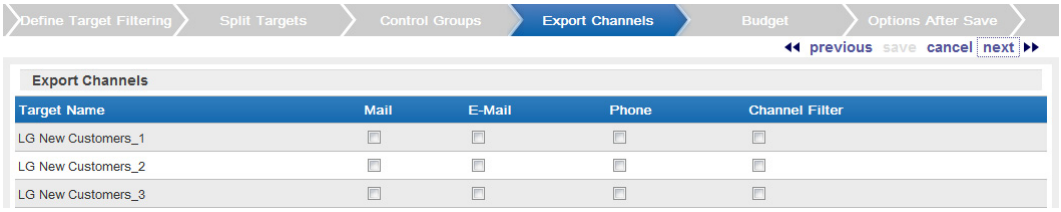


Figure 9-25: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.
- **Email** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email.
- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.
- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

If this Check Box has a checkmark (☑), Channel Filter options are displayed.

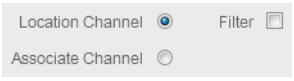


Figure 9-26: Channel Filter Options

Channel Filters have the following options:

- Radio Buttons that determine the type of Channel.

  Location Channel - Customers are contacted by the Location.

  Associate Channel - Customers are contacted by their Assigned Associates.

- **Filter** - This Check Box determines whether the export channel is filtered. If this Check Box has a checkmark (☑), additional Channel Filter options are displayed.



Figure 9-27: Filter Options

- **Max Count Per <Type>** - Determines the maximum number of target Customers that will be contacted through the channel. This field is only enabled if the **Filter** option was selected.
- **Method** - Method used to select the Customers contacted. This field is only enabled if the **Filter** option was selected. This Selection Menu has the following options:

  Random - **[DEFAULT]** Select Customers randomly.

  Top - Recent Purchase - Filter the Customers based on the most recent purchases.

  Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

  Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

- **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

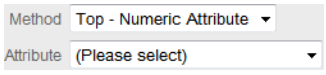


Figure 9-28: Numeric Attribute Filter

31. Click **next**.

- If the **Email** Export Channel was selected and Email Service Provider Integration is enabled in the system (see the *Relate Configuration Guide* for more information), the Email Content step opens. Continue with the next step.

- ❑ If **Include Social Listening** was selected (and the **Email** Export Channel was not), the Social Listening step opens. Continue with step 37 on page 313.
- ❑ If the **Channel Filter** Export Channel was selected (and the **Email** Export Channel and **Include Social Listening** were not), the Event Definition step opens. Continue with step 41 on page 315.
- ❑ If none of the options above were selected, the Budget step opens. Continue with step 43 on page 316.

32. Configure the Email Content.

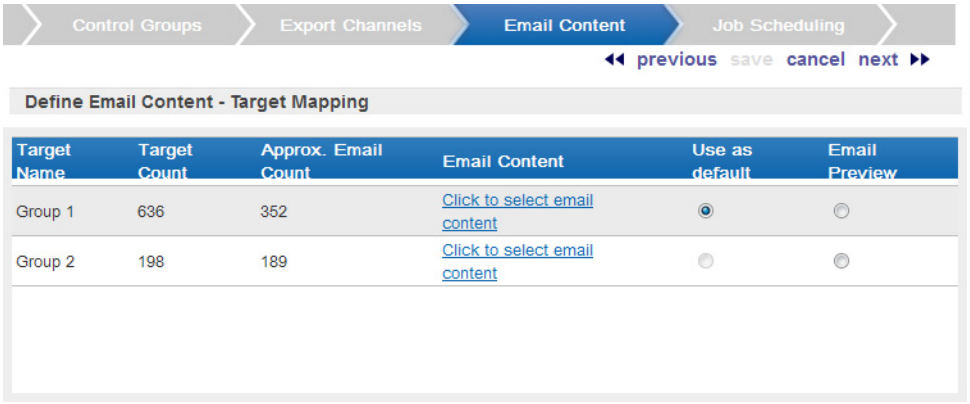


Figure 9-29: Email Content Step

a. Use the **User as Default** Radio Buttons to determine which email will be the default.

If a Customer is in more than one Group within the Promotion, that Customer will receive the email for the default Group.

b. For each Group in the Target Mapping List, click the **Click to select email content** Link to open the Email Content Template Window.



Figure 9-30: Email Content Template Window

c. Select a template in the Email Content Template Window:

1) On the left side of the Window, use the expand (⊞) buttons to find and open the proper folder for the template.

2) Click the folder where the template is located.

A List of templates opens.

Name	*Subject*	*Select*
Sample Email 1	Sample Email 1	Select template
Sample Email 2	Sample Email 2	Select template

Figure 9-31: Template List

3) Click a template to view it.

4) Click the **Select template** link to select a template and close the Email Content Template Window.

5) The template is entered in the Target Mapping List for the Group.

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	636	352	Sample Email 1	Edit	Remove	○	○
Group 2	198	189	Click to select email content			○	○

Figure 9-32: Target Mapping List - Email Template Selected

To preview an email template, use the **Email Preview** *Radio Buttons to view the templates below the Target Mapping List.*

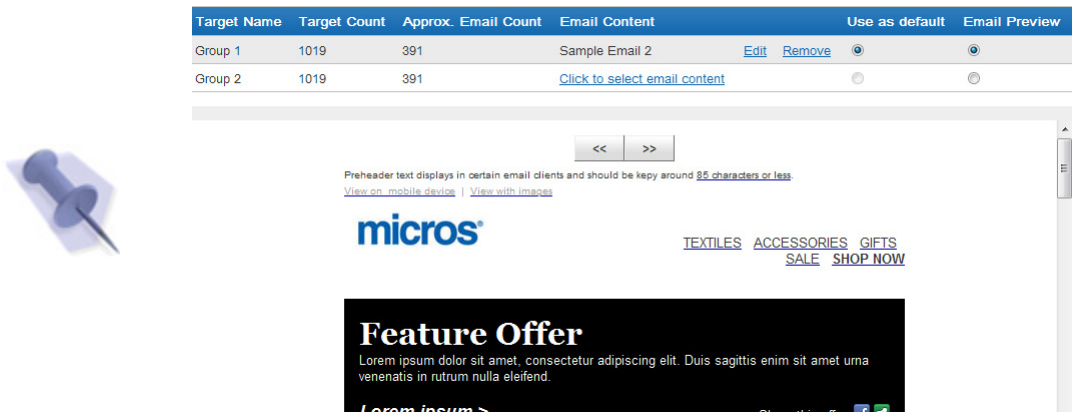


Figure 9-33: Email Preview

33. If necessary, change the email template for one or more Groups.

❑ To change the email template:

1) Click the **Edit** link.
2) Follow the procedure in step c on page 308.

- To remove a template, click the **Remove** link.

34. Configure the Email Delivery Job Schedule options in the Job Scheduling step.

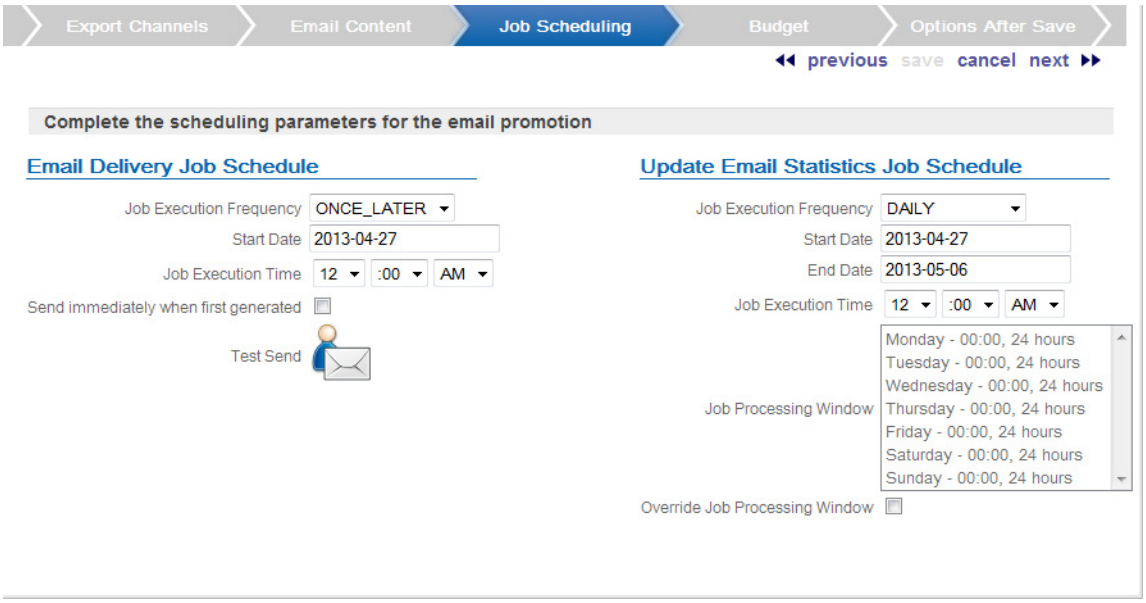


Figure 9-34: Email Delivery Step

a. Use the **Job Execution Frequency** Selection Menu to determine how often emails will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - **[DEFAULT]** Send emails for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - Send emails for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Send emails for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Send emails for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the Promotion emails will be sent:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the emails will be sent. ■ **Job Execution Time** - These Time Menus select the time at which the emails will be sent.

Query Execution Frequency	Configurations
DAILY	■ **Start Date** - This Calendar Menu selects the date on which emails will be sent. ■ **End Date** - This Calendar Menu selects the last date on which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent each day.
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Week** - This Calendar Menu determines the day of the week on which emails will be sent (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the emails will be sent.

c. Use the **Initialize when first generated** Check Box to indicate when the messages will be sent.

- **Unchecked** (☐) - **[DEFAULT]** Send messages at the indicated **Query Execution Time**.
- **Checked** (☑) - Send messages immediately upon generating the emails.

d. If necessary, do the following to send a test email message:

1) Click the **Test Send** icon ().

2) The Test Email Send Window opens.



Figure 9-35: Test Email Send Window

3) Enter each test recipient email in an **Email Addresses** Text Field (limit 3). Note that only one email address can be entered in each **Email Addresses** Text Field.

35. Configure the Update Email Statistics Job Schedule options in the Job Scheduling step.

a. Use the **Job Execution Frequency** Selection Menu to determine how often the email statistics will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - Update the statistics for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - **[DEFAULT]** Update the statistics for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Update the statistics for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Update the statistics for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the email statistics will be updated:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **Job Execution Time** - These Time Menus select the time at which the statistics will be updated.
DAILY	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last date on which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated.

Query Execution Frequency	Configurations
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Week** - This Calendar Menu determines the day of the week on which the statistics will be updated (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the statistics will be updated.

c. Use the **Override Job Processing** Check Box to determine whether the Email Statistics Job can run during a time outside the times displayed in the **Job Processing Window**.

36. Click **next**.

- ❑ If **Include Social Listening** was selected, the Social Listening step opens. Continue with step 37 on page 313.
- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with step 41 on page 315.
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with step 43 on page 316.

37. Define the keywords used by the Social Listening process:

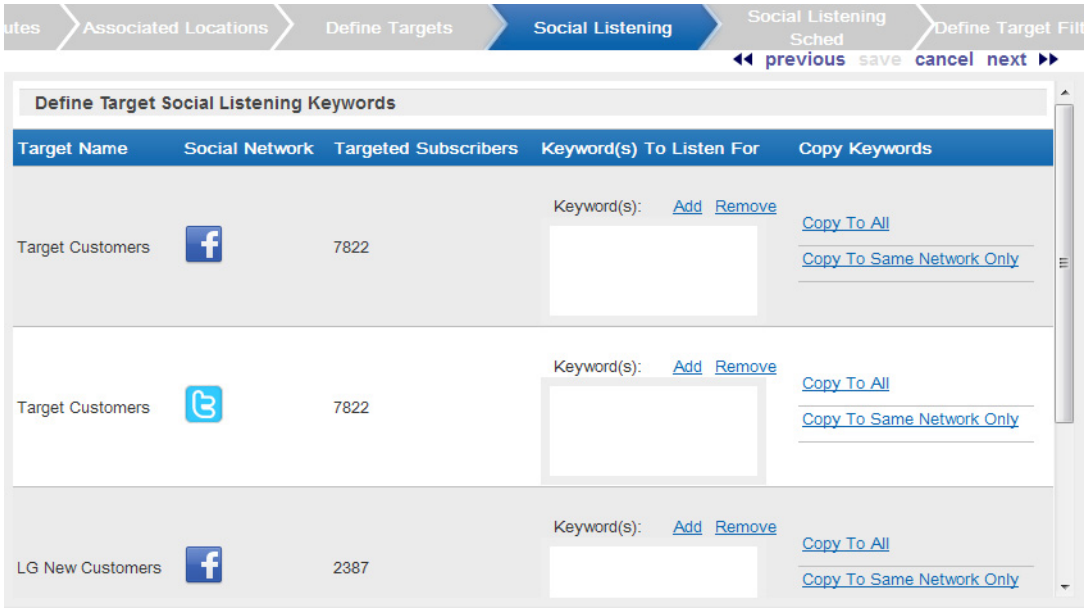


Figure 9-36: Social Listening Step

In Define Target Social Listening Keywords List, each social network configured for the system is listed once for each Target defined for the Promotion.

a. Add a keyword set to the social network for a Target:

1) Click the **Add** Link for a social network.

A Text Area Field opens.

2) Enter the keyword(s) to listen for into the Text Area Field.

3) Repeat steps 1-2 for each keyword set to enter for the social network.

b. If necessary, copy the keyword sets to other social networks:

Copying the keyword set(s) will REPLACE (rather than add to) currently configured any keyword set(s).

For example, Network 1 has the keyword set "great item" and Network 2 has the keyword sets "still shopping" and "fantastic experience at the store". The user then clicks the **Copy To All** *Link for Network 1. The only keyword set for Network 2 is now "great item".*

- Click the **Copy to Same Network Only** Link to copy the keyword set to the same social network for each Target.

  For example, if you enter "fantastic sale" in one Twitter row, clicking the **Copy to Same Network Only** Link will create a keyword set "fantastic sale" to the Twitter row for every Target.

- Click the **Copy to All** Link to copy the keyword set(s) to every social network for every Target.

c. If necessary, remove a set of keyword set from a Target's social network by clicking the Text Area Field for the keyword set, then clicking the **Remove** Link.

d. Repeat steps a-c as necessary for each Target and social network.

38. Click **next**.

The Social Listening Schedule step opens.

39. Configure the frequency at which the Job will check social media:

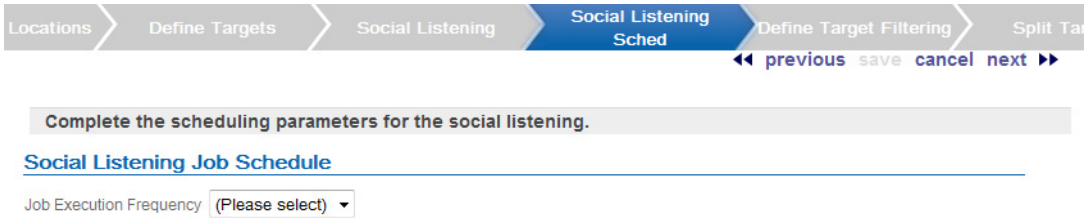


Figure 9-37: Social Listening Schedule Step

a. Select the **Job Execution Frequency** using the Selection Menu.

- **ONCE_LATER** - Run the Segment Query at a later date or time.
- **DAILY** - Run the Segment Query every day.
- **WEEKLY** - Run the Segment Query once each week.
- **MONTHLY** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **ONCE_LATER**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **DAILY**, continue with step f.
- If you selected a Job Execution Frequency of **WEEKLY**, continue with step d.
- If you selected a Job Execution Frequency of **MONTHLY**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

40. Click **next**.

- ❑ If the **Channel Filter** Export Channel was selected, the Event Definition step opens. Continue with the next step.
- ❑ If the **Channel Filter** Export Channel was not selected, the Budget step opens. Continue with step 43 on page 316.

41. Configure the Event Definition.

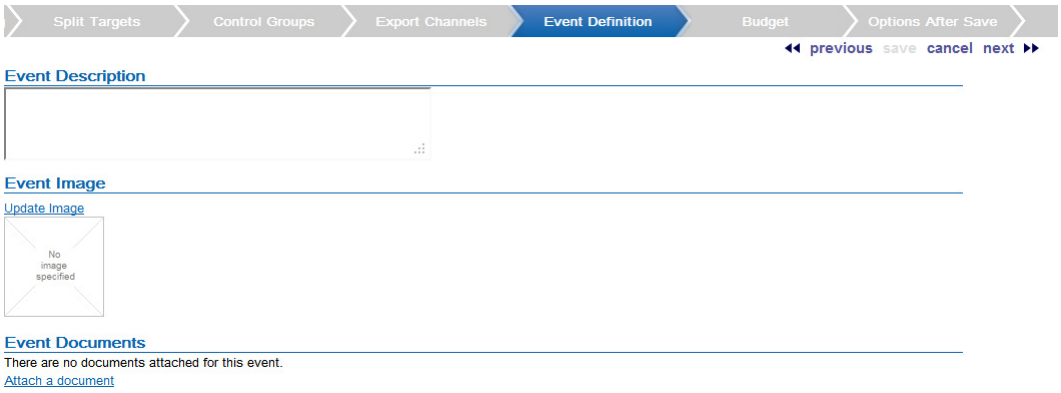


Figure 9-38: Event Definition Step

a. Enter a description of the Event in the **Event Description** field.

b. If necessary, change the image file for the Event. To change the image:

1) Click the **Update Image** Link.

The Update Image Window opens.

2) Select the **Action** using the Radio Buttons.

Select **Import Image**, to add or change the image and continue with step 3.

Select **Reset Image** to remove the image and continue with step 4.

3) Use the **File to Import** File Upload field to select the file to import.

4) Click the **Done** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

c. If necessary, attach a document to the Event. To upload a document:

1) Click the **Attach a document** Link.

The Attach a Document Window opens.

2) Use the **Please select file to Upload** File Upload field to select the file to import.

3) Click the **Upload file** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

d. To remove a document from the Event Documents List, click the **Remove** Link for the document.



Figure 9-39: Event Documents List

The document is removed from the List.

42. Click **next**.

The Budget step opens.

43. Configure the Budget for the Promotion:

a. In the Promotion Costs List, enter the costs for the Promotion that are not specific to a Target:

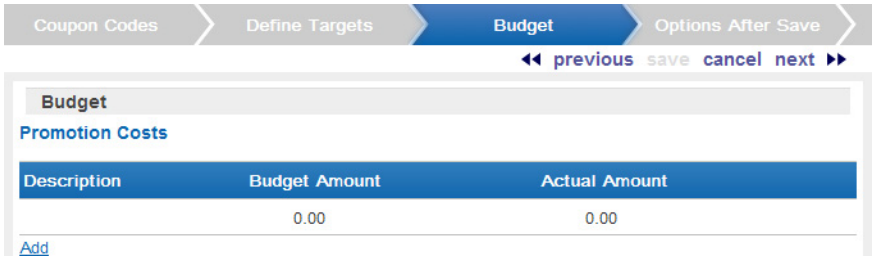


Figure 9-40: Budget Step for an Untargeted Promotion

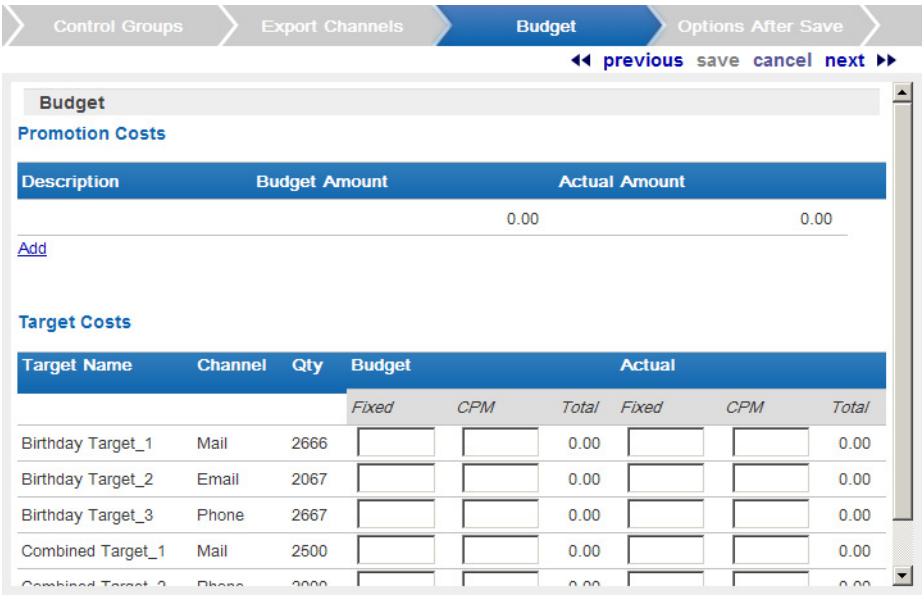


Figure 9-41: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

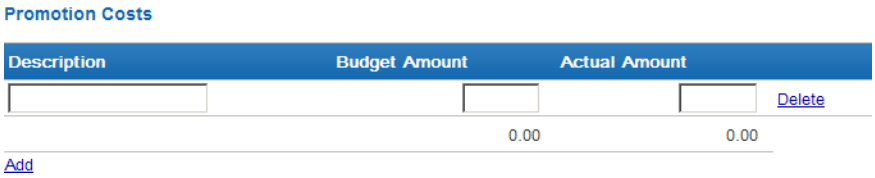


Figure 9-42: Promotion Costs

2) Enter a **Description** of the cost item.

3) Enter the budgeted amount of the item in the **Budget Amount** field.

4) Enter the actual amount of the item in the **Actual Amount** field.

5) Repeat steps 1-4 for each budget line item to add to the Promotion Costs.

6) If necessary, remove a line item by clicking its **Delete** Link.

b. If Targets are defined for the Promotion, use the Target Costs List to define the costs for each Target Channel in the Promotion:

1) In the **Budget-Fixed** field, enter the fixed cost budgeted for the Channel.

2) In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.

3) In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.

4) In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.

5) Repeat steps 1-4 for each Target Channel in the Promotion.

44. Click **next**.

The Options After Save step opens.

45. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

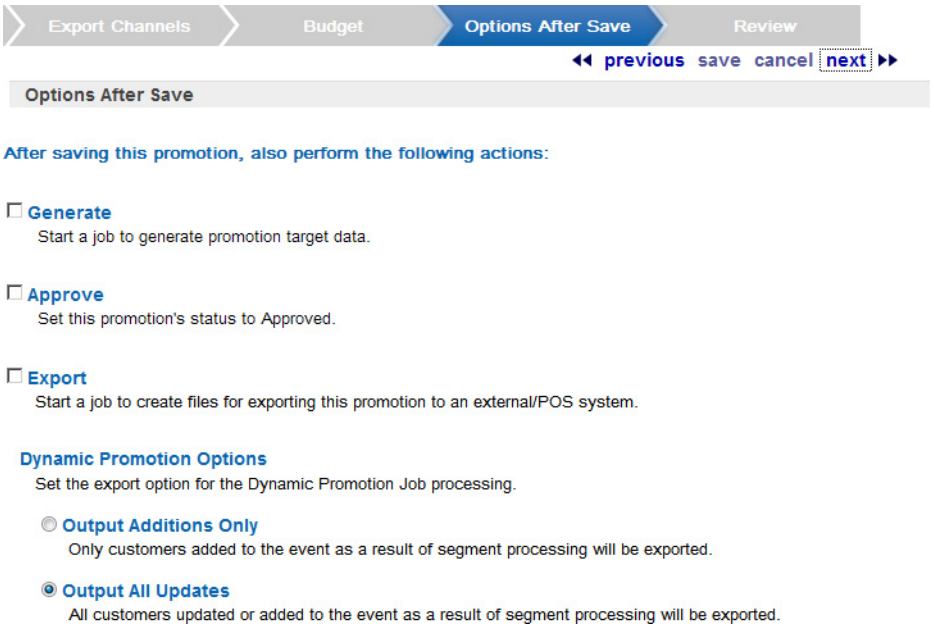


Figure 9-43: Options After Save Step

- **Generate** - Generate the Promotion Target data. This option only appears if the Promotion is targeted.
- **Approve** - Automatically approve the promotion.
- **Export** - Export the Promotion data to external systems, including POS systems.
- **Dynamic Promotion Options** - Export options for dynamic Promotions. These options only appear if the Promotion has dynamic Targets. Select the option using the Radio Buttons:
  - **Output Additions Only** - Relate will only export the Customers added to the Promotion event by the Dynamic Promotions Job.
  - **Output All Updates** - Relate will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

46. Click **next**.

The Review step opens.

47. Review the entered information to ensure that it is correct.

- Click **save** to save the Promotion with its current configuration.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to cancel the changes and return to the Promotion List without saving the Promotion.

CHAPTER 10

Create a Coupon with Bounceback Promotion



Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to **True***.*

The Coupon with Bounceback Promotion created by Relate is not available in the base implementation of Xstore. Modifications must be made to Xstore to enable Bounceback Promotions. Your account manager or implementation consultant can provide additional detail.

See also: The *Relate Configuration Guide* for more information.

To create a Coupon with Bounceback Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

The New Promotion Wizard opens on the Promotion Type step.

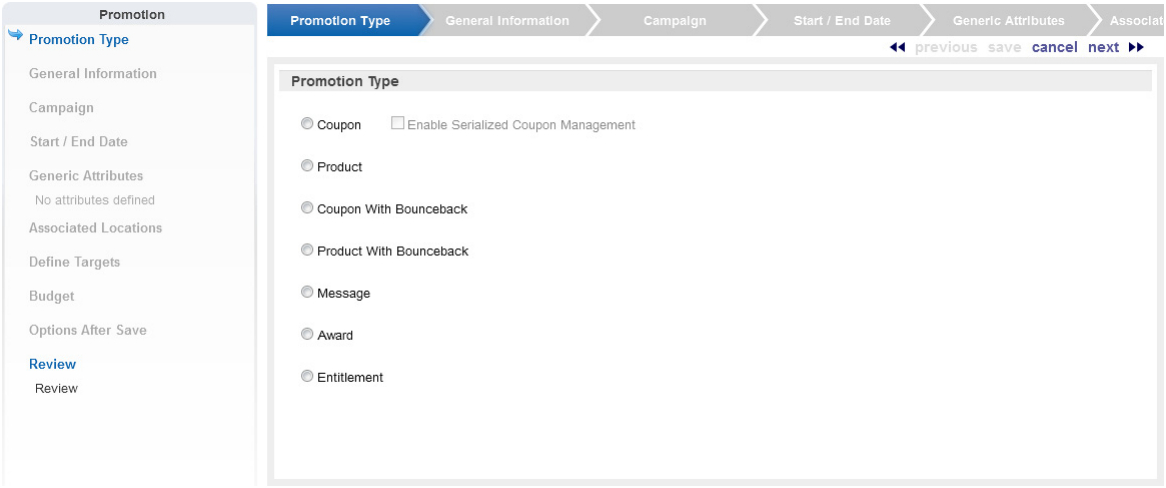


Figure 10-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Coupon with Bounceback**.
3. Click **next**.

   The General Information step opens.
4. Configure the General Information for the Promotion:

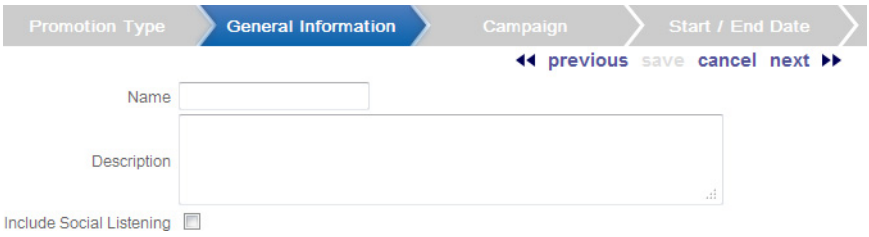


Figure 10-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.
   b. Enter a **Description** of the Promotion in the Description Text Field.
   c. Use the **Social Listening** Check Box to indicate whether social-media listening features will be enabled for the Promotion.



This Check Box is only available if social media access has been enabled in Conflate, and the User has been assigned the Relate_SystemAdmin and/or Relate_PromotionSocialListeningAdmin Role.

See also: *The* Relate Configuration Guide *for more information about Conflate, configuring social media access, and User Roles.*

5. Click **next**.

   The Campaign step opens.

6. Select how the Campaign should be associated with the Promotion:



Figure 10-3: Campaign Step

- **Auto create campaign** - Relate will automatically create a new Campaign.
- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.

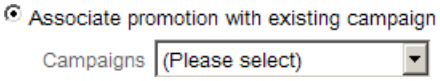


Figure 10-4: Campaigns Dropdown Menu

  Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.



Figure 10-5: Create Campaign Fields

  1) Enter the **Name** of the Campaign in the Name field.
  2) Enter a **Description** of the Campaign in the Description field.

7. Click **next**.

   The Start/End Date step opens.

8. Configure the Start and End Dates for the Promotion:

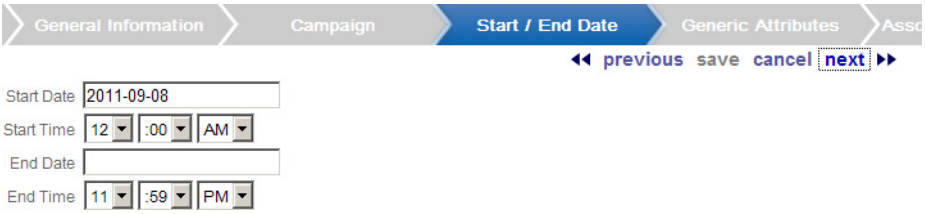


Figure 10-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date Calendar Menu.

b. Select the **Start Time** for the Promotion using the Start Time Time Menus.

c. Select the **End Date** for the Promotion using the End Date Calendar Menu.

d. Select the **End Time** for the Promotion using the End Time Time Menus.

9. Click **next**.

The Generic Attributes step opens.

10. Select or enter the configuration values for each of the **Required** Attributes.

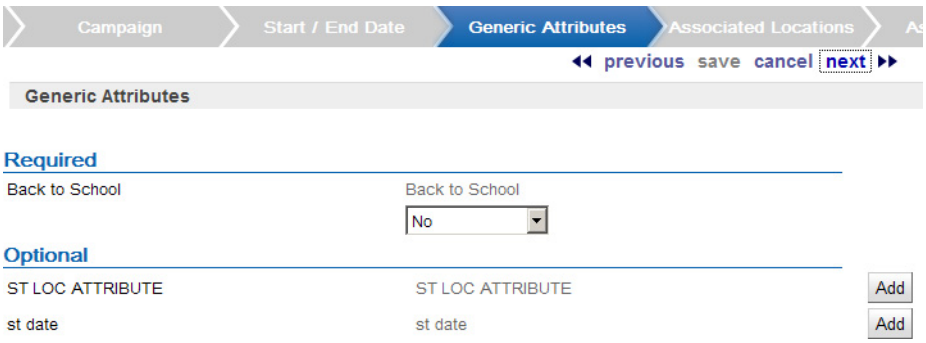


Figure 10-7: Generic Attributes Step

11. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

12. Click **next**.

The Associated Locations step opens.

13. Define the Location Eligibility Rules for the Promotion.

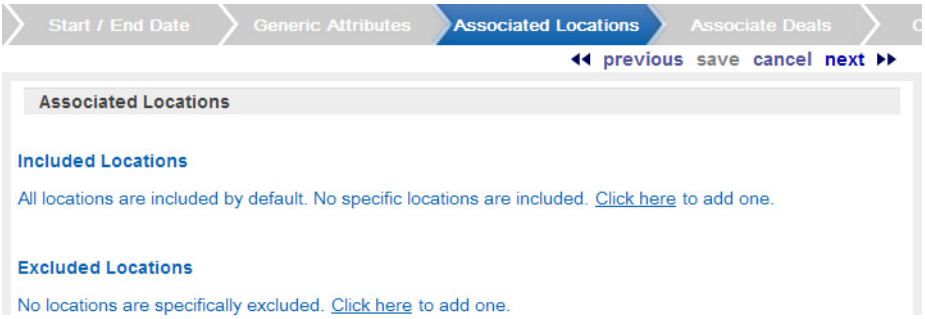


Figure 10-8: Associated Locations Step

- For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.
- For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.

14. Click **next**.

The Associate Deals step opens.

15. If necessary, create a default Bounceback Coupon.

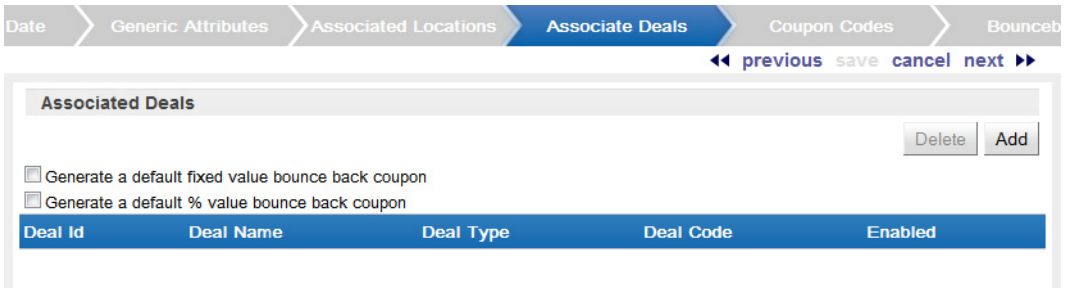


Figure 10-9: Associate Deals - Bounceback Coupon

To create a default Bounceback Coupon for the Promotion, click to place a checkmark (☑) in the proper Check Box:

- **Generate a default fixed value bounce back coupon** - Bounceback with a fixed value discount.
- **Generate a default % value bounce back coupon** - Bounceback with a percentage discount.

16. Add the Deal(s) for the Promotion:

e. Click the **Add** button.

A Deal List Window opens.

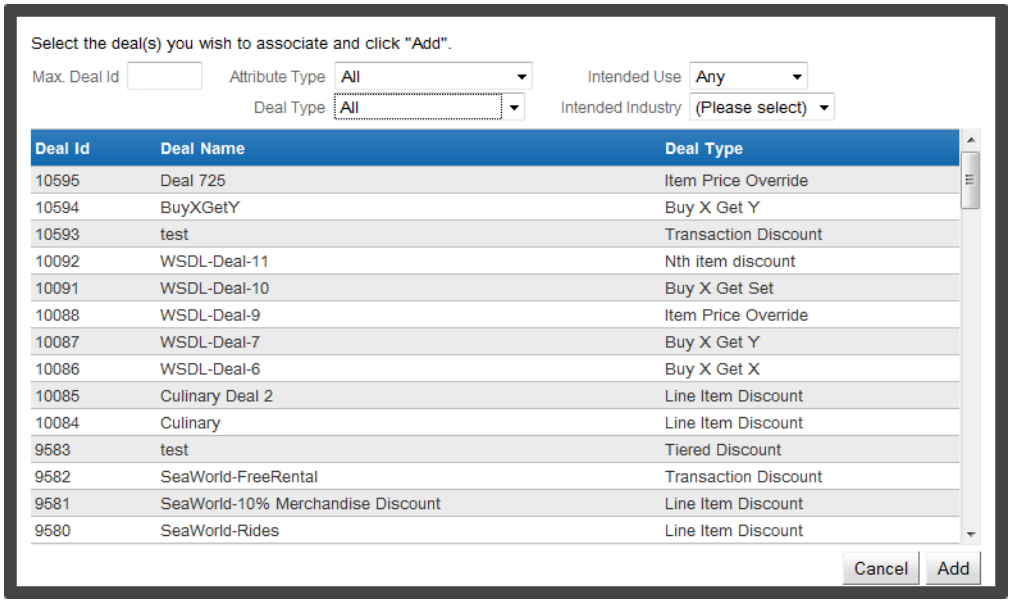


Figure 10-10: Deal List Window

f. If necessary, use the Filter fields to display a subset of Deals.

- **Max Deal Id** - This Text Field filters the List with a maximum number for the Deal ID. The List will only show Deals with an ID less than or equal to the entered value.
- **Attribute Type** - This Selection Menu filters the List by the type of Attribute assigned to the Deal. Select **All** **[DEFAULT]** to view Deals with any or no Attribute assigned.

  Upon selecting an Attribute Type, another Filter field opens that can be used to filter the List by Attribute value. *The type of field depends upon the Attribute's Data Type.*

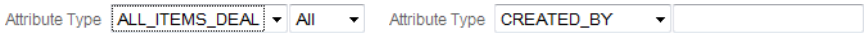


Figure 10-11: Attribute Value Fields

- **Deal Type** - This Selection Menu filters the List by Deal Type, and contains all the types of Deals that can be created in Relate. Select **All** **[DEFAULT]** to view all types of deals.
- **Intended Use** - This Selection Menu filters the List by the Intended Use of the Deal.
- **Intended Industry** - This Selection Menu filters the List by the intended industry of the Deal: either **Merchandise** or **Culinary**.

g. Click a Deal to select it. You can select multiple Deals.

h. Click the **Add** button to add the Deal(s) to the Promotion, or click the **Cancel** button to exit the Window without changing the List of Deals associated with the Promotion.



Figure 10-12: Deal Added

i. If necessary, return to step e to add another Deal to the Promotion.

> *A Bounceback Promotion must have at least two Deals added. The Deals can be selected from existing Deals, or one Deal can be selected and a default Deal can be added (step 15).*

17. For each Deal in the Associated Deals List that will have a Deal Code assigned to it, enter that Code in the **Deal Code** Text Field.

18. For each Deal in the Associated Deals List, use the **Enabled** Check Box to select whether the Deal will be active in the Promotion.

19. Click **next**.

The Promo-Deal Attributes step opens.

20. Configure the Deal Attributes for the Promotion event:

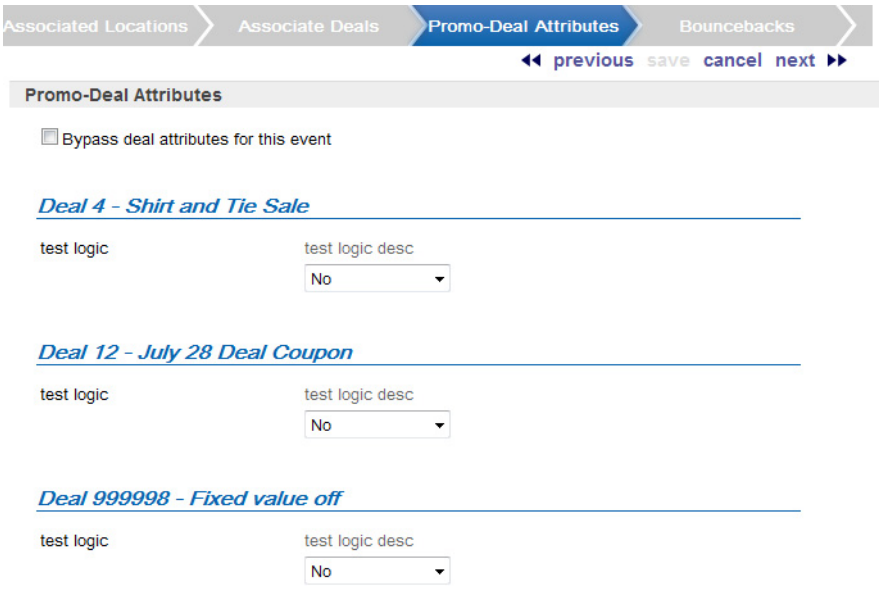


Figure 10-13: Promo-Deal Attributes Step

a. Use the **Bypass deal attributes for this event** Check Box to determine whether Deal Attributes will be used for this Promotion event:

- **Checked** (☑) - Attributes will NOT be used. The available attributes are removed from the screen. Continue with step 21.

- **Unchecked** (☐) - Attributes will be used. The available attributes are displayed. Continue with the next step.

b. Configure the Attribute(s) for the Deal(s).

21. Click **next**.

The Coupon Codes step opens.

22. For each Deal, define the Coupon Code to associate with the Deal:



Figure 10-14: Coupon Codes Step

- To specify a Coupon Code, enter it into the Coupon Code Text Field.
- If the Organization is configured for Promotion Coupon Management, click the **Get next coupon id** Link to add a sequentially-generated Coupon Code.

See also: *Relate Configuration Guide* for more information about this configuration.

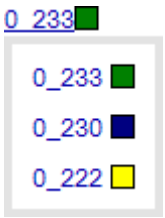
23. For each Deal, enter a **Media Description** for the Deal's Coupons.

24. Enter the **Estimated Distribution** for each of the Coupons in the Promotion.

25. To add a new set of Coupons to the Deal, click the **Add** Link, then repeat steps 22-23 for the new Coupon.

26. To delete an unneeded set of Coupons from a Deal, click the **Delete** Link above the Coupon Code field.

27. If necessary, select the Deal Group for the Deal. To change the Deal Group:



a. Click current Deal Group name.

A menu opens with a List of Deal Groups in the Promotion.

b. Click the Deal Group to select it.

The menu closes and the new Deal Group name is displayed.

28. Click **next**.

The Bouncebacks step opens.

29. Indicate which Deal(s) will be the Bounceback Deal(s).

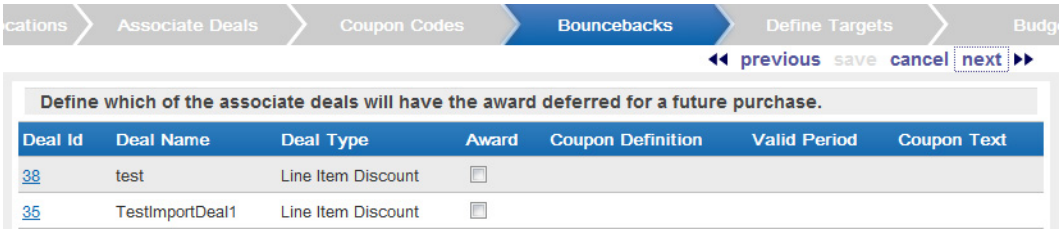


Figure 10-15: Bouncebacks Step

Only Line Item Discount and Transaction Discount Deals will be displayed. A Deal of any other type cannot be used as a Bounceback award, or as a trigger.

- Click to enter a checkmark in the **Award Deferred** Check Box for the Deal(s) that will issue the Bounceback.

The **Award Deferred** *Deal is the Deal that triggers a Bounceback. For the actual Bounceback, this Check Box is left unchecked (☐).*

The Bounceback configuration fields are displayed.

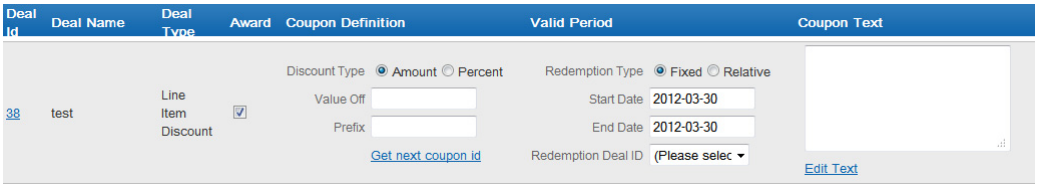


Figure 10-16: Bounceback Configuration Fields

- If the option to generate a default Bounceback Coupon was selected in step 1, the default bounceback coupon is automatically selected as the issuing Deal.

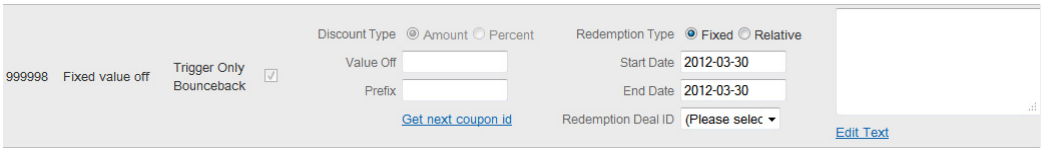


Figure 10-17: Default Bounceback Coupon

30. Enter the configuration information for the Bounceback.

- **Discount Type** - Method used to determine the Bounceback discount. This field is inactive for default Deals. These Radio Buttons have the following options:
  - **Amount** - Discount is a fixed currency amount.

- **Percent** - Discount is a percentage of an amount.

- **Value Off** - Amount of the discount. This is either an amount or a percentage off, depending on the **Discount Type** configuration.
- **Prefix** - Coupon Prefix for the Bounceback Coupon.

  If the Organization is configured for Promotion Coupon Management, click the **Get next coupon id** Link to add a sequentially-generated Coupon Code.
- **Redemption Type** - The method used to determine the valid dates for the Bounceback. These Radio Buttons have the following options:
  - **Fixed** - Bounceback can be redeemed during a specified date range. This option has the following configurations:

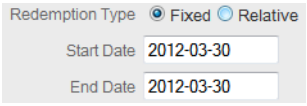


Figure 10-18: Fixed Redemption Type

Start Date - Date on which the Bounceback becomes valid.

End Date - Last date on which the Bounceback is valid.

  - **Relative** - Bounceback can be redeemed during a specified time period immediately after the Bounceback is issued. This option has the following configurations:

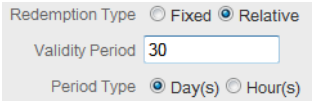


Figure 10-19: Relative Redemption Type

Validity Period - Period during which the Bounceback is valid. The type of period is determined by the Period Type configuration.

Period Type - Units of time used to determine the validity period. These Radio Buttons are used to select either **Day(s)** or **Hour(s)**.

- **Redemption Deal ID** - This Selection Menu determines the Deal whose Eligibility Rules are used for the Bounceback.



The Bounceback Coupon only uses the Eligibility Rules from the Deal selected here. No discount information from the Redemption Deal is used by the Bounceback.

- **Coupon Text** - This field contains the text that is displayed on the Bounceback Coupon. To edit this field:

  1) Click the **Edit Text** Link.

2) The Edit Text Window opens.

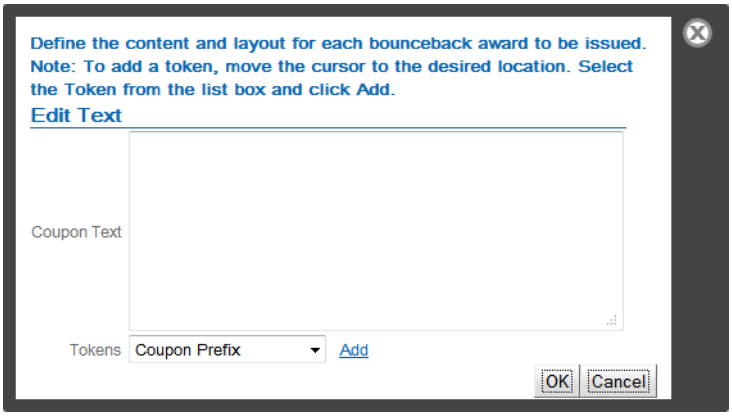


Figure 10-20: Edit Text Window

3) In the **Coupon Text** field, enter the text for the Bounceback Coupon.

4) Use the **Tokens** Selection Menu to select a token to add to the Coupon, then click the **Add** Link to insert it into the **Coupon Text** field.

5) When you are finished, click **OK** to save the Coupon Text and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window, or click the **Cancel** button.

31. Click **next**.

The Define Targets step opens.

32. Define the Segment Target Eligibility Rules for the Promotion:



Figure 10-21: Define Targets Step

a. Use the Radio Buttons to select the type of Targets.

- **Untargeted** - **[DEFAULT]** The Promotion has no Segment Targets.

  If you selected **Include Social Listening**, continue with step 48 on page 343.

  If you did not select **Include Social Listening**, continue with step 54 on page 346.

- **Exclusive** - The Promotion is only limited to Customers within the eligible Segments. Continue with step b.

- **Non-exclusive** - The Promotion is directed toward eligible Segments, but other Customers can take advantage of it. Continue with step b.

b. The next step you perform depends upon the configuration of both your system and your User account:

- If the **Targeting Type** Radio Buttons open, continue with step c.

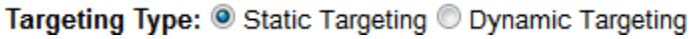


Figure 10-22: Targeting Type

- Otherwise, continue with step e.

The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `Relate_PromotionDynamicTargetAdmin` *or* `Relate_SystemAdmin` *Role.*

See also: The *Relate Configuration Guide* for more information about enabling software features and configuring Roles.

c. Select the **Targeting Type** for the Promotion.

- **Static Targeting** - Once the Target is created, the list of Customers in the Target will not change.

  Continue with step e.

- **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.

The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See "Dynamic Promotions" on page 666 for more information.

Dynamic Targeting Option Radio Buttons open.

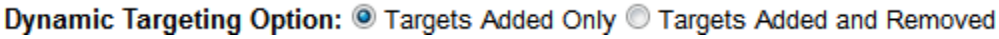


Figure 10-23: Dynamic Targeting Option

Continue with step d.

d. Select the **Dynamic Targeting Option** for the Promotion.

- **Targets Added Only** - When the Dynamic Promotions Job runs, any new Customers found that meet the Target criteria are added to the Target. All Customers currently in the Target remain in the Target.
- **Targets Added and Removed** - When the Dynamic Promotions Job runs, only the Customers who meet the Target criteria will be included in the Target. If a Customer is in the Target before the Job runs, but no longer meets the criteria, that Customer is removed from the Target.

e. Define the Segment Targets for the Promotion.

- For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.

- For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.

33. Click **next**.

- If you selected **Static Filtering** (see above), the Define Target Filtering Step opens. Continue with the next step.
- If you selected **Dynamic Targeting** (see above), the Control Groups step opens. Continue with step 39 on page 333.

34. Define the Target Filter for each Segment Target:

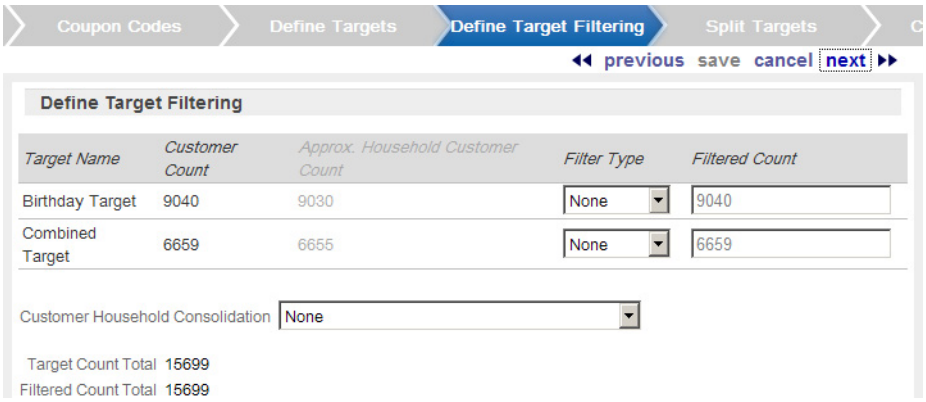


Figure 10-24: Define Target Filtering Step

a. Select the **Filter Type** for each Segment:

- **None** - **[DEFAULT]** All Customers in the Segment are eligible.
- **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Segment will be chosen randomly for eligibility.

b. If the Filter Type for the Segment is Top Sales or Random, enter the **Filter Count** of Customers eligible for the Promotion.

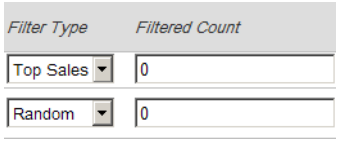


Figure 10-25: Enter Filter Count

35. Use the **Customer Household Consolidation** Selection Menu to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

This Selection Menu has the following options:

- **None** - Do not perform household filtering.
- **LT Sales** - Select head of household based on amount purchased over the lifetime of their account.

- **LT Transaction Count** - Select head of household based on lifetime number of transactions.
- **Last Transaction Date** - Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** - Select head of household based on the Customer's numeric attributes.

36. Click **next**.

The Split Targets step opens.

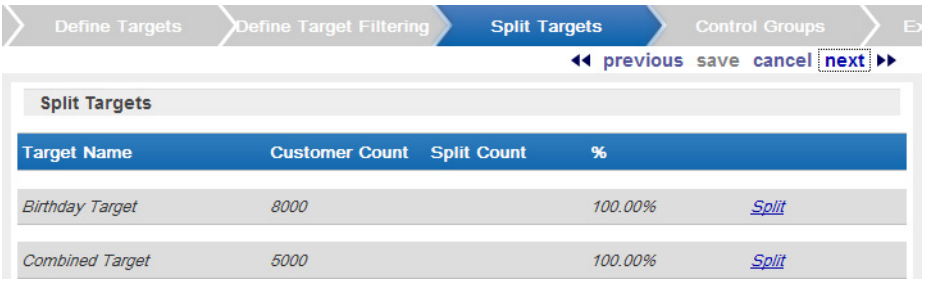


Figure 10-26: Split Targets Step

37. Filtered Targets can, optionally, be split into smaller, separate Targets. If necessary, create Splits for the filtered Targets in the Promotion:

a. Click **Split** for each Split to be created in the Target (click **Split** once for two Splits, click twice for three Splits, click three times for four Splits, etc.).

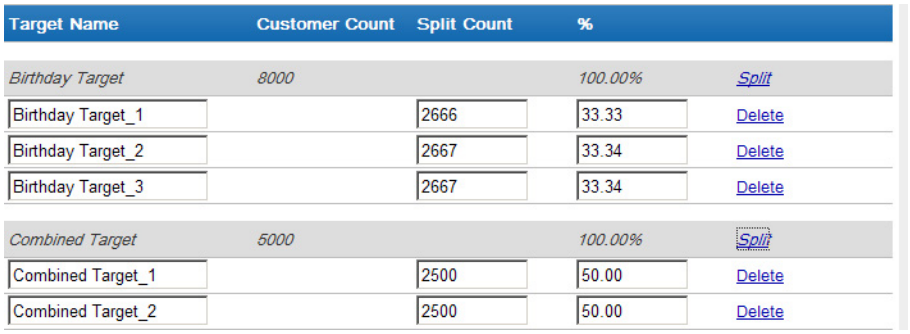


Figure 10-27: Splits

b. Optionally, change the name of the Split in the **Target Name** field for each Split.

c. Adjust the Split distribution as necessary:

- Change the number of Customers in each Split in the **Split Count** fields.
- Change the percentage of Customers in each Split in the **%** fields.

The total number of Customers in the Splits must equal the number of Customers in the target. If the numbers are not equal, Split Count will display the difference.

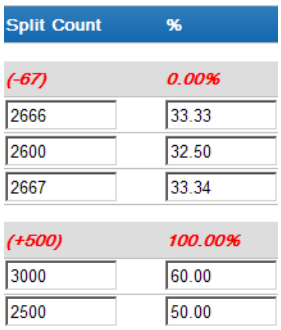


Figure 10-28: Split Counts Incorrect

d. If necessary, remove a Split by clicking the **Delete** Link for the Split.

38. Click **next**.

The Control Groups step opens.

39. Use the Radio Buttons to select the type of Control Groups:

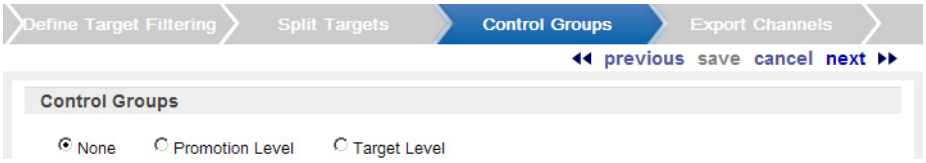


Figure 10-29: Control Groups Step

If **Dynamic Targeting** *was selected for the Promotion, the Control Groups created cannot be changed. The Customers in the Control Group will remain in the Control Group throughout the Promotion.*

- **None** - **[DEFAULT]** The Promotion has no Control Group. Continue with step 40 on page 334.

- **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

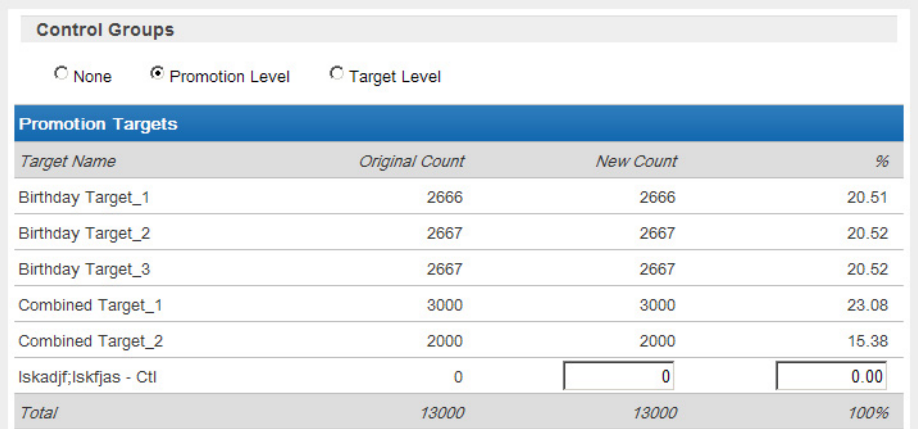


Figure 10-30: Control Group - Promotion Level

If this option is selected, determine the size of the Control Group by doing one of the following:

- In the **New Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

- **Target Level** - The Control Group Customers are pulled from each Split/Target in numbers specified individually for each Split/Target.

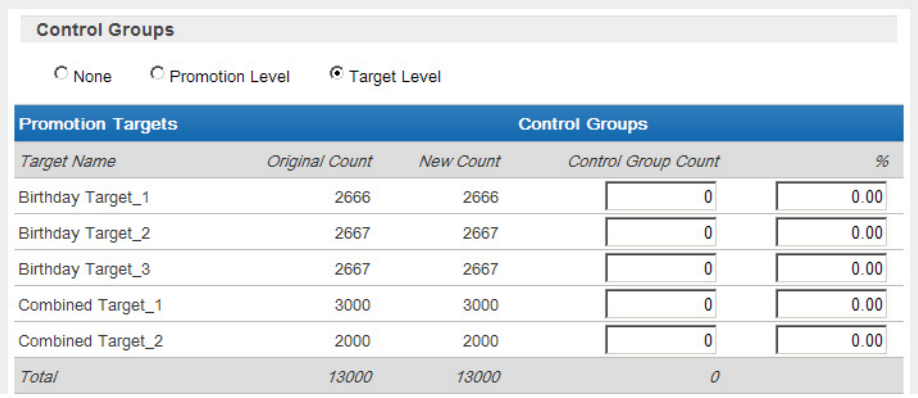


Figure 10-31: Control Group - Target Level

If this option is selected, determine the size of each Control Group by doing one of the following for each Split/Target:

- In the **Control Group Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

40. Click **next**.

The Export Channels step opens.

41. For each Split/Target, select the method used to contact the Customers in each Split/Target.

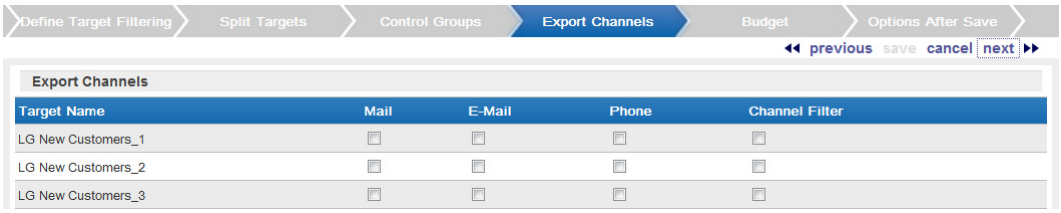


Figure 10-32: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.
- **Email** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email.
- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.
- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

  If this Check Box has a checkmark (☑), Channel Filter options are displayed.

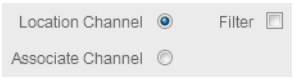


Figure 10-33: Channel Filter Options

Channel Filters have the following options:

- Radio Buttons that determine the type of Channel.

  Location Channel - Customers are contacted by the Location.

  Associate Channel - Customers are contacted by their Assigned Associates.
- **Filter** - This Check Box determines whether the export channel is filtered. If this Check Box has a checkmark (☑), additional Channel Filter options are displayed.



Figure 10-34: Filter Options

- **Max Count Per <Type>** - Determines the maximum number of target Customers that will be contacted through the channel. This field is only enabled if the **Filter** option was selected.
- **Method** - Method used to select the Customers contacted. This field is only enabled if the **Filter** option was selected. This Selection Menu has the following options:

  Random - **[DEFAULT]** Select Customers randomly.

Top - Recent Purchase - Filter the Customers based on the most recent purchases.

Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

- **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

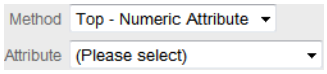


Figure 10-35: Numeric Attribute Filter

42. Click **next**.

- If the **Email** Export Channel was selected and Email Service Provider Integration is enabled in the system (see the *Relate Configuration Guide* for more information), the Email Content step opens. Continue with the next step.
- If **Include Social Listening** was selected (and the **Email** Export Channel was not), the Social Listening step opens. Continue with step 48 on page 343.
- If the **Channel Filter** Export Channel was selected (and the **Email** Export Channel and **Include Social Listening** were not), the Event Definition step opens. Continue with step 52 on page 345.
- If none of the options above were selected, the Budget step opens. Continue with step 54 on page 346.

43. Configure the Email Content.

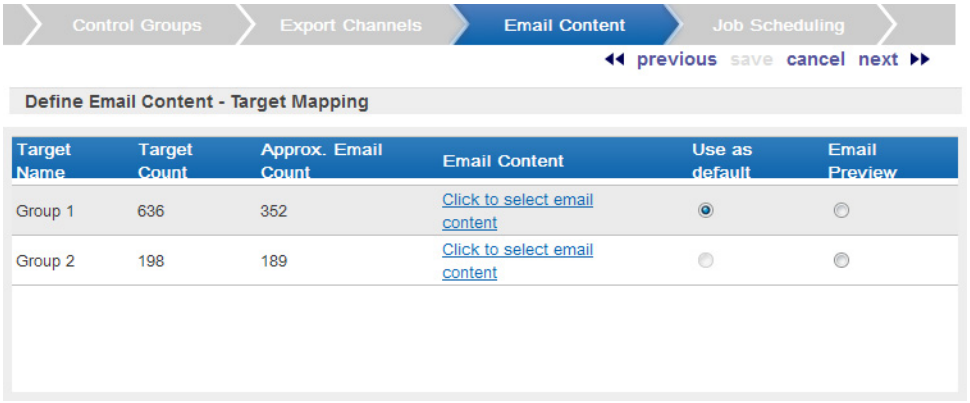


Figure 10-36: Email Content Step

a. Use the **User as Default** Radio Buttons to determine which email will be the default.

If a Customer is in more than one Group within the Promotion, that Customer will receive the email for the default Group.

b. For each Group in the Target Mapping List, click the **Click to select email content** Link to open the Email Content Template Window.



Figure 10-37: Email Content Template Window

c. Select a template in the Email Content Template Window:

1) On the left side of the Window, use the expand (⊞) buttons to find and open the proper folder for the template.

2) Click the folder where the template is located.

A List of templates opens.

Name	*Subject*	*Select*
Sample Email 1	Sample Email 1	Select template
Sample Email 2	Sample Email 2	Select template

Figure 10-38: Template List

3) Click a template to view it.

4) Click the **Select template** link to select a template and close the Email Content Template Window.

5) The template is entered in the Target Mapping List for the Group.

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	636	352	Sample Email 1	Edit	Remove		
Group 2	198	189	Click to select email content				

Figure 10-39: Target Mapping List - Email Template Selected

To preview an email template, use the **Email Preview** *Radio Buttons to view the templates below the Target Mapping List.*

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	1019	391	Sample Email 2	Edit	Remove		
Group 2	1019	391	Click to select email content				

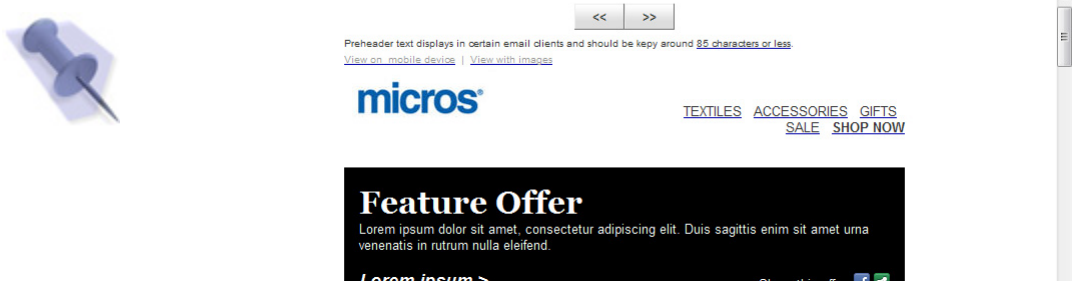


Figure 10-40: Email Preview

44. If necessary, change the email template for one or more Groups.

- ❑ To change the email template:
  - **1)** Click the **Edit** link.
  - **2)** Follow the procedure in step c on page 337.
- ❑ To remove a template, click the **Remove** link.

45. Configure the Email Delivery Job Schedule options in the Job Scheduling step.

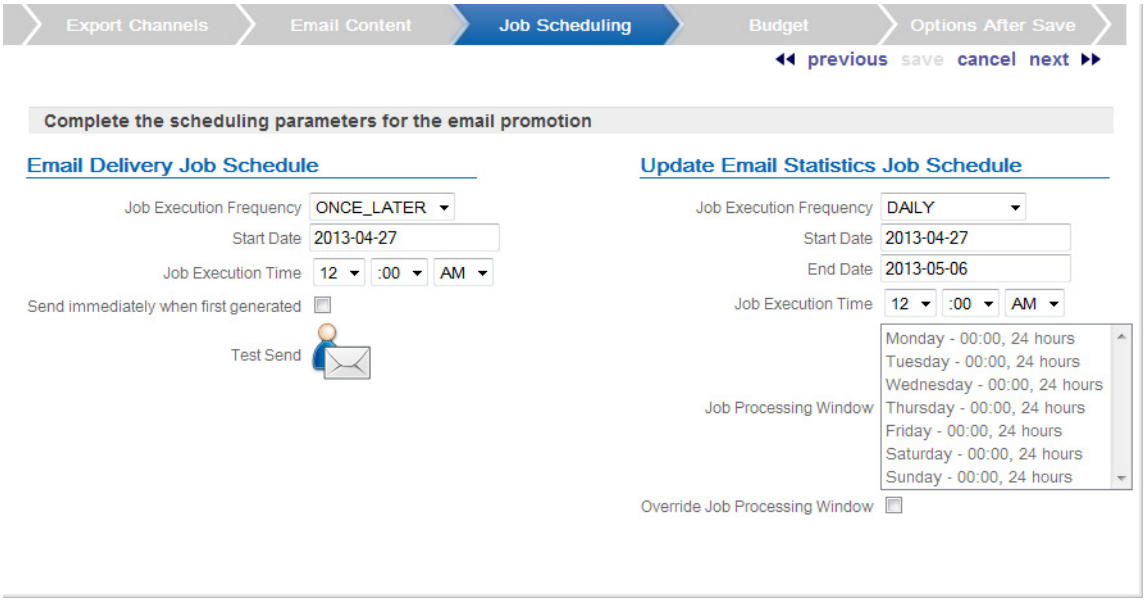


Figure 10-41: Email Delivery Step

a. Use the **Job Execution Frequency** Selection Menu to determine how often emails will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - **[DEFAULT]** Send emails for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - Send emails for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Send emails for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Send emails for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the Promotion emails will be sent:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the emails will be sent. ■ **Job Execution Time** - These Time Menus select the time at which the emails will be sent.

Query Execution Frequency	Configurations
DAILY	■ **Start Date** - This Calendar Menu selects the date on which emails will be sent. ■ **End Date** - This Calendar Menu selects the last date on which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent each day.
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Week** - This Calendar Menu determines the day of the week on which emails will be sent (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the emails will be sent.

c. Use the **Initialize when first generated** Check Box to indicate when the messages will be sent.

- **Unchecked** (☐) - **[DEFAULT]** Send messages at the indicated **Query Execution Time**.
- **Checked** (☑) - Send messages immediately upon generating the emails.

d. If necessary, do the following to send a test email message:

1) Click the **Test Send** icon ().

2) The Test Email Send Window opens.



Figure 10-42: Test Email Send Window

3) Enter each test recipient email in an **Email Addresses** Text Field (limit 3). Note that only one email address can be entered in each **Email Addresses** Text Field.

46. Configure the Update Email Statistics Job Schedule options in the Job Scheduling step.

a. Use the **Job Execution Frequency** Selection Menu to determine how often the email statistics will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - Update the statistics for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - **[DEFAULT]** Update the statistics for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Update the statistics for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Update the statistics for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the email statistics will be updated:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **Job Execution Time** - These Time Menus select the time at which the statistics will be updated.
DAILY	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last date on which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated.

Query Execution Frequency	Configurations
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Week** - This Calendar Menu determines the day of the week on which the statistics will be updated (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the statistics will be updated.

c. Use the **Override Job Processing** Check Box to determine whether the Email Statistics Job can run during a time outside the times displayed in the **Job Processing Window**.

47. Click **next**.

- ❑ If **Include Social Listening** was selected, the Social Listening step opens. Continue with step 48 on page 343.
- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with step 52 on page 345.
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with step 54 on page 346.

48. Define the keywords used by the Social Listening process:

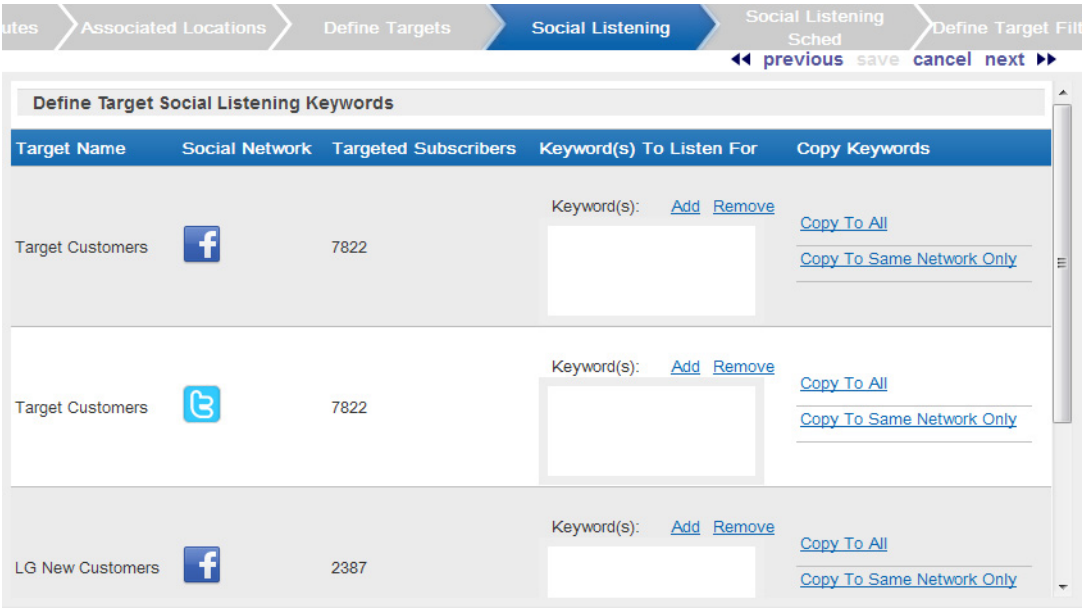


Figure 10-43: Social Listening Step

In Define Target Social Listening Keywords List, each social network configured for the system is listed once for each Target defined for the Promotion.

a. Add a keyword set to the social network for a Target:

1) Click the **Add** Link for a social network.

A Text Area Field opens.

2) Enter the keyword(s) to listen for into the Text Area Field.

3) Repeat steps 1-2 for each keyword set to enter for the social network.

b. If necessary, copy the keyword sets to other social networks:

Copying the keyword set(s) will REPLACE (rather than add to) currently configured any keyword set(s).

For example, Network 1 has the keyword set "great item" and Network 2 has the keyword sets "still shopping" and "fantastic experience at the store". The user then clicks the **Copy To All** *Link for Network 1. The only keyword set for Network 2 is now "great item".*

- Click the **Copy to Same Network Only** Link to copy the keyword set to the same social network for each Target.

  For example, if you enter "fantastic sale" in one Twitter row, clicking the **Copy to Same Network Only** Link will create a keyword set "fantastic sale" to the Twitter row for every Target.

- Click the **Copy to All** Link to copy the keyword set(s) to every social network for every Target.

c. If necessary, remove a set of keyword set from a Target's social network by clicking the Text Area Field for the keyword set, then clicking the **Remove** Link.

d. Repeat steps a-c as necessary for each Target and social network.

49. Click **next**.

The Social Listening Schedule step opens.

50. Configure the frequency at which the Job will check social media:

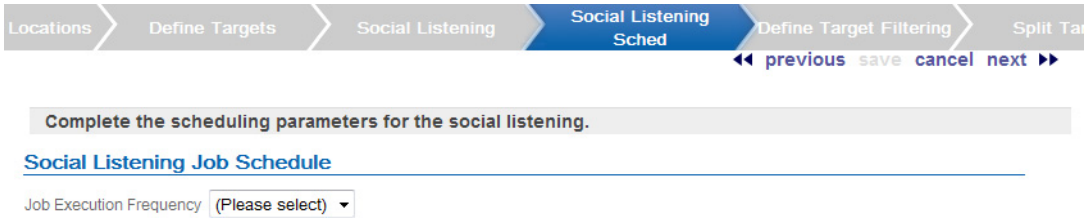


Figure 10-44: Social Listening Schedule Step

a. Select the **Job Execution Frequency** using the Selection Menu.

- **ONCE_LATER** - Run the Segment Query at a later date or time.
- **DAILY** - Run the Segment Query every day.
- **WEEKLY** - Run the Segment Query once each week.
- **MONTHLY** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **ONCE_LATER**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **DAILY**, continue with step f.
- If you selected a Job Execution Frequency of **WEEKLY**, continue with step d.
- If you selected a Job Execution Frequency of **MONTHLY**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

51. Click **next**.

- ❑ If the **Channel Filter** Export Channel was selected, the Event Definition step opens. Continue with the next step.
- ❑ If the **Channel Filter** Export Channel was not selected, the Budget step opens. Continue with step 54 on page 346.

52. Configure the Event Definition.

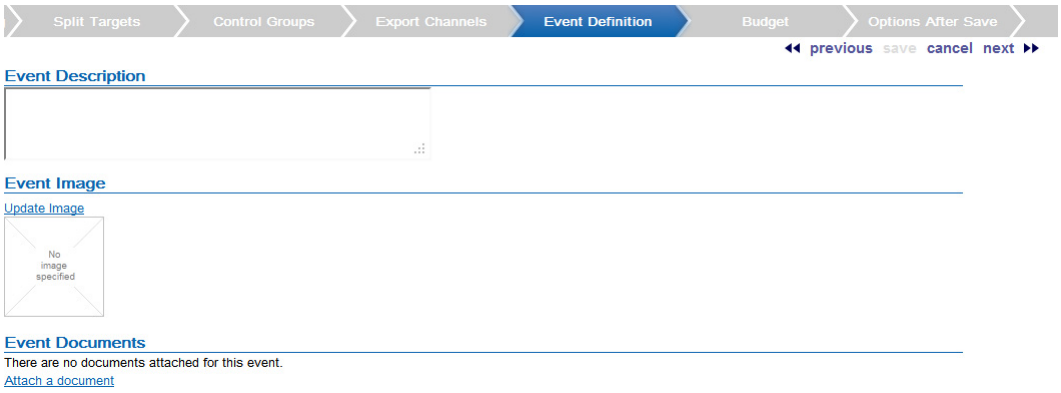


Figure 10-45: Event Definition Step

a. Enter a description of the Event in the **Event Description** field.

b. If necessary, change the image file for the Event. To change the image:

1) Click the **Update Image** Link.

The Update Image Window opens.

2) Select the **Action** using the Radio Buttons.

Select **Import Image**, to add or change the image and continue with step 3.

Select **Reset Image** to remove the image and continue with step 4.

3) Use the **File to Import** File Upload field to select the file to import.

4) Click the **Done** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

c. If necessary, attach a document to the Event. To upload a document:

1) Click the **Attach a document** Link.

The Attach a Document Window opens.

2) Use the **Please select file to Upload** File Upload field to select the file to import.

3) Click the **Upload file** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

d. To remove a document from the Event Documents List, click the **Remove** Link for the document.



Figure 10-46: Event Documents List

The document is removed from the List.

53. Click **next**.

The Budget step opens.

54. Configure the Budget for the Promotion:

a. In the Promotion Costs List, enter the costs for the Promotion that are not specific to a Target:

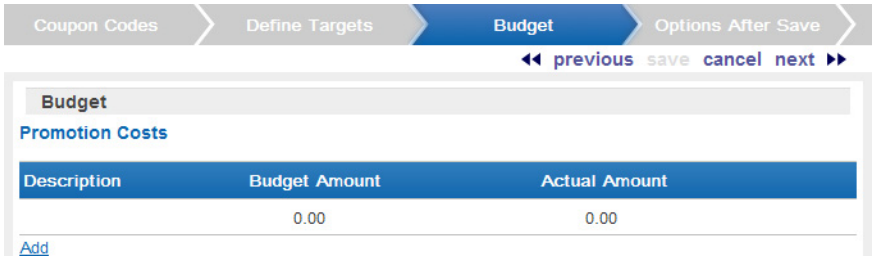


Figure 10-47: Budget Step for an Untargeted Promotion

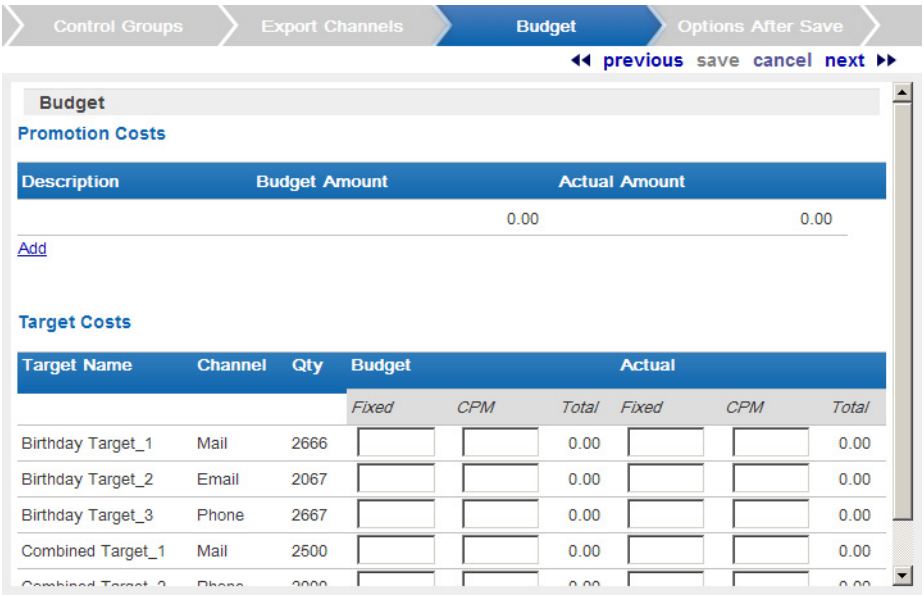


Figure 10-48: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

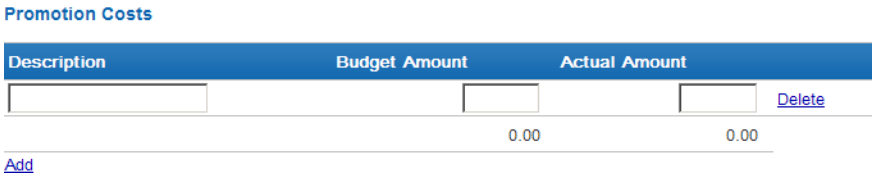


Figure 10-49: Promotion Costs

2) Enter a **Description** of the cost item.

3) Enter the budgeted amount of the item in the **Budget Amount** field.

4) Enter the actual amount of the item in the **Actual Amount** field.

5) Repeat steps 1-4 for each budget line item to add to the Promotion Costs.

6) If necessary, remove a line item by clicking its **Delete** Link.

b. If Targets are defined for the Promotion, use the Target Costs List to define the costs for each Target Channel in the Promotion:

1) In the **Budget-Fixed** field, enter the fixed cost budgeted for the Channel.

2) In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.

3) In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.

4) In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.

5) Repeat steps 1-4 for each Target Channel in the Promotion.

55. Click **next**.

The Options After Save step opens.

56. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

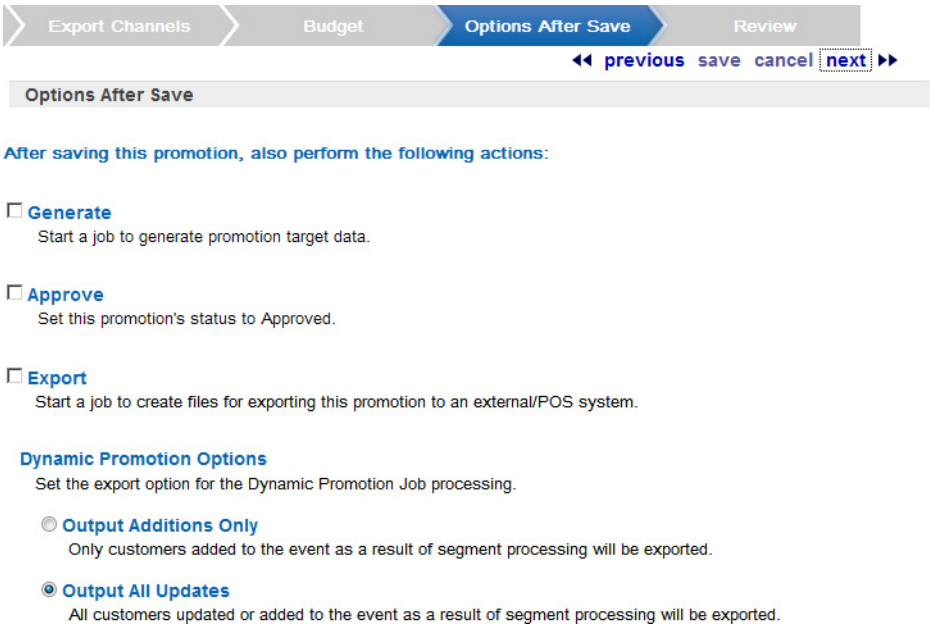


Figure 10-50: Options After Save Step

- **Generate** - Generate the Promotion Target data. This option only appears if the Promotion is targeted.
- **Approve** - Automatically approve the promotion.
- **Export** - Export the Promotion data to external systems, including POS systems.
- **Dynamic Promotion Options** - Export options for dynamic Promotions. These options only appear if the Promotion has dynamic Targets. Select the option using the Radio Buttons:
  - **Output Additions Only** - Relate will only export the Customers added to the Promotion event by the Dynamic Promotions Job.
  - **Output All Updates** - Relate will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

57. Click **next**.

The Review step opens.

58. Review the entered information to ensure that it is correct.

- Click **save** to save the Promotion with its current configuration.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to cancel the changes and return to the Promotion List without saving the Promotion.

CHAPTER 11

Create a Product with Bounceback Promotion



Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to **True***.*

The Product with Bounceback Promotion created by Relate is not available in the base implementation of Xstore. Modifications must be made to Xstore to enable Bounceback Promotions. Your account manager or implementation consultant can provide additional detail.

See also: The *Relate Configuration Guide* for more information.

To create a Product with Bounceback Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

The New Promotion Wizard opens on the Promotion Type step.

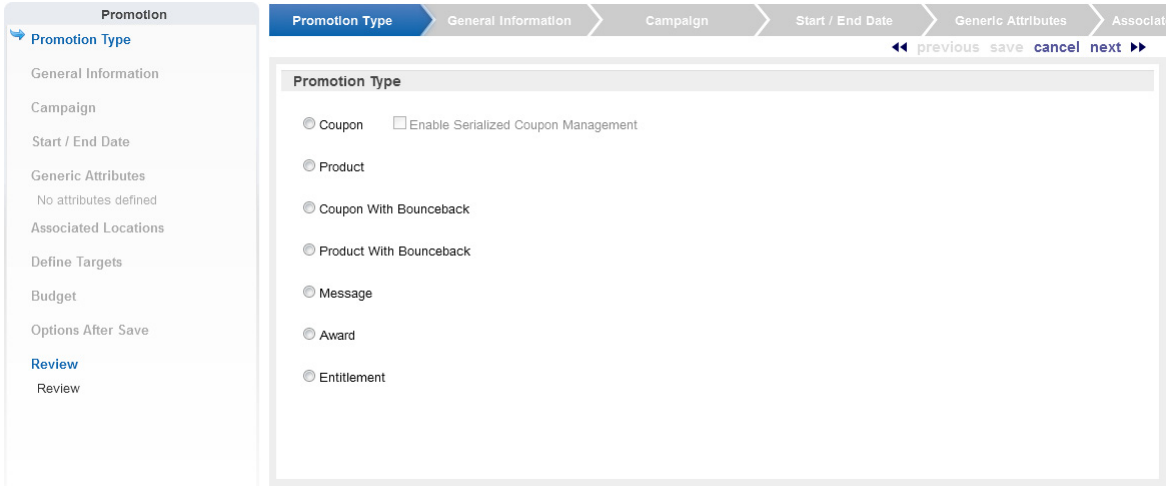


Figure 11-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Product with Bounceback**.
3. Click **next**.

   The General Information step opens.
4. Configure the General Information for the Promotion:

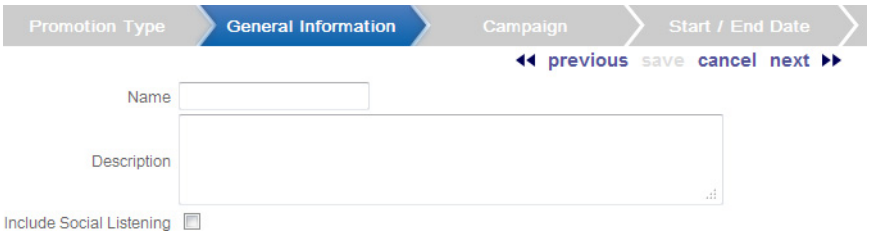


Figure 11-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.
   b. Enter a **Description** of the Promotion in the Description Text Field.
   c. Use the **Social Listening** Check Box to indicate whether social-media listening features will be enabled for the Promotion.



This Check Box is only available if social media access has been enabled in Conflate, and the User has been assigned the Relate_SystemAdmin and/or Relate_PromotionSocialListeningAdmin Role.

See also: *The* Relate Configuration Guide *for more information about Conflate, configuring social media access, and User Roles.*

5. Click **next**.

   The Campaign step opens.

6. Select how the Campaign should be associated with the Promotion:



Figure 11-3: Campaign Step

- **Auto create campaign** - Relate will automatically create a new Campaign.
- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.

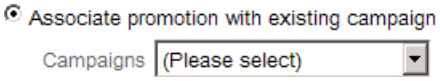


Figure 11-4: Campaigns Dropdown Menu

  Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.



Figure 11-5: Create Campaign Fields

  1) Enter the **Name** of the Campaign in the Name field.
  2) Enter a **Description** of the Campaign in the Description field.

7. Click **next**.

   The Start/End Date step opens.

8. Configure the Start and End Dates for the Promotion:

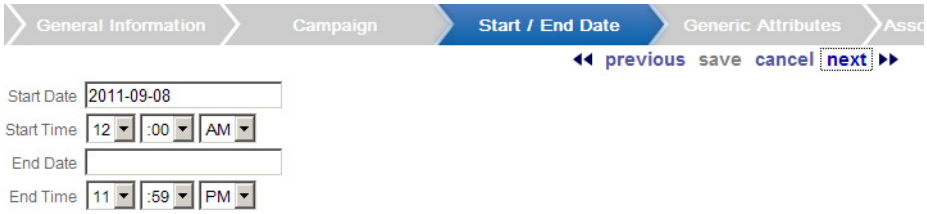


Figure 11-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date Calendar Menu.

b. Select the **Start Time** for the Promotion using the Start Time Time Menus.

c. Select the **End Date** for the Promotion using the End Date Calendar Menu.

d. Select the **End Time** for the Promotion using the End Time Time Menus.

9. Click **next**.

The Generic Attributes step opens.

10. Select or enter the configuration values for each of the **Required** Attributes.

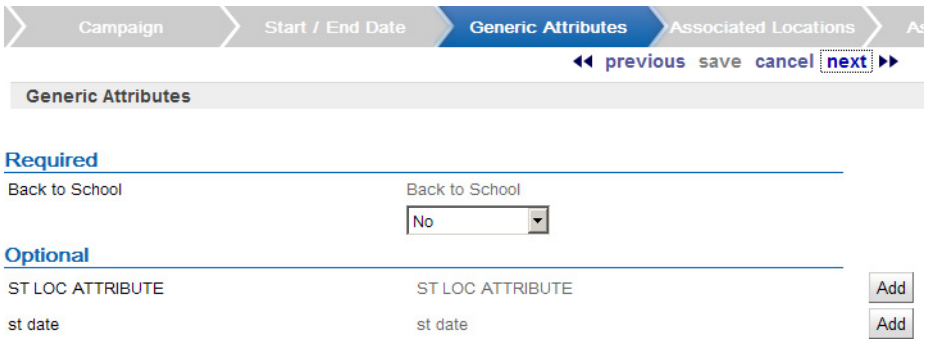


Figure 11-7: Generic Attributes Step

11. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

12. Click **next**.

The Associated Locations step opens.

13. Define the Location Eligibility Rules for the Promotion.

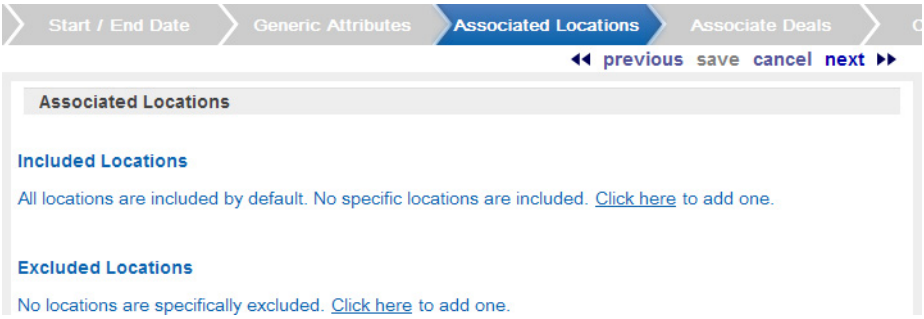


Figure 11-8: Associated Locations Step

- For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.
- For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.

14. Click **next**.

The Associate Deals step opens.

15. If necessary, create a default Bounceback Coupon.

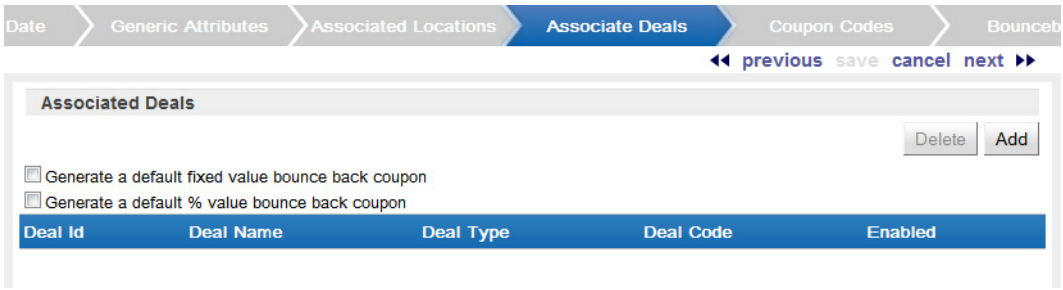


Figure 11-9: Associate Deals - Bounceback Coupon

To create a default Bounceback Coupon for the Promotion, click to place a checkmark (☑) in the proper Check Box:

- **Generate a default fixed value bounce back coupon** - Bounceback with a fixed value discount.
- **Generate a default % value bounce back coupon** - Bounceback with a percentage discount.

16. Add the Deal(s) for the Promotion:

e. Click the **Add** button.

A Deal List Window opens.

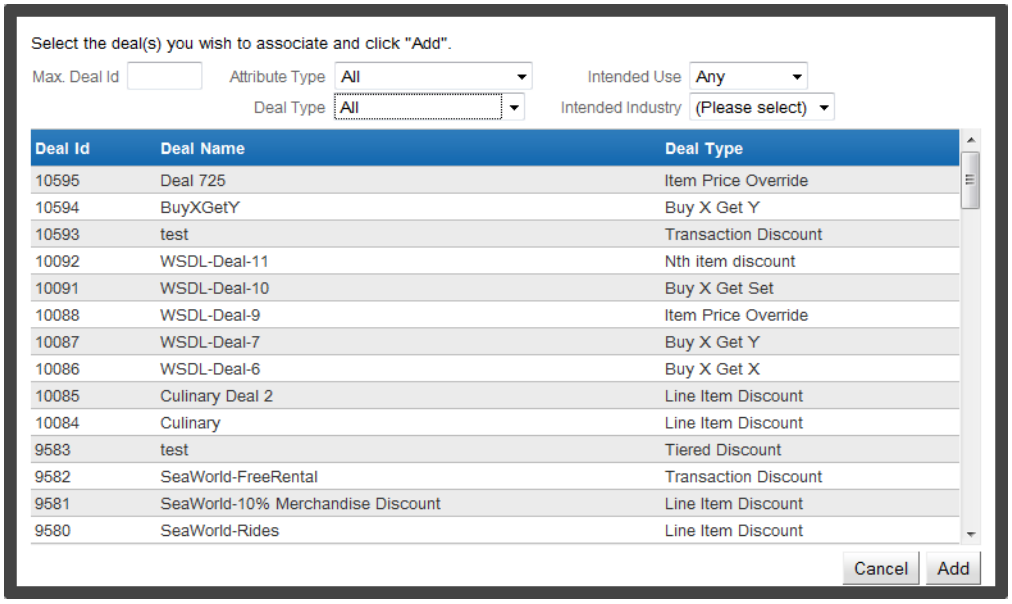


Figure 11-10: Deal List Window

f. If necessary, use the Filter fields to display a subset of Deals.

- **Max Deal Id** - This Text Field filters the List with a maximum number for the Deal ID. The List will only show Deals with an ID less than or equal to the entered value.
- **Attribute Type** - This Selection Menu filters the List by the type of Attribute assigned to the Deal. Select **All** **[DEFAULT]** to view Deals with any or no Attribute assigned.

  Upon selecting an Attribute Type, another Filter field opens that can be used to filter the List by Attribute value. *The type of field depends upon the Attribute's Data Type.*

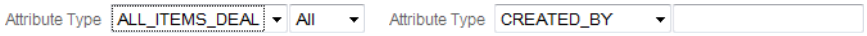


Figure 11-11: Attribute Value Fields

- **Deal Type** - This Selection Menu filters the List by Deal Type, and contains all the types of Deals that can be created in Relate. Select **All** **[DEFAULT]** to view all types of deals.
- **Intended Use** - This Selection Menu filters the List by the Intended Use of the Deal.
- **Intended Industry** - This Selection Menu filters the List by the intended industry of the Deal: either **Merchandise** or **Culinary**.

g. Click a Deal to select it. You can select multiple Deals.

h. Click the **Add** button to add the Deal(s) to the Promotion, or click the **Cancel** button to exit the Window without changing the List of Deals associated with the Promotion.

Deal Id	Deal Name	Deal Type	Deal Code	Enabled
260	0907_51	Line Item Discount		☑

Figure 11-12: Deal Added

i. If necessary, return to step e to add another Deal to the Promotion.

> *A Bounceback Promotion must have at least two Deals added. The Deals can be selected from existing Deals, or one Deal can be selected and a default Deal can be added (step 15).*

17. For each Deal in the Associated Deals List that will have a Deal Code assigned to it, enter that Code in the **Deal Code** Text Field.

18. For each Deal in the Associated Deals List, use the **Enabled** Check Box to select whether the Deal will be active in the Promotion.

19. Click **next**.

The Promo-Deal Attributes step opens.

20. Configure the Deal Attributes for the Promotion event:

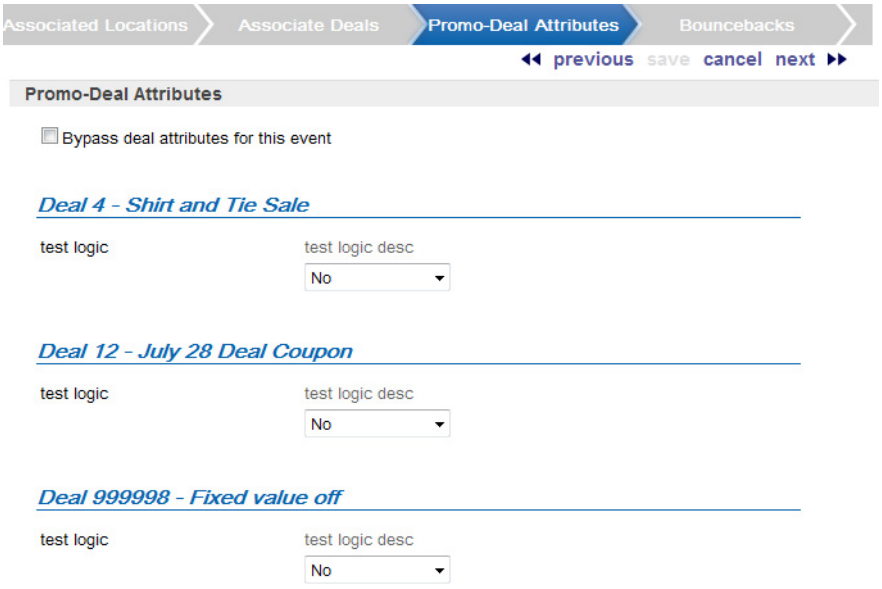


Figure 11-13: Promo-Deal Attributes Step

a. Use the **Bypass deal attributes for this event** Check Box to determine whether Deal Attributes will be used for this Promotion event:

- **Checked** (☑) - Attributes will NOT be used. The available attributes are removed from the screen. Continue with step 21.

- **Unchecked** (☐) - Attributes will be used. The available attributes are displayed. Continue with the next step.

b. Configure the Attribute(s) for the Deal(s).

21. Click **next**.

The Bouncebacks step opens.

22. Indicate which Deal(s) will be the Bounceback Deal(s).

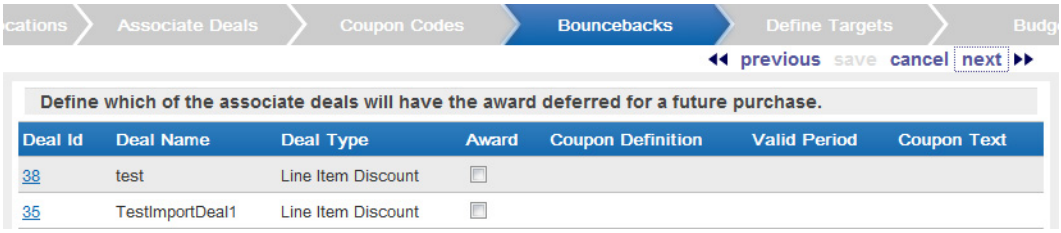


Figure 11-14: Bouncebacks Step

Only Line Item Discount and Transaction Discount Deals will be displayed. A Deal of any other type cannot be used as a Bounceback award, or as a trigger.

- Click to enter a checkmark in the **Award Deferred** Check Box for the Deal(s) that will issue the Bounceback.

The **Award Deferred** *Deal is the Deal that triggers a Bounceback. For the actual Bounceback, this Check Box is left unchecked (☐).*

The Bounceback configuration fields are displayed.

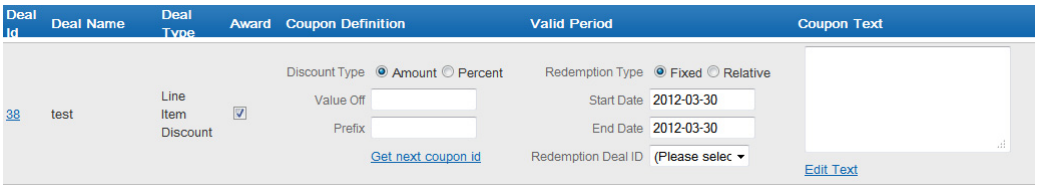


Figure 11-15: Bounceback Configuration Fields

- If the option to generate a default Bounceback Coupon was selected in step 1, the default bounceback coupon is automatically selected as the issuing Deal.

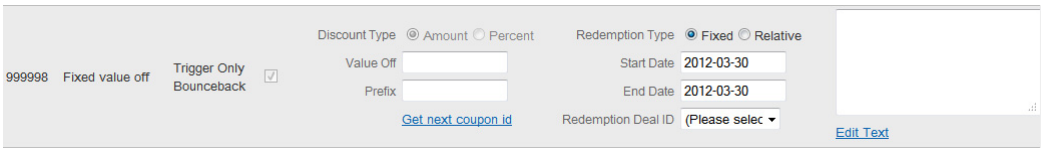


Figure 11-16: Default Bounceback Coupon

23. Enter the configuration information for the Bounceback.

- **Discount Type** - Method used to determine the Bounceback discount. This field is inactive for default Deals. These Radio Buttons have the following options:
  - **Amount** - Discount is a fixed currency amount.
  - **Percent** - Discount is a percentage of an amount.
- **Value Off** - Amount of the discount. This is either an amount or a percentage off, depending on the **Discount Type** configuration.
- **Prefix** - Coupon Prefix for the Bounceback Coupon.

  If the Organization is configured for Promotion Coupon Management, click the **Get next coupon id** Link to add a sequentially-generated Coupon Code.
- **Redemption Type** - The method used to determine the valid dates for the Bounceback. These Radio Buttons have the following options:
  - **Fixed** - Bounceback can be redeemed during a specified date range. This option has the following configurations:

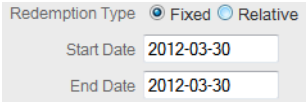


Figure 11-17: Fixed Redemption Type

Start Date - Date on which the Bounceback becomes valid.

End Date - Last date on which the Bounceback is valid.

  - **Relative** - Bounceback can be redeemed during a specified time period immediately after the Bounceback is issued. This option has the following configurations:

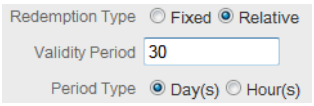


Figure 11-18: Relative Redemption Type

Validity Period - Period during which the Bounceback is valid. The type of period is determined by the Period Type configuration.

Period Type - Units of time used to determine the validity period. These Radio Buttons are used to select either **Day(s)** or **Hour(s)**.

- **Redemption Deal ID** - This Selection Menu determines the Deal whose Eligibility Rules are used for the Bounceback.

> *The Bounceback Coupon only uses the Eligibility Rules from the Deal selected here. No discount information from the Redemption Deal is used by the Bounceback.*

- **Coupon Text** - This field contains the text that is displayed on the Bounceback Coupon. To edit this field:

  1) Click the **Edit Text** Link.

  2) The Edit Text Window opens.

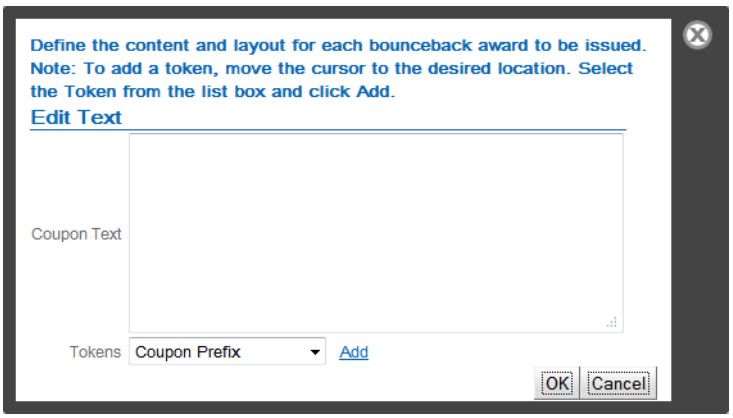


Figure 11-19: Edit Text Window

  3) In the **Coupon Text** field, enter the text for the Bounceback Coupon.

  4) Use the **Tokens** Selection Menu to select a token to add to the Coupon, then click the **Add** Link to insert it into the **Coupon Text** field.

  5) When you are finished, click **OK** to save the Coupon Text and close the Window.

  To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window, or click the **Cancel** button.

24. Click **next**.

The Define Targets step opens.

25. Define the Segment Target Eligibility Rules for the Promotion:



Figure 11-20: Define Targets Step

a. Use the Radio Buttons to select the type of Targets.

- **Untargeted** - **[DEFAULT]** The Promotion has no Segment Targets.

  If you selected **Include Social Listening**, continue with step 41 on page 372.

  If you did not select **Include Social Listening**, continue with step 47 on page 375.

- **Exclusive** - The Promotion is only limited to Customers within the eligible Segments. Continue with step b.
- **Non-exclusive** - The Promotion is directed toward eligible Segments, but other Customers can take advantage of it. Continue with step b.

b. The next step you perform depends upon the configuration of both your system and your User account:

- If the **Targeting Type** Radio Buttons open, continue with step c.



Figure 11-21: Targeting Type

- Otherwise, continue with step e.



The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `Relate_PromotionDynamicTargetAdmin` *or* `Relate_SystemAdmin` *Role.*

See also: The *Relate Configuration Guide* for more information about enabling software features and configuring Roles.

c. Select the **Targeting Type** for the Promotion.

- **Static Targeting** - Once the Target is created, the list of Customers in the Target will not change.

  Continue with step e.

- **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.



The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See "Dynamic Promotions" on page 666 for more information.

Dynamic Targeting Option Radio Buttons open.

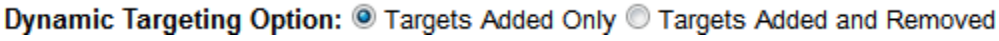


Figure 11-22: Dynamic Targeting Option

Continue with step d.

d. Select the **Dynamic Targeting Option** for the Promotion.

- **Targets Added Only** - When the Dynamic Promotions Job runs, any new Customers found that meet the Target criteria are added to the Target. All Customers currently in the Target remain in the Target.
- **Targets Added and Removed** - When the Dynamic Promotions Job runs, only the Customers who meet the Target criteria will be included in the Target. If a Customer is in the Target before the Job runs, but no longer meets the criteria, that Customer is removed from the Target.

e. Define the Segment Targets for the Promotion.

- For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.
- For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.

26. Click **next**.

- If you selected **Static Filtering** (see above), the Define Target Filtering Step opens. Continue with the next step.
- If you selected **Dynamic Targeting** (see above), the Control Groups step opens. Continue with step 32 on page 363.

27. Define the Target Filter for each Segment Target:

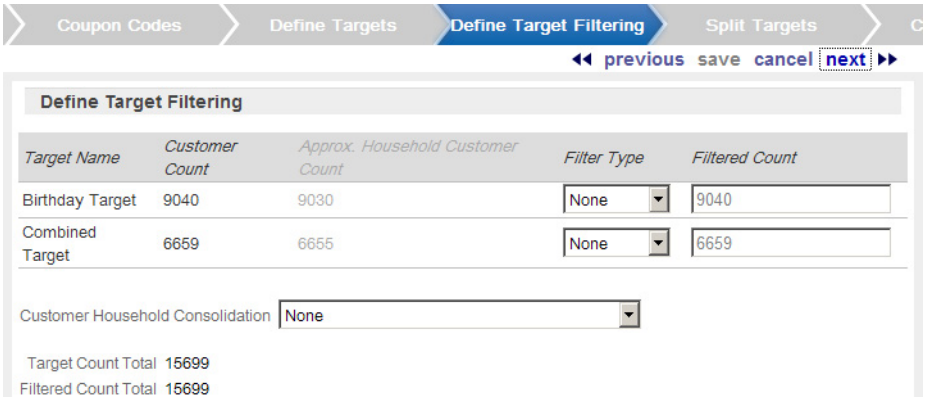


Figure 11-23: Define Target Filtering Step

a. Select the **Filter Type** for each Segment:

- **None** - **[DEFAULT]** All Customers in the Segment are eligible.
- **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Segment will be chosen randomly for eligibility.

b. If the Filter Type for the Segment is Top Sales or Random, enter the **Filter Count** of Customers eligible for the Promotion.

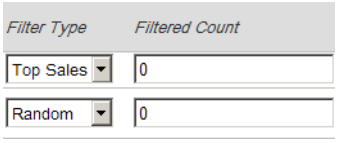


Figure 11-24: Enter Filter Count

28. Use the **Customer Household Consolidation** Selection Menu to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

This Selection Menu has the following options:

- **None** - Do not perform household filtering.
- **LT Sales** - Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** - Select head of household based on lifetime number of transactions.
- **Last Transaction Date** - Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** - Select head of household based on the Customer's numeric attributes.

29. Click **next**.

The Split Targets step opens.

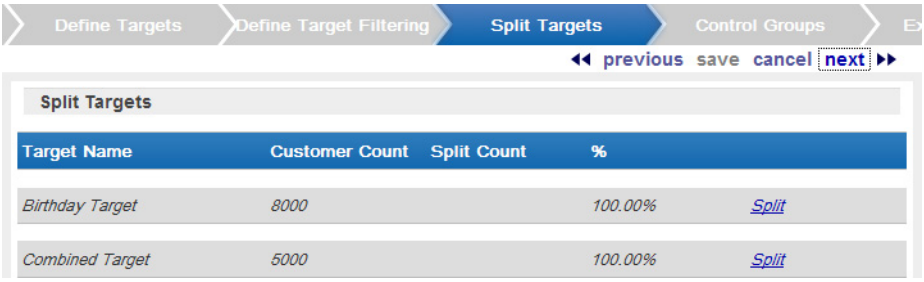


Figure 11-25: Split Targets Step

30. Filtered Targets can, optionally, be split into smaller, separate Targets. If necessary, create Splits for the filtered Targets in the Promotion:

a. Click **Split** for each Split to be created in the Target (click **Split** once for two Splits, click twice for three Splits, click three times for four Splits, etc.).

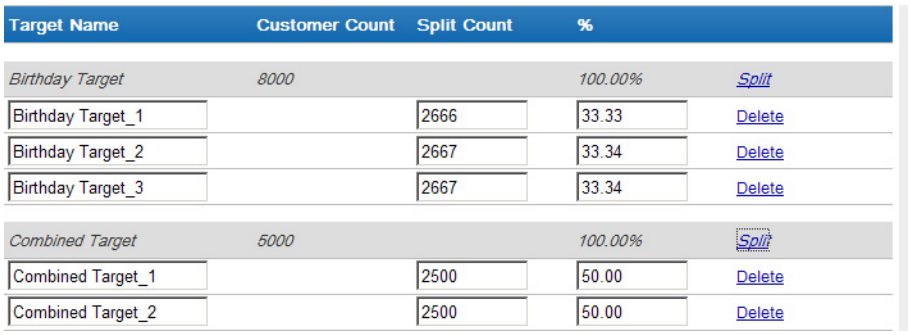


Figure 11-26: Splits

b. Optionally, change the name of the Split in the **Target Name** field for each Split.

c. Adjust the Split distribution as necessary:

- Change the number of Customers in each Split in the **Split Count** fields.
- Change the percentage of Customers in each Split in the **%** fields.

The total number of Customers in the Splits must equal the number of Customers in the target. If the numbers are not equal, Split Count will display the difference.

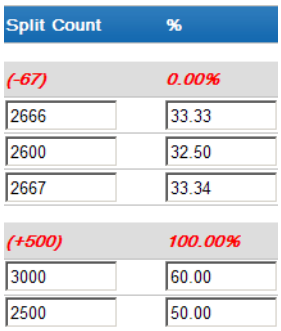


Figure 11-27: Split Counts Incorrect

d. If necessary, remove a Split by clicking the **Delete** Link for the Split.

31. Click **next**.

The Control Groups step opens.

32. Use the Radio Buttons to select the type of Control Groups:

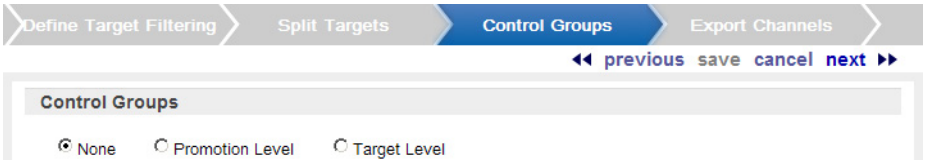


Figure 11-28: Control Groups Step

> *If* **Dynamic Targeting** *was selected for the Promotion, the Control Groups created cannot be changed. The Customers in the Control Group will remain in the Control Group throughout the Promotion.*

- **None** - **[DEFAULT]** The Promotion has no Control Group. Continue with step 33 on page 364.
- **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

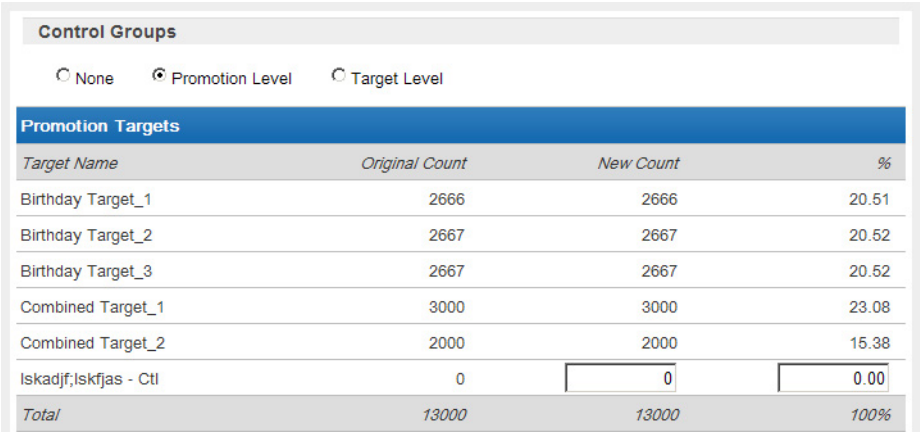


Figure 11-29: Control Group - Promotion Level

If this option is selected, determine the size of the Control Group by doing one of the following:

- In the **New Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

- **Target Level** - The Control Group Customers are pulled from each Split/Target in numbers specified individually for each Split/Target.

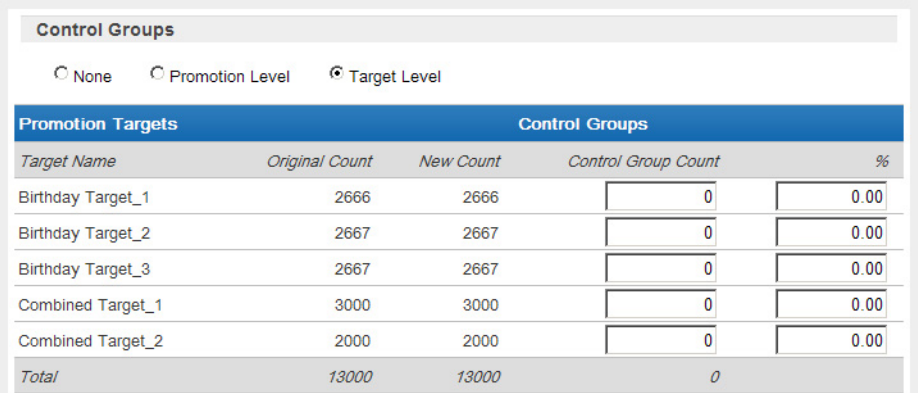


Figure 11-30: Control Group - Target Level

If this option is selected, determine the size of each Control Group by doing one of the following for each Split/Target:

- In the **Control Group Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

33. Click **next**.

The Export Channels step opens.

34. For each Split/Target, select the method used to contact the Customers in each Split/Target.

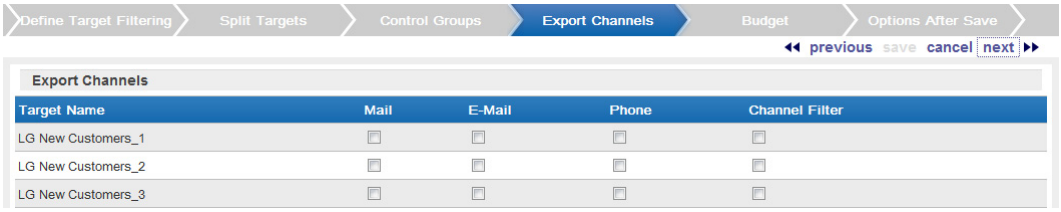


Figure 11-31: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.
- **Email** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email.
- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.
- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

If this Check Box has a checkmark (☑), Channel Filter options are displayed.

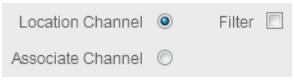


Figure 11-32: Channel Filter Options

Channel Filters have the following options:

- Radio Buttons that determine the type of Channel.

  Location Channel - Customers are contacted by the Location.

  Associate Channel - Customers are contacted by their Assigned Associates.

- **Filter** - This Check Box determines whether the export channel is filtered. If this Check Box has a checkmark (☑), additional Channel Filter options are displayed.



Figure 11-33: Filter Options

- **Max Count Per <Type>** - Determines the maximum number of target Customers that will be contacted through the channel. This field is only enabled if the **Filter** option was selected.
- **Method** - Method used to select the Customers contacted. This field is only enabled if the **Filter** option was selected. This Selection Menu has the following options:

  Random - **[DEFAULT]** Select Customers randomly.

  Top - Recent Purchase - Filter the Customers based on the most recent purchases.

  Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

  Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

- **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

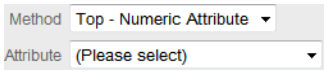


Figure 11-34: Numeric Attribute Filter

35. Click **next**.

- If the **Email** Export Channel was selected and Email Service Provider Integration is enabled in the system (see the *Relate Configuration Guide* for more information), the Email Content step opens. Continue with the next step.

- ❑ If **Include Social Listening** was selected (and the **Email** Export Channel was not), the Social Listening step opens. Continue with step 41 on page 372.
- ❑ If the **Channel Filter** Export Channel was selected (and the **Email** Export Channel and **Include Social Listening** were not), the Event Definition step opens. Continue with step 45 on page 374.
- ❑ If none of the options above were selected, the Budget step opens. Continue with step 47 on page 375.

36. Configure the Email Content.

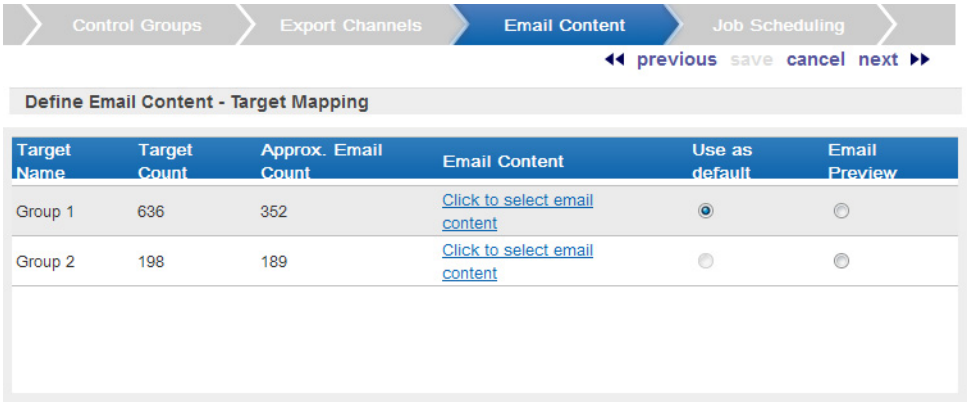


Figure 11-35: Email Content Step

a. Use the **User as Default** Radio Buttons to determine which email will be the default.

If a Customer is in more than one Group within the Promotion, that Customer will receive the email for the default Group.

b. For each Group in the Target Mapping List, click the **Click to select email content** Link to open the Email Content Template Window.



Figure 11-36: Email Content Template Window

c. Select a template in the Email Content Template Window:

1) On the left side of the Window, use the expand (⊞) buttons to find and open the proper folder for the template.

2) Click the folder where the template is located.

A List of templates opens.

Name	*Subject*	*Select*
Sample Email 1	Sample Email 1	Select template
Sample Email 2	Sample Email 2	Select template

Figure 11-37: Template List

3) Click a template to view it.

4) Click the **Select template** link to select a template and close the Email Content Template Window.

5) The template is entered in the Target Mapping List for the Group.

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	636	352	Sample Email 1	Edit	Remove	○	○
Group 2	198	189	Click to select email content			○	○

Figure 11-38: Target Mapping List - Email Template Selected

To preview an email template, use the **Email Preview** *Radio Buttons to view the templates below the Target Mapping List.*

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	1019	391	Sample Email 2	Edit	Remove	◉	◉
Group 2	1019	391	Click to select email content			○	○

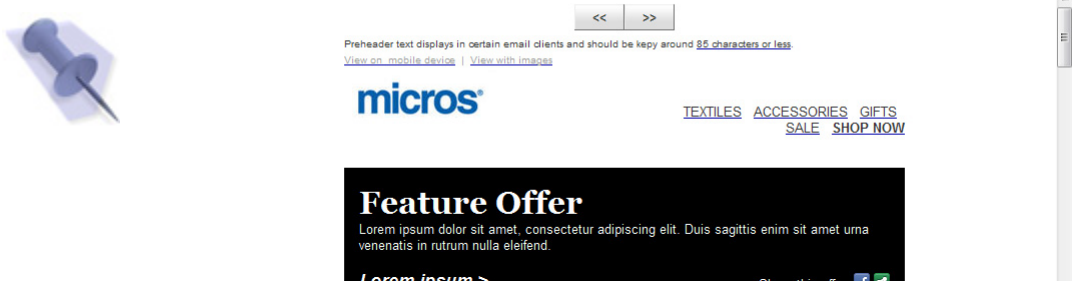


Figure 11-39: Email Preview

37. If necessary, change the email template for one or more Groups.

❑ To change the email template:

1) Click the **Edit** link.

2) Follow the procedure in step c on page 367.

- To remove a template, click the **Remove** link.

38. Configure the Email Delivery Job Schedule options in the Job Scheduling step.

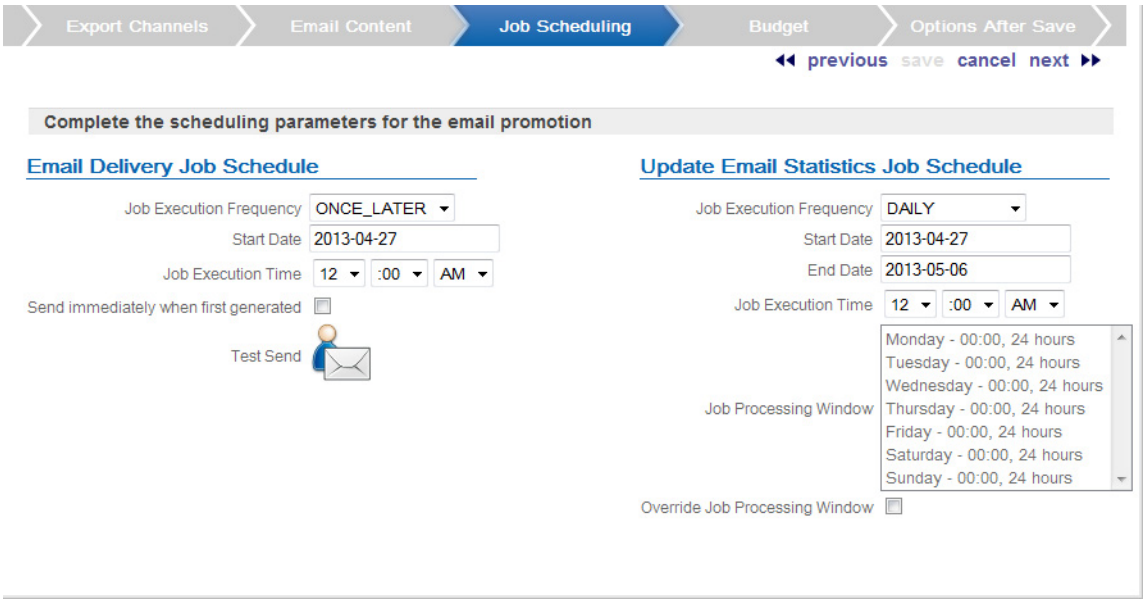


Figure 11-40: Email Delivery Step

a. Use the **Job Execution Frequency** Selection Menu to determine how often emails will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - **[DEFAULT]** Send emails for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - Send emails for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Send emails for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Send emails for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the Promotion emails will be sent:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the emails will be sent. ■ **Job Execution Time** - These Time Menus select the time at which the emails will be sent.

Query Execution Frequency	Configurations
DAILY	■ **Start Date** - This Calendar Menu selects the date on which emails will be sent. ■ **End Date** - This Calendar Menu selects the last date on which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent each day.
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Week** - This Calendar Menu determines the day of the week on which emails will be sent (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the emails will be sent.

c. Use the **Initialize when first generated** Check Box to indicate when the messages will be sent.

- **Unchecked** (☐) - **[DEFAULT]** Send messages at the indicated **Query Execution Time**.
- **Checked** (☑) - Send messages immediately upon generating the emails.

d. If necessary, do the following to send a test email message:

1) Click the **Test Send** icon ().

2) The Test Email Send Window opens.



Figure 11-41: Test Email Send Window

3) Enter each test recipient email in an **Email Addresses** Text Field (limit 3). Note that only one email address can be entered in each **Email Addresses** Text Field.

39. Configure the Update Email Statistics Job Schedule options in the Job Scheduling step.

a. Use the **Job Execution Frequency** Selection Menu to determine how often the email statistics will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - Update the statistics for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - **[DEFAULT]** Update the statistics for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Update the statistics for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Update the statistics for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the email statistics will be updated:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **Job Execution Time** - These Time Menus select the time at which the statistics will be updated.
DAILY	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last date on which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated.

Query Execution Frequency	Configurations
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Week** - This Calendar Menu determines the day of the week on which the statistics will be updated (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the statistics will be updated.

c. Use the **Override Job Processing** Check Box to determine whether the Email Statistics Job can run during a time outside the times displayed in the **Job Processing Window**.

40. Click **next**.

- ❑ If **Include Social Listening** was selected, the Social Listening step opens. Continue with step 41 on page 372.
- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with step 45 on page 374.
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with step 47 on page 375.

41. Define the keywords used by the Social Listening process:

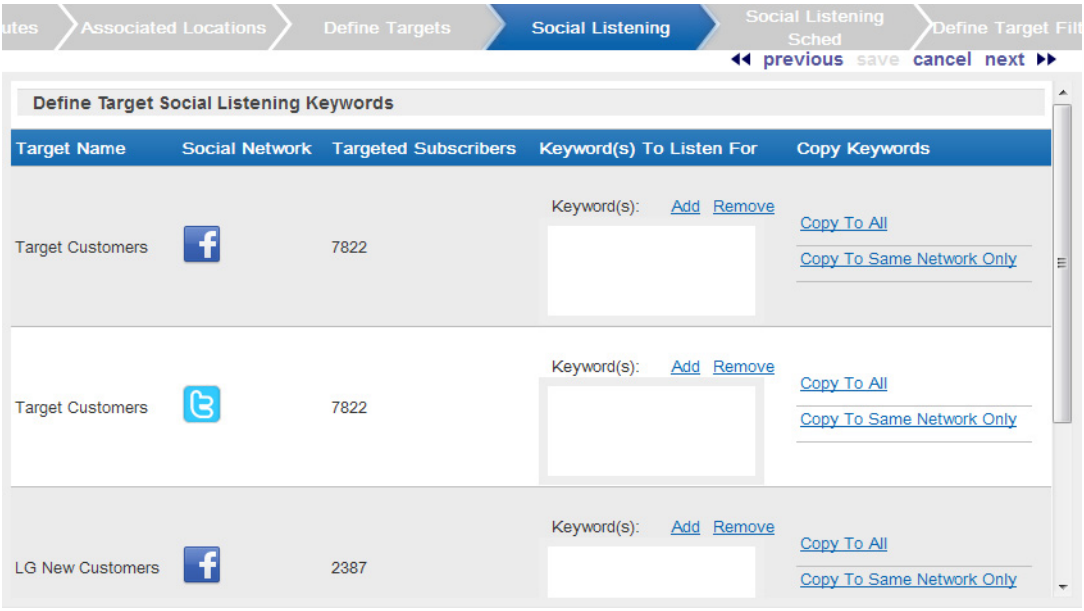


Figure 11-42: Social Listening Step

In Define Target Social Listening Keywords List, each social network configured for the system is listed once for each Target defined for the Promotion.

a. Add a keyword set to the social network for a Target:

1) Click the **Add** Link for a social network.

A Text Area Field opens.

2) Enter the keyword(s) to listen for into the Text Area Field.

3) Repeat steps 1-2 for each keyword set to enter for the social network.

b. If necessary, copy the keyword sets to other social networks:

Copying the keyword set(s) will REPLACE (rather than add to) currently configured any keyword set(s).

For example, Network 1 has the keyword set "great item" and Network 2 has the keyword sets "still shopping" and "fantastic experience at the store". The user then clicks the **Copy To All** *Link for Network 1. The only keyword set for Network 2 is now "great item".*

- Click the **Copy to Same Network Only** Link to copy the keyword set to the same social network for each Target.

  For example, if you enter "fantastic sale" in one Twitter row, clicking the **Copy to Same Network Only** Link will create a keyword set "fantastic sale" to the Twitter row for every Target.

- Click the **Copy to All** Link to copy the keyword set(s) to every social network for every Target.

c. If necessary, remove a set of keyword set from a Target's social network by clicking the Text Area Field for the keyword set, then clicking the **Remove** Link.

d. Repeat steps a-c as necessary for each Target and social network.

42. Click **next**.

The Social Listening Schedule step opens.

43. Configure the frequency at which the Job will check social media:

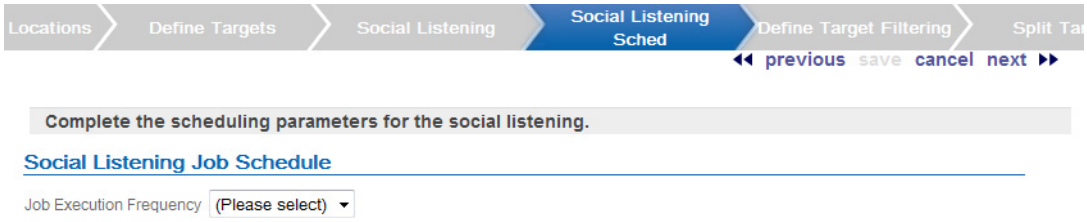


Figure 11-43: Social Listening Schedule Step

a. Select the **Job Execution Frequency** using the Selection Menu.

- **ONCE_LATER** - Run the Segment Query at a later date or time.
- **DAILY** - Run the Segment Query every day.
- **WEEKLY** - Run the Segment Query once each week.
- **MONTHLY** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **ONCE_LATER**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **DAILY**, continue with step f.
- If you selected a Job Execution Frequency of **WEEKLY**, continue with step d.
- If you selected a Job Execution Frequency of **MONTHLY**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

44. Click **next**.

- ❑ If the **Channel Filter** Export Channel was selected, the Event Definition step opens. Continue with the next step.
- ❑ If the **Channel Filter** Export Channel was not selected, the Budget step opens. Continue with step 47 on page 375.

45. Configure the Event Definition.

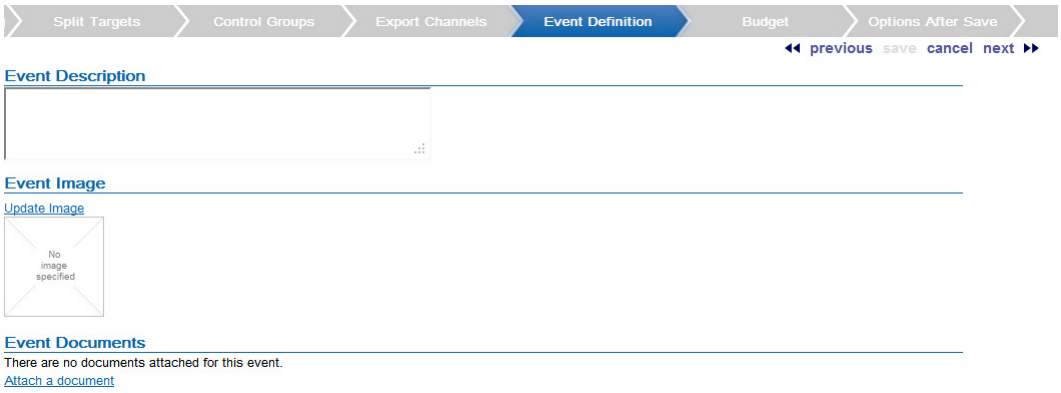


Figure 11-44: Event Definition Step

a. Enter a description of the Event in the **Event Description** field.

b. If necessary, change the image file for the Event. To change the image:

1) Click the **Update Image** Link.

The Update Image Window opens.

2) Select the **Action** using the Radio Buttons.

Select **Import Image**, to add or change the image and continue with step 3.

Select **Reset Image** to remove the image and continue with step 4.

3) Use the **File to Import** File Upload field to select the file to import.

4) Click the **Done** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

c. If necessary, attach a document to the Event. To upload a document:

1) Click the **Attach a document** Link.

The Attach a Document Window opens.

2) Use the **Please select file to Upload** File Upload field to select the file to import.

3) Click the **Upload file** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

d. To remove a document from the Event Documents List, click the **Remove** Link for the document.



Figure 11-45: Event Documents List

The document is removed from the List.

46. Click **next**.

The Budget step opens.

47. Configure the Budget for the Promotion:

a. In the Promotion Costs List, enter the costs for the Promotion that are not specific to a Target:

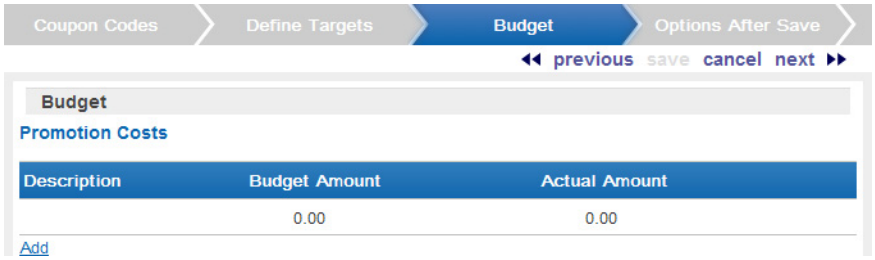


Figure 11-46: Budget Step for an Untargeted Promotion

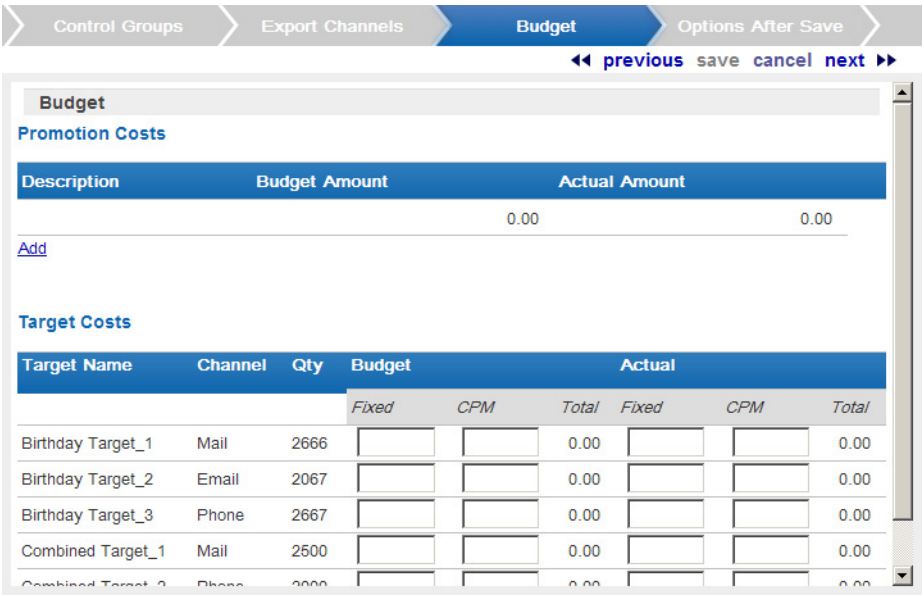


Figure 11-47: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

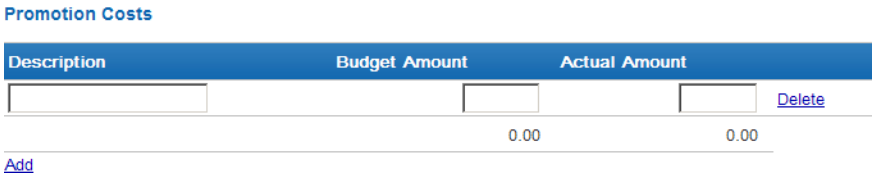


Figure 11-48: Promotion Costs

2) Enter a **Description** of the cost item.

3) Enter the budgeted amount of the item in the **Budget Amount** field.

4) Enter the actual amount of the item in the **Actual Amount** field.

5) Repeat steps 1-4 for each budget line item to add to the Promotion Costs.

6) If necessary, remove a line item by clicking its **Delete** Link.

b. If Targets are defined for the Promotion, use the Target Costs List to define the costs for each Target Channel in the Promotion:

1) In the **Budget-Fixed** field, enter the fixed cost budgeted for the Channel.

2) In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.

3) In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.

4) In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.

5) Repeat steps 1-4 for each Target Channel in the Promotion.

48. Click **next**.

The Options After Save step opens.

49. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

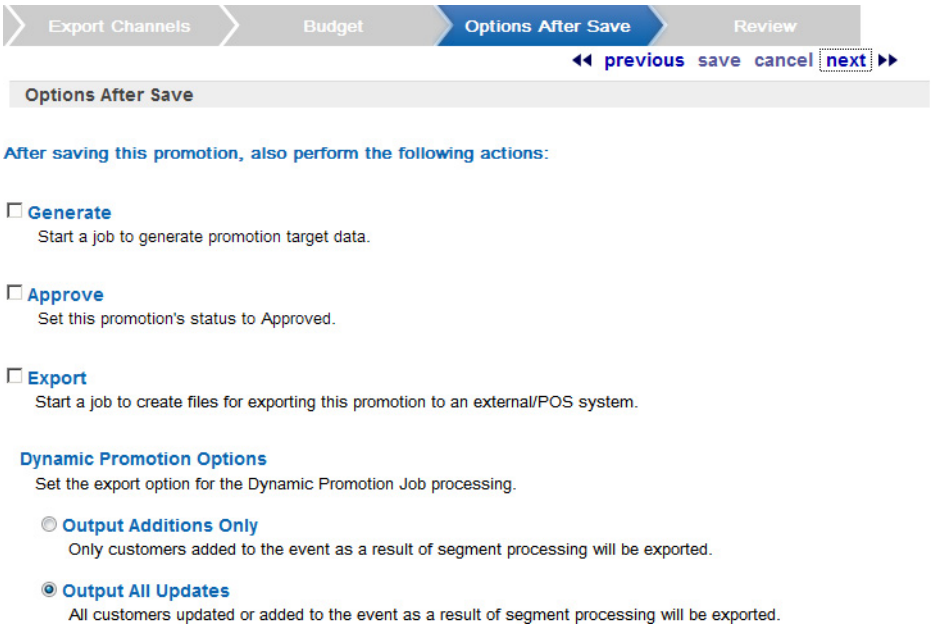


Figure 11-49: Options After Save Step

- **Generate** - Generate the Promotion Target data. This option only appears if the Promotion is targeted.
- **Approve** - Automatically approve the promotion.
- **Export** - Export the Promotion data to external systems, including POS systems.
- **Dynamic Promotion Options** - Export options for dynamic Promotions. These options only appear if the Promotion has dynamic Targets. Select the option using the Radio Buttons:
  - **Output Additions Only** - Relate will only export the Customers added to the Promotion event by the Dynamic Promotions Job.
  - **Output All Updates** - Relate will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

50. Click **next**.

The Review step opens.

51. Review the entered information to ensure that it is correct.

- Click **save** to save the Promotion with its current configuration.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to cancel the changes and return to the Promotion List without saving the Promotion.

CHAPTER 12

Create a Message Promotion

Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to **True**.

See also: The *Relate Configuration Guide* for more information.

To create a Message Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

   The New Promotion Wizard opens on the Promotion Type step.

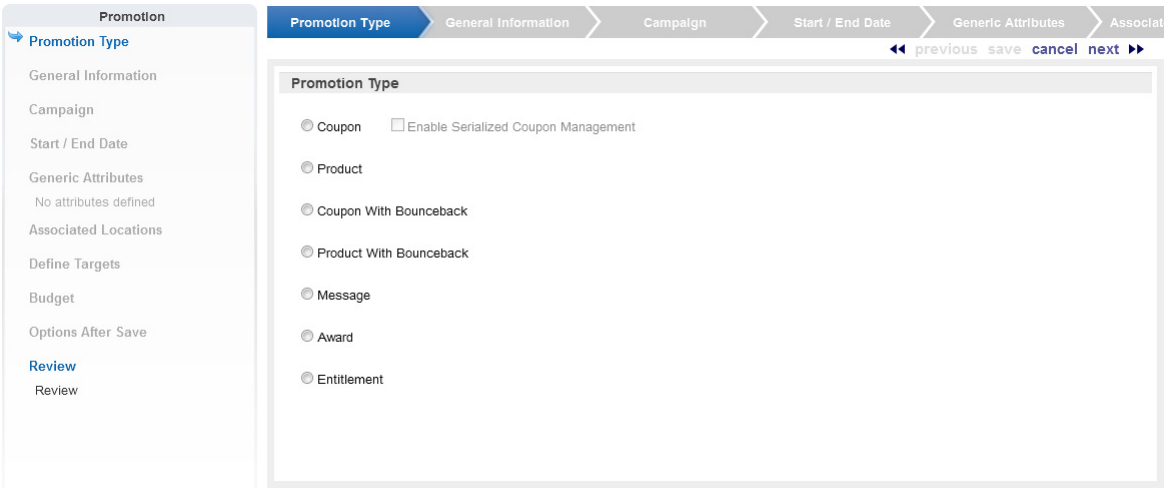


Figure 12-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Message**.
3. Click **next**.

The General Information step opens.

4. Configure the General Information for the Promotion:

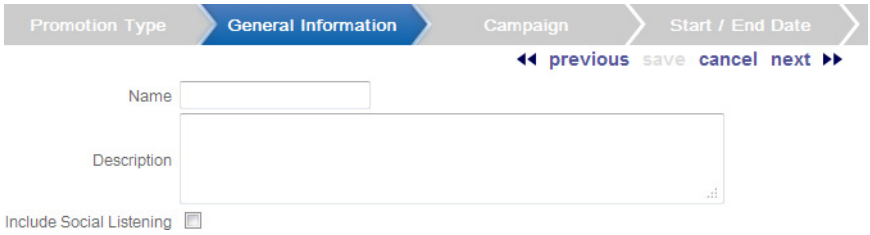


Figure 12-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.

   b. Enter a **Description** of the Promotion in the Description Text Field.

   c. Use the **Social Listening** Check Box to indicate whether social-media listening features will be enabled for the Promotion.

> *This Check Box is only available if social media access has been enabled in Conflate, and the User has been assigned the Relate_SystemAdmin and/or Relate_PromotionSocialListeningAdmin Role.*
>
> **See also:** *The* Relate Configuration Guide *for more information about Conflate, configuring social media access, and User Roles.*

5. Click **next**.

   The Campaign step opens.

6. Select how the Campaign should be associated with the Promotion:



Figure 12-3: Campaign Step

- **Auto create campaign** - Relate will automatically create a new Campaign.
- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.

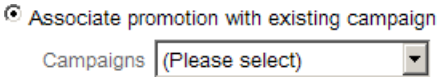


Figure 12-4: Campaigns Dropdown Menu

Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.



Figure 12-5: Create Campaign Fields

1) Enter the **Name** of the Campaign in the Name field.

2) Enter a **Description** of the Campaign in the Description field.

7. Click **next**.

The Start/End Date step opens.

8. Configure the Start and End Dates for the Promotion:



Figure 12-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date Calendar Menu.

b. Select the **Start Time** for the Promotion using the Start Time Time Menus.

c. Select the **End Date** for the Promotion using the End Date Calendar Menu.

d. Select the **End Time** for the Promotion using the End Time Time Menus.

9. Click **next**.

The Generic Attributes step opens.

10. Select or enter the configuration values for each of the **Required** Attributes.

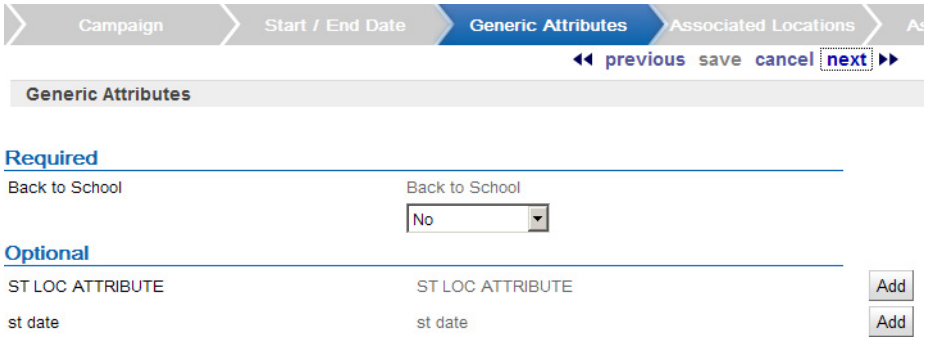


Figure 12-7: Generic Attributes Step

11. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

12. Click **next**.

The Associated Locations step opens.

13. Define the Location Eligibility Rules for the Promotion.

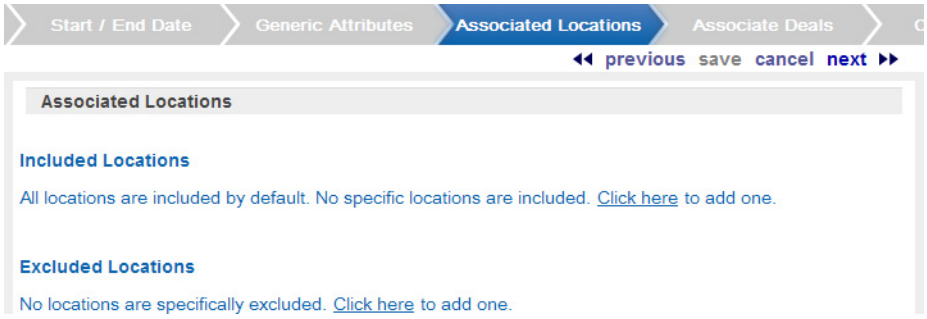


Figure 12-8: Associated Locations Step

- ❑ For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.
- ❑ For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.

14. Click **next**.

The Define Targets step opens.

15. Define the Segment Target Eligibility Rules for the Promotion:

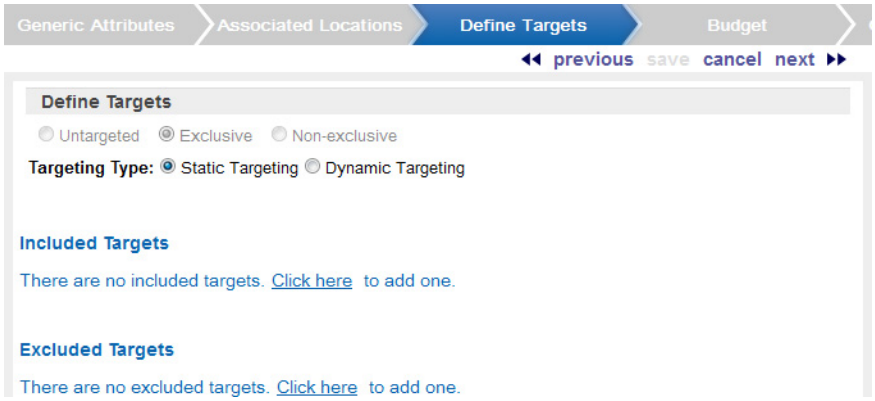


Figure 12-9: Define Targets Step

a. Targeting is automatically set to **Exclusive**.

b. The next step you perform depends upon the configuration of both your system and your User account:

- If the **Targeting Type** Radio Buttons open, continue with step c.



Figure 12-10: Targeting Type

- Otherwise, continue with step e.



The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `Relate_PromotionDynamicTargetAdmin` *or* `Relate_SystemAdmin` *Role.*

See also: The *Relate Configuration Guide* for more information about enabling software features and configuring Roles.

c. Select the **Targeting Type** for the Promotion.

- **Static Targeting** - Once the Target is created, the list of Customers in the Target will not change.

  Continue with step e.

- **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.



The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See "Dynamic Promotions" on page 666 for more information.

Dynamic Targeting Option Radio Buttons open.

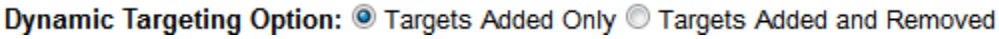


Figure 12-11: Dynamic Targeting Option

Continue with step d.

d. Select the **Dynamic Targeting Option** for the Promotion.

- **Targets Added Only** - When the Dynamic Promotions Job runs, any new Customers found that meet the Target criteria are added to the Target. All Customers currently in the Target remain in the Target.
- **Targets Added and Removed** - When the Dynamic Promotions Job runs, only the Customers who meet the Target criteria will be included in the Target. If a Customer is in the Target before the Job runs, but no longer meets the criteria, that Customer is removed from the Target.

e. Define the Segment Targets for the Promotion.

- For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.
- For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.

16. Click **next**.

- If you selected **Static Filtering** (see above), the Define Target Filtering Step opens. Continue with the next step.
- If you selected **Dynamic Targeting** (see above), the Control Groups step opens. Continue with step 22 on page 386.

17. Define the Target Filter for each Segment Target:

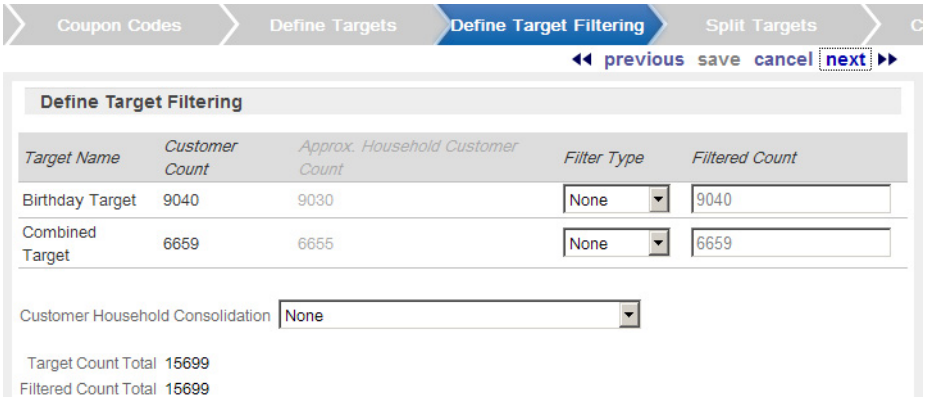


Figure 12-12: Define Target Filtering Step

a. Select the **Filter Type** for each Segment:

- **None** - **[DEFAULT]** All Customers in the Segment are eligible.
- **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.

- **Random** - Customers from the Segment will be chosen randomly for eligibility.

b. If the Filter Type for the Segment is Top Sales or Random, enter the **Filter Count** of Customers eligible for the Promotion.

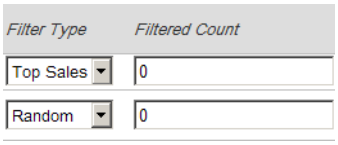


Figure 12-13: Enter Filter Count

18. Use the **Customer Household Consolidation** Selection Menu to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

This Selection Menu has the following options:

- **None** - Do not perform household filtering.
- **LT Sales** - Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** - Select head of household based on lifetime number of transactions.
- **Last Transaction Date** - Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** - Select head of household based on the Customer's numeric attributes.

19. Click **next**.

The Split Targets step opens.

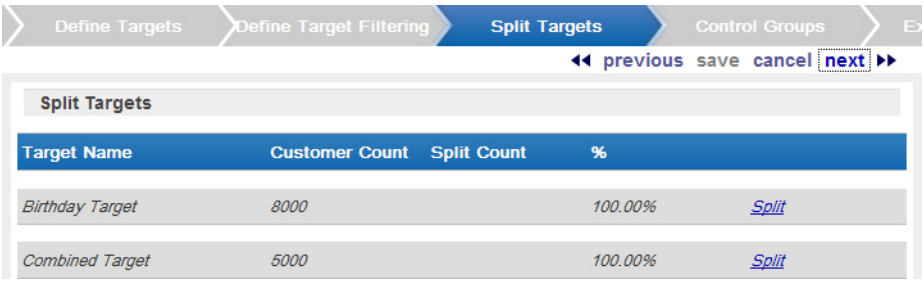


Figure 12-14: Split Targets Step

20. Filtered Targets can, optionally, be split into smaller, separate Targets. If necessary, create Splits for the filtered Targets in the Promotion:

a. Click **Split** for each Split to be created in the Target (click **Split** once for two Splits, click twice for three Splits, click three times for four Splits, etc.).

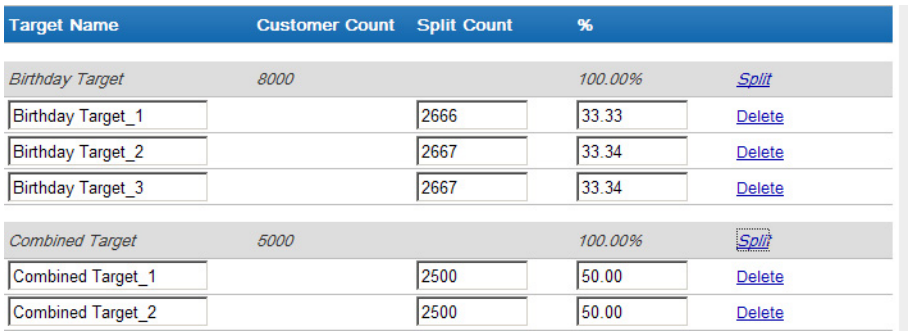


Figure 12-15: Splits

b. Optionally, change the name of the Split in the **Target Name** field for each Split.

c. Adjust the Split distribution as necessary:

- Change the number of Customers in each Split in the **Split Count** fields.
- Change the percentage of Customers in each Split in the **%** fields.

The total number of Customers in the Splits must equal the number of Customers in the target. If the numbers are not equal, Split Count will display the difference.

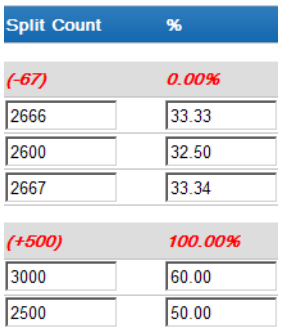


Figure 12-16: Split Counts Incorrect

d. If necessary, remove a Split by clicking the **Delete** Link for the Split.

21. Click **next**.

The Control Groups step opens.

22. Use the Radio Buttons to select the type of Control Groups:

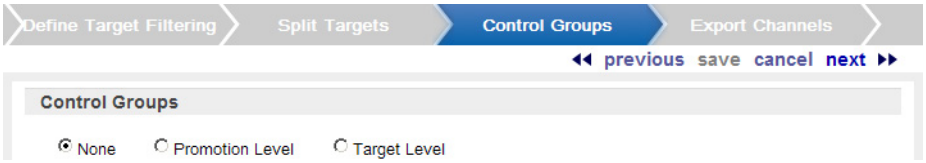


Figure 12-17: Control Groups Step

> *If* **Dynamic Targeting** *was selected for the Promotion, the Control Groups created cannot be changed. The Customers in the Control Group will remain in the Control Group throughout the Promotion.*

- **None** - **[DEFAULT]** The Promotion has no Control Group. Continue with step 23 on page 387.
- **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

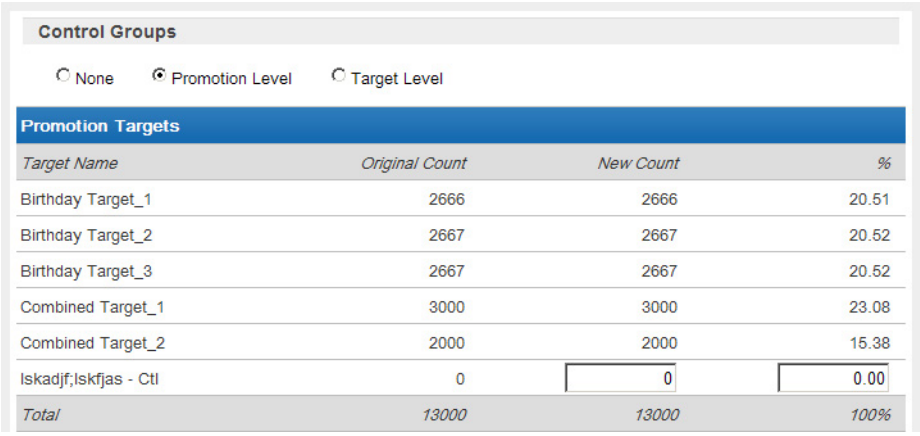


Figure 12-18: Control Group - Promotion Level

If this option is selected, determine the size of the Control Group by doing one of the following:

- In the **New Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

- **Target Level** - The Control Group Customers are pulled from each Split/Target in numbers specified individually for each Split/Target.

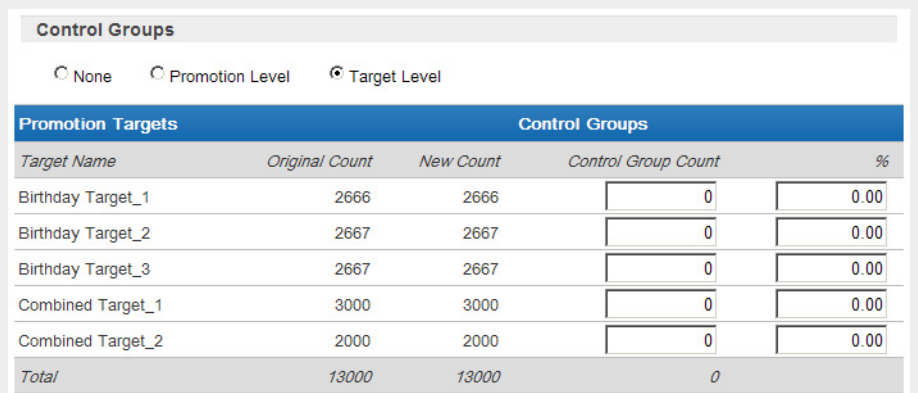


Figure 12-19: Control Group - Target Level

If this option is selected, determine the size of each Control Group by doing one of the following for each Split/Target:

- In the **Control Group Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

23. Click **next**.

The Export Channels step opens.

24. For each Split/Target, select the method used to contact the Customers in each Split/Target.

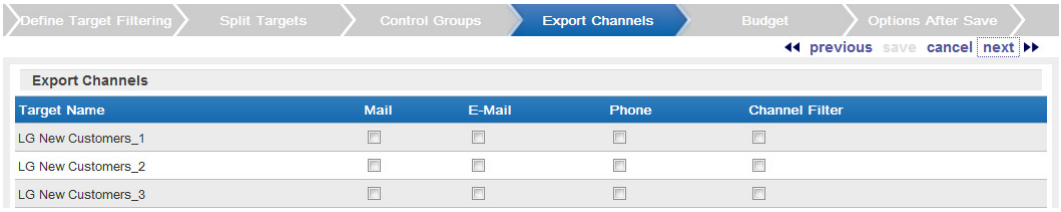


Figure 12-20: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.
- **Email** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email.
- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.
- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

If this Check Box has a checkmark (☑), Channel Filter options are displayed.

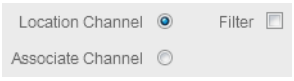


Figure 12-21: Channel Filter Options

Channel Filters have the following options:

- Radio Buttons that determine the type of Channel.

  Location Channel - Customers are contacted by the Location.

  Associate Channel - Customers are contacted by their Assigned Associates.

- **Filter** - This Check Box determines whether the export channel is filtered. If this Check Box has a checkmark (☑), additional Channel Filter options are displayed.



Figure 12-22: Filter Options

- **Max Count Per <Type>** - Determines the maximum number of target Customers that will be contacted through the channel. This field is only enabled if the **Filter** option was selected.
- **Method** - Method used to select the Customers contacted. This field is only enabled if the **Filter** option was selected. This Selection Menu has the following options:

  Random - **[DEFAULT]** Select Customers randomly.

  Top - Recent Purchase - Filter the Customers based on the most recent purchases.

  Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

  Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

- **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

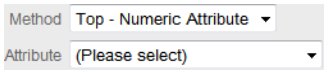


Figure 12-23: Numeric Attribute Filter

25. Click **next**.

- If the **Email** Export Channel was selected and Email Service Provider Integration is enabled in the system (see the *Relate Configuration Guide* for more information), the Email Content step opens. Continue with the next step.

- ❑ If **Include Social Listening** was selected (and the **Email** Export Channel was not), the Social Listening step opens. Continue with step 31 on page 395.
- ❑ If the **Channel Filter** Export Channel was selected (and the **Email** Export Channel and **Include Social Listening** were not), the Event Definition step opens. Continue with step 35 on page 397.
- ❑ If none of the options above were selected, the Budget step opens. Continue with step 37 on page 398.

26. Configure the Email Content.

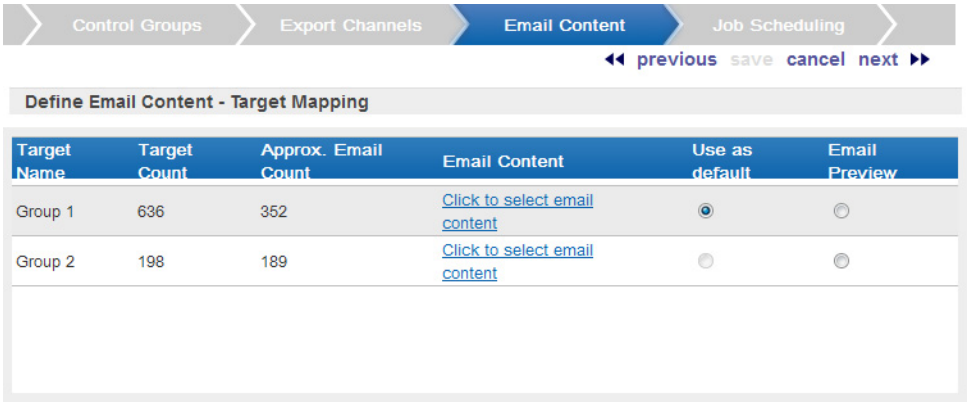


Figure 12-24: Email Content Step

a. Use the **User as Default** Radio Buttons to determine which email will be the default.

If a Customer is in more than one Group within the Promotion, that Customer will receive the email for the default Group.

b. For each Group in the Target Mapping List, click the **Click to select email content** Link to open the Email Content Template Window.



Figure 12-25: Email Content Template Window

c. Select a template in the Email Content Template Window:

1) On the left side of the Window, use the expand (⊞) buttons to find and open the proper folder for the template.

2) Click the folder where the template is located.

A List of templates opens.

Name	*Subject*	*Select*
Sample Email 1	Sample Email 1	Select template
Sample Email 2	Sample Email 2	Select template

Figure 12-26: Template List

3) Click a template to view it.

4) Click the **Select template** link to select a template and close the Email Content Template Window.

5) The template is entered in the Target Mapping List for the Group.

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	636	352	Sample Email 1	Edit	Remove	○	○
Group 2	198	189	Click to select email content			○	○

Figure 12-27: Target Mapping List - Email Template Selected

To preview an email template, use the **Email Preview** *Radio Buttons to view the templates below the Target Mapping List.*

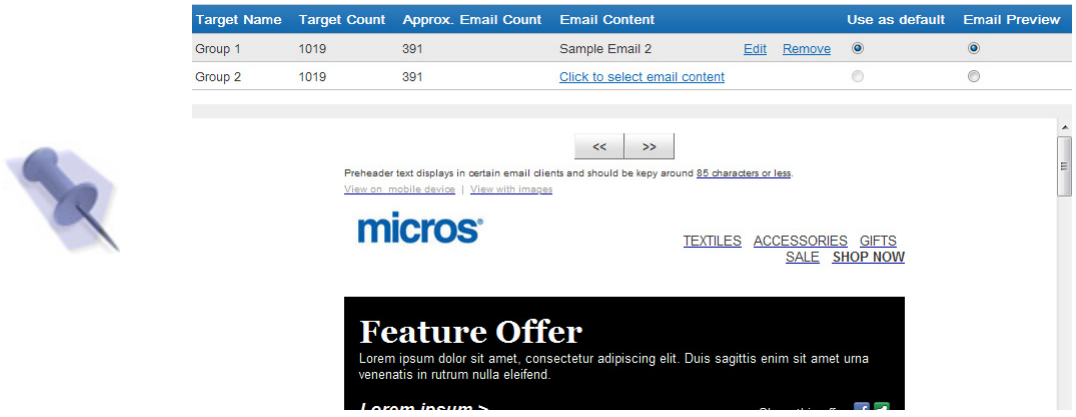


Figure 12-28: Email Preview

27. If necessary, change the email template for one or more Groups.

❑ To change the email template:

1) Click the **Edit** link.

2) Follow the procedure in step c on page 390.

- To remove a template, click the **Remove** link.

28. Configure the Email Delivery Job Schedule options in the Job Scheduling step.

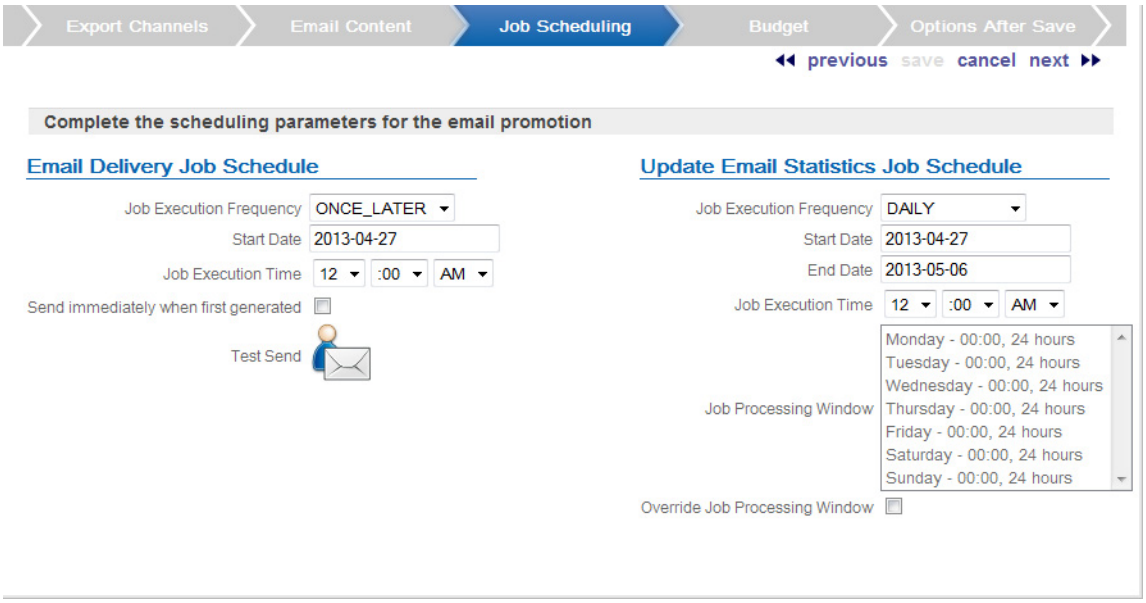


Figure 12-29: Email Delivery Step

a. Use the **Job Execution Frequency** Selection Menu to determine how often emails will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - **[DEFAULT]** Send emails for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - Send emails for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Send emails for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Send emails for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the Promotion emails will be sent:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the emails will be sent. ■ **Job Execution Time** - These Time Menus select the time at which the emails will be sent.

Query Execution Frequency	Configurations
DAILY	■ **Start Date** - This Calendar Menu selects the date on which emails will be sent. ■ **End Date** - This Calendar Menu selects the last date on which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent each day.
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Week** - This Calendar Menu determines the day of the week on which emails will be sent (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the emails will be sent.

c. Use the **Initialize when first generated** Check Box to indicate when the messages will be sent.

- **Unchecked** (☐) - **[DEFAULT]** Send messages at the indicated **Query Execution Time**.
- **Checked** (☑) - Send messages immediately upon generating the emails.

d. If necessary, do the following to send a test email message:

1) Click the **Test Send** icon ().

2) The Test Email Send Window opens.



Figure 12-30: Test Email Send Window

3) Enter each test recipient email in an **Email Addresses** Text Field (limit 3). Note that only one email address can be entered in each **Email Addresses** Text Field.

29. Configure the Update Email Statistics Job Schedule options in the Job Scheduling step.

a. Use the **Job Execution Frequency** Selection Menu to determine how often the email statistics will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - Update the statistics for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - **[DEFAULT]** Update the statistics for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Update the statistics for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Update the statistics for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the email statistics will be updated:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **Job Execution Time** - These Time Menus select the time at which the statistics will be updated.
DAILY	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last date on which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated.

Query Execution Frequency	Configurations
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Week** - This Calendar Menu determines the day of the week on which the statistics will be updated (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the statistics will be updated.

c. Use the **Override Job Processing** Check Box to determine whether the Email Statistics Job can run during a time outside the times displayed in the **Job Processing Window**.

30. Click **next**.

- ❑ If **Include Social Listening** was selected, the Social Listening step opens. Continue with step 31 on page 395.
- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with step 35 on page 397.
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with step 37 on page 398.

31. Define the keywords used by the Social Listening process:

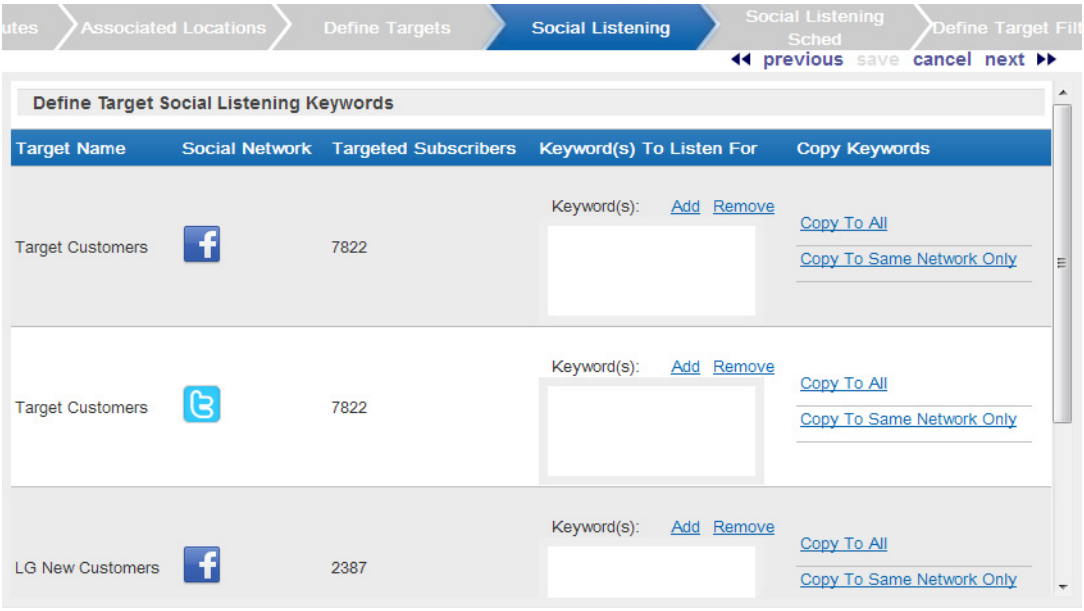


Figure 12-31: Social Listening Step

In Define Target Social Listening Keywords List, each social network configured for the system is listed once for each Target defined for the Promotion.

a. Add a keyword set to the social network for a Target:

1) Click the **Add** Link for a social network.

A Text Area Field opens.

2) Enter the keyword(s) to listen for into the Text Area Field.

3) Repeat steps 1-2 for each keyword set to enter for the social network.

b. If necessary, copy the keyword sets to other social networks:

> *Copying the keyword set(s) will REPLACE (rather than add to) currently configured any keyword set(s).*
>
> *For example, Network 1 has the keyword set "great item" and Network 2 has the keyword sets "still shopping" and "fantastic experience at the store". The user then clicks the* **Copy To All** *Link for Network 1. The only keyword set for Network 2 is now "great item".*

- Click the **Copy to Same Network Only** Link to copy the keyword set to the same social network for each Target.

  For example, if you enter "fantastic sale" in one Twitter row, clicking the **Copy to Same Network Only** Link will create a keyword set "fantastic sale" to the Twitter row for every Target.

- Click the **Copy to All** Link to copy the keyword set(s) to every social network for every Target.

c. If necessary, remove a set of keyword set from a Target's social network by clicking the Text Area Field for the keyword set, then clicking the **Remove** Link.

d. Repeat steps a-c as necessary for each Target and social network.

32. Click **next**.

The Social Listening Schedule step opens.

33. Configure the frequency at which the Job will check social media:

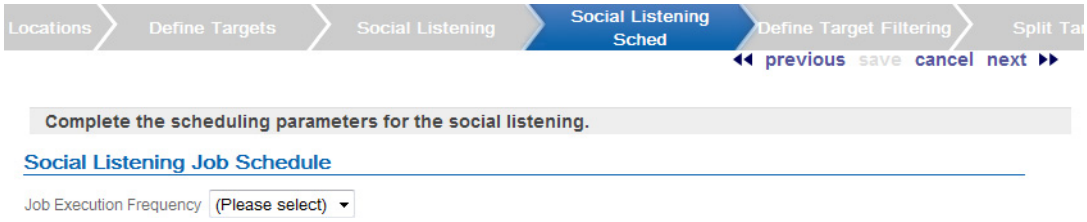


Figure 12-32: Social Listening Schedule Step

a. Select the **Job Execution Frequency** using the Selection Menu.

- **ONCE_LATER** - Run the Segment Query at a later date or time.
- **DAILY** - Run the Segment Query every day.
- **WEEKLY** - Run the Segment Query once each week.
- **MONTHLY** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **ONCE_LATER**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **DAILY**, continue with step f.
- If you selected a Job Execution Frequency of **WEEKLY**, continue with step d.
- If you selected a Job Execution Frequency of **MONTHLY**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

34. Click **next**.

- ❑ If the **Channel Filter** Export Channel was selected, the Event Definition step opens. Continue with the next step.
- ❑ If the **Channel Filter** Export Channel was not selected, the Budget step opens. Continue with step 37 on page 398.

35. Configure the Event Definition.

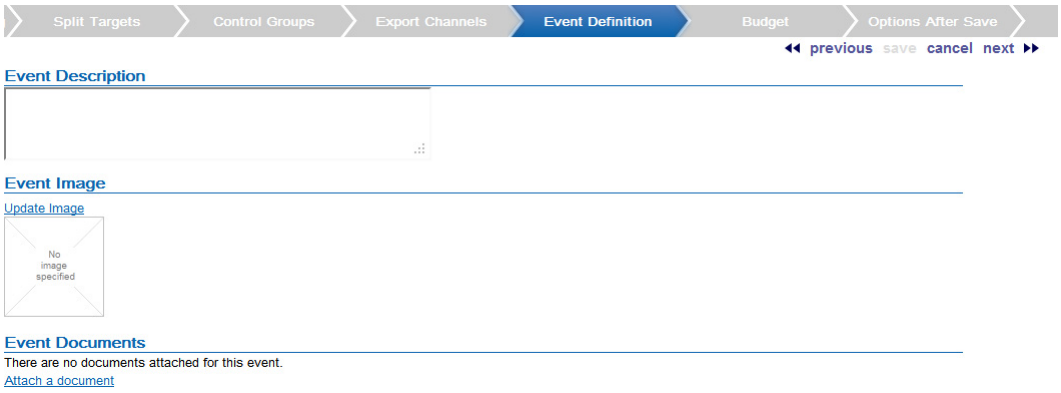


Figure 12-33: Event Definition Step

a. Enter a description of the Event in the **Event Description** field.

b. If necessary, change the image file for the Event. To change the image:

1) Click the **Update Image** Link.

The Update Image Window opens.

2) Select the **Action** using the Radio Buttons.

Select **Import Image**, to add or change the image and continue with step 3.

Select **Reset Image** to remove the image and continue with step 4.

3) Use the **File to Import** File Upload field to select the file to import.

4) Click the **Done** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

c. If necessary, attach a document to the Event. To upload a document:

1) Click the **Attach a document** Link.

The Attach a Document Window opens.

2) Use the **Please select file to Upload** File Upload field to select the file to import.

3) Click the **Upload file** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

d. To remove a document from the Event Documents List, click the **Remove** Link for the document.



Figure 12-34: Event Documents List

The document is removed from the List.

36. Click **next**.

The Budget step opens.

37. Configure the Budget for the Promotion:

a. In the Promotion Costs List, enter the costs for the Promotion that are not specific to a Target:

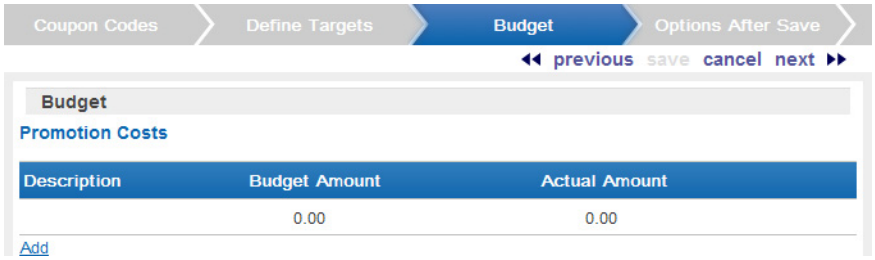


Figure 12-35: Budget Step for an Untargeted Promotion

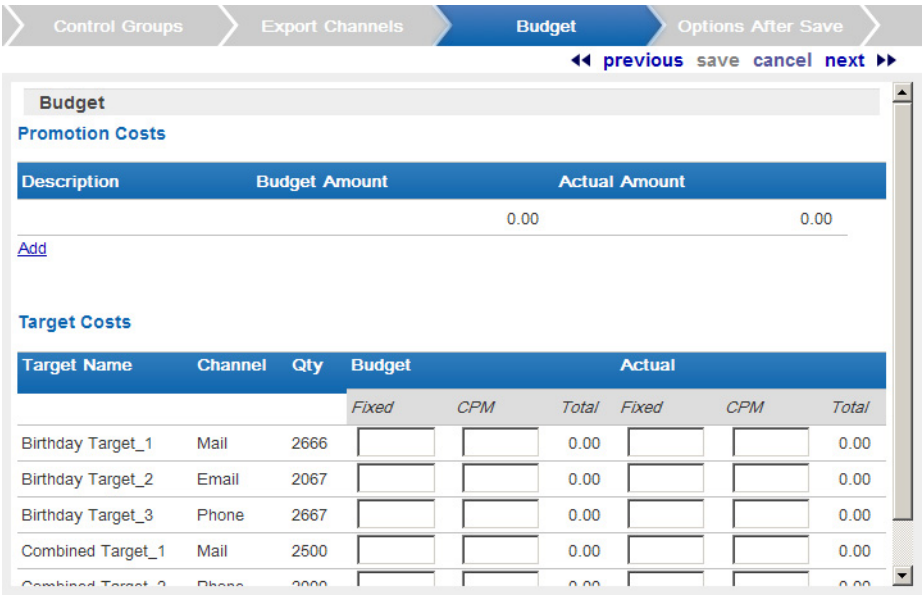


Figure 12-36: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

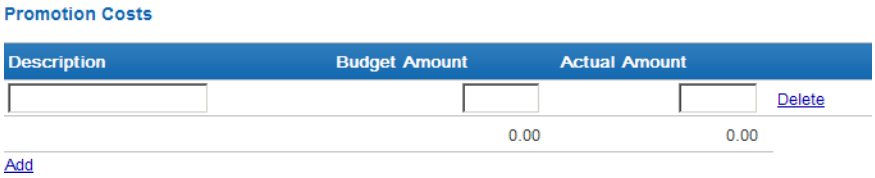


Figure 12-37: Promotion Costs

2) Enter a **Description** of the cost item.

3) Enter the budgeted amount of the item in the **Budget Amount** field.

4) Enter the actual amount of the item in the **Actual Amount** field.

5) Repeat steps 1-4 for each budget line item to add to the Promotion Costs.

6) If necessary, remove a line item by clicking its **Delete** Link.

b. If Targets are defined for the Promotion, use the Target Costs List to define the costs for each Target Channel in the Promotion:

1) In the **Budget-Fixed** field, enter the fixed cost budgeted for the Channel.

2) In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.

3) In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.

4) In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.

5) Repeat steps 1-4 for each Target Channel in the Promotion.

38. Click **next**.

The Options After Save step opens.

39. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

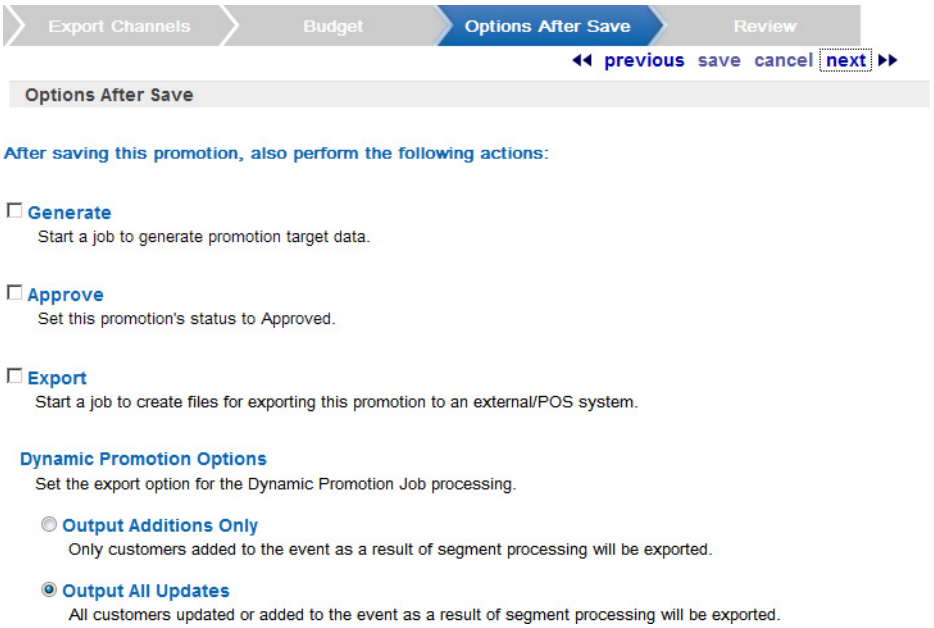


Figure 12-38: Options After Save Step

- **Generate** - Generate the Promotion Target data. This option only appears if the Promotion is targeted.
- **Approve** - Automatically approve the promotion.
- **Export** - Export the Promotion data to external systems, including POS systems.
- **Dynamic Promotion Options** - Export options for dynamic Promotions. These options only appear if the Promotion has dynamic Targets. Select the option using the Radio Buttons:
  - **Output Additions Only** - Relate will only export the Customers added to the Promotion event by the Dynamic Promotions Job.
  - **Output All Updates** - Relate will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

40. Click **next**.

The Review step opens.

41. Review the entered information to ensure that it is correct.

- Click **save** to save the Promotion with its current configuration.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to cancel the changes and return to the Promotion List without saving the Promotion.

CHAPTER 13

Create an Award Promotion



Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to **True***.*

See also: The *Relate Configuration Guide* for more information.

Customers can only be added to Award Promotions that use Dynamic Targeting. They can only be added to an Award Promotion if they have been assigned a Card that is part of the Promotion, and they are part of a Segment assigned to the Promotion.

To add a Customer to an Award Promotion, use the following rules:

- ❑ Assign the Customer a Card that is part of the Promotion (if the Customer does not already have one).
- ❑ Add the Customer to a Segment included in the Award Promotion (e.g. through a web service).



The next time the Dynamic Promotions Job runs, the Customer will be enrolled in the program, they will receive an Award certificate, and their purchases will be tracked going forward.

If an individual Customer is added to an Award promotion through a web service, that Customer will NOT be automatically enrolled in the program, they will NOT receive an Award certificate, and they will NOT have their purchases tracked within the Promotion event.

See also: The *Relate Batch Processing & Web Services Guide* for more information about web services.

To create an Award Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

   The New Promotion Wizard opens on the Promotion Type step.

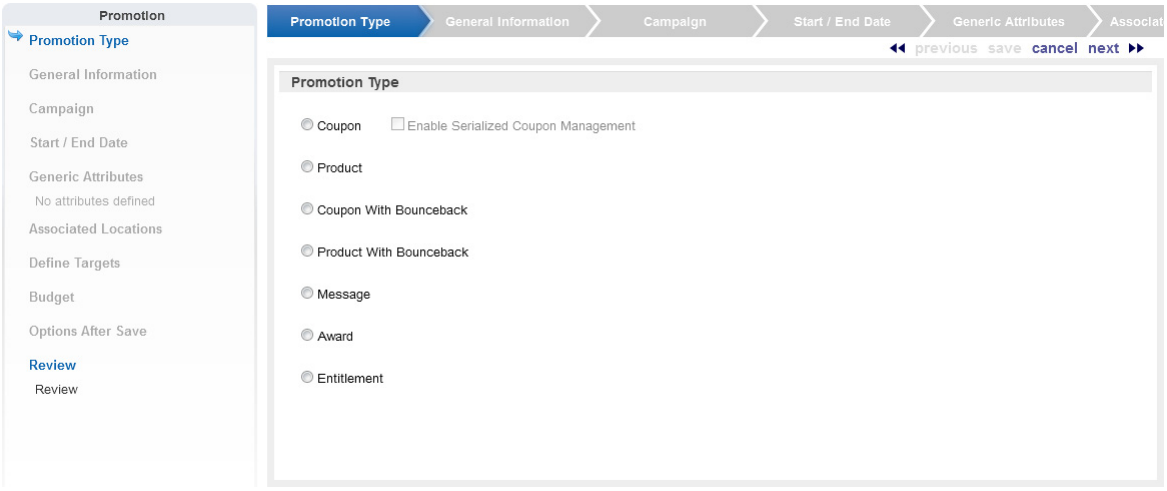


Figure 13-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Award**.
3. Click **next**.

   The General Information step opens.
4. Configure the General Information for the Promotion:

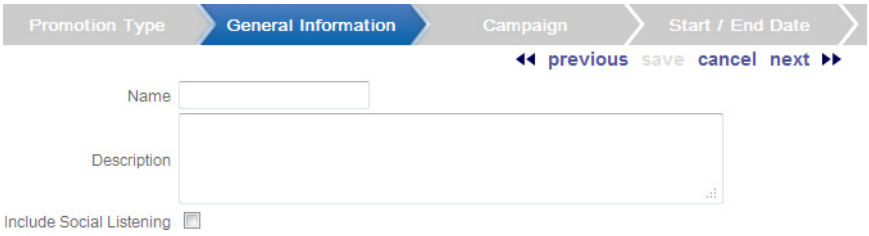


Figure 13-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.
   b. Enter a **Description** of the Promotion in the Description Text Field.

c. Use the **Social Listening** Check Box to indicate whether social-media listening features will be enabled for the Promotion.

> *This Check Box is only available if social media access has been enabled in Conflate, and the User has been assigned the Relate_SystemAdmin and/or Relate_PromotionSocialListeningAdmin Role.*
>
> **See also:** *The* Relate Configuration Guide *for more information about Conflate, configuring social media access, and User Roles.*

5. Click **next**.

The Campaign step opens.

6. Select how the Campaign should be associated with the Promotion:



Figure 13-3: Campaign Step

- **Auto create campaign** - Relate will automatically create a new Campaign.
- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.

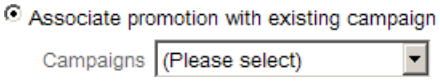


Figure 13-4: Campaigns Dropdown Menu

  Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.



Figure 13-5: Create Campaign Fields

1) Enter the **Name** of the Campaign in the Name field.

2) Enter a **Description** of the Campaign in the Description field.

7. Click **next**.

The Start/End Date step opens.

8. Configure the Start and End Dates for the Promotion:

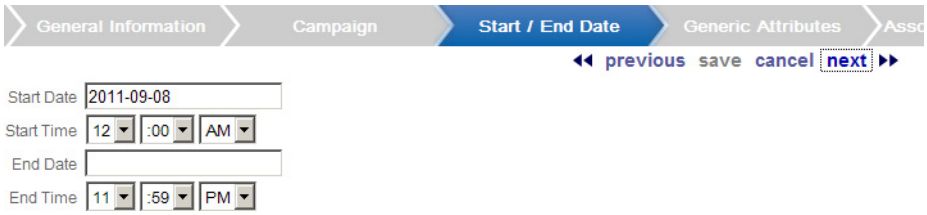


Figure 13-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date Calendar Menu.

b. Select the **Start Time** for the Promotion using the Start Time Time Menus.

c. Select the **End Date** for the Promotion using the End Date Calendar Menu.

d. Select the **End Time** for the Promotion using the End Time Time Menus.

9. Click **next**.

The Award Certificate step opens.

10. Configure the Award Certificate:

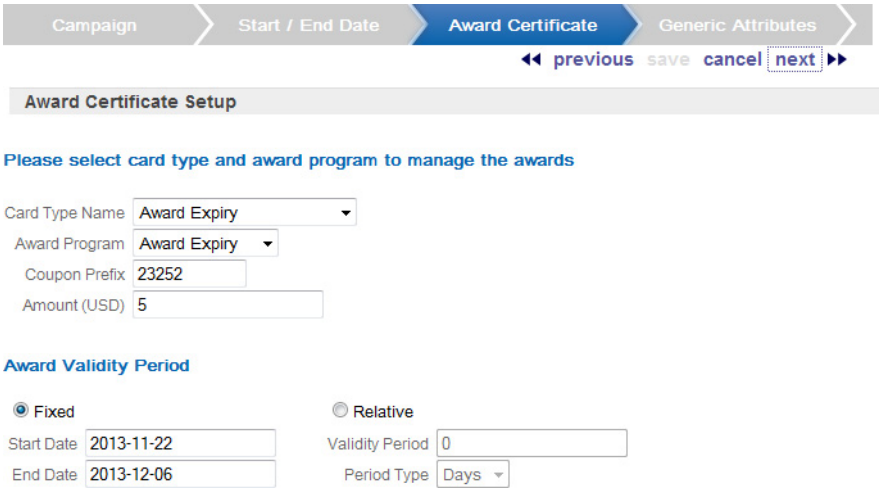


Figure 13-7: Award Certificate Step

a. Use the **Card Type Name** Selection Menu to select the type of Card receiving the award.

The Award Program Selection Menu is populated.

b. Use the **Award Program** Selection Menu to select the Award Program associated with the Card.

c. Enter a **Coupon Prefix** in the Text Field.

d. Enter the **Amount** of the award certificate in the Text Field.

- If the amount entered is too close the configured maximum Award amount, Relate will display a warning message:



Figure 13-8: Award Amount Warning

- If the amount entered is greater than the configured maximum Award amount, Relate will display an error message and will not allow you to move to the next step.



Figure 13-9: Award Amount Error

See also: The *Relate Configuration Guide* for more information about configuring the maximum Award amount.

11. Use the **Award Validity Period** Radio Buttons to select the method used to determine how long the award certificate is valid:

- **Fixed** - The award certificate is valid between specified dates.

  After selecting this option, configure the following fields:

  - **Start Date** - The date on which the award certificate is first valid.
  - **End Date** - The last date on which the award certificate is valid.

- **Relative** - The award certificate is valid for a period of time after it is issued.

  After selecting this option, configure the following fields:

  - **Validity Period** - Period during which the award certificate is valid. The type of period is determined by the Period Type configuration.
  - **Period Type** - Units of time used to determine the validity period. Currently, this Selection Menu can only be set to **Days**.

12. Click **next**.

The Generic Attributes step opens.

13. Select or enter the configuration values for each of the **Required** Attributes.

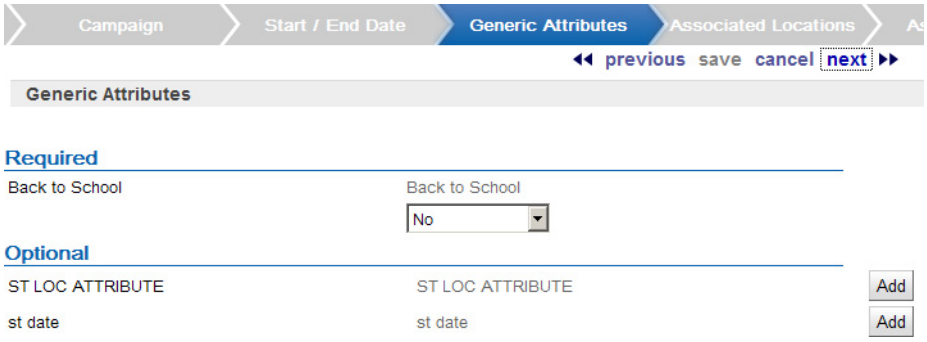


Figure 13-10: Generic Attributes Step

14. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

15. Click **next**.

The Define Targets step opens.

16. Define the Segment Target Eligibility Rules for the Promotion:

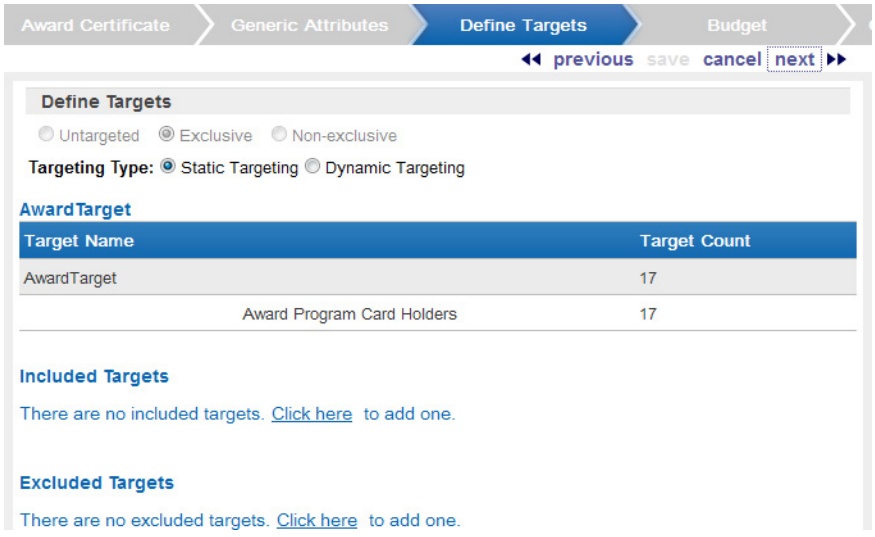


Figure 13-11: Define Targets Step

a. Targeting is automatically set to **Exclusive**.

b. The next step you perform depends upon the configuration of both your system and your User account:

- If the **Targeting Type** Radio Buttons open, continue with step c.

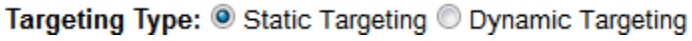


Figure 13-12: Targeting Type

- Otherwise, continue with step e.



The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `Relate_PromotionDynamicTargetAdmin` *or* `Relate_SystemAdmin` *Role.*

See also: The *Relate Configuration Guide* for more information about enabling software features and configuring Roles.

c. Select the **Targeting Type** for the Promotion.

- **Static Targeting** - Once the Target is created, the list of Customers in the Target will not change.

  Continue with step e.

- **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.



The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See "Dynamic Promotions" on page 666 for more information.

Dynamic Targeting Option Radio Buttons open.

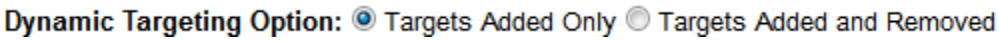


Figure 13-13: Dynamic Targeting Option

Continue with step d.

d. Select the **Dynamic Targeting Option** for the Promotion.

- **Targets Added Only** - When the Dynamic Promotions Job runs, any new Customers found that meet the Target criteria are added to the Target. All Customers currently in the Target remain in the Target.
- **Targets Added and Removed** - When the Dynamic Promotions Job runs, only the Customers who meet the Target criteria will be included in the Target. If a Customer is in the Target before the Job runs, but no longer meets the criteria, that Customer is removed from the Target.

e. Define the Segment Targets for the Promotion.

- For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.
- For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.

- *The Promotion will only include those Customers who both hold the defined Card with the selected Award program, and meet the criteria of the configured Segment Eligibility Rules.*
- *The Target Count cannot be zero. If the Target Count is zero, Relate will display an error message and the User will not be able to move to the next step.*



Figure 13-14: Award Target with Count of Zero

17. Click **next**.

- If you selected **Static Filtering** (see above), the Define Target Filtering Step opens. Continue with the next step.
- If you selected **Dynamic Targeting** (see above), the Control Groups step opens. Continue with step 23 on page 411.

18. Define the Target Filter for each Segment Target:

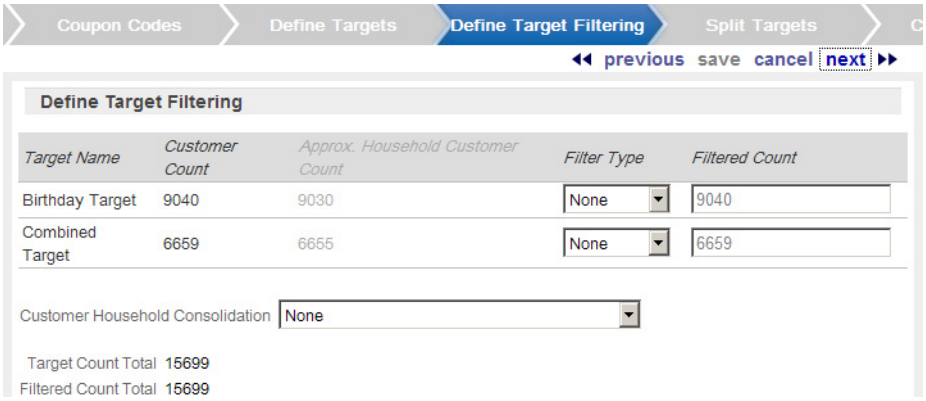


Figure 13-15: Define Target Filtering Step

a. Select the **Filter Type** for each Segment:

- **None** - **[DEFAULT]** All Customers in the Segment are eligible.
- **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.
- **Random** - Customers from the Segment will be chosen randomly for eligibility.

b. If the Filter Type for the Segment is Top Sales or Random, enter the **Filter Count** of Customers eligible for the Promotion.

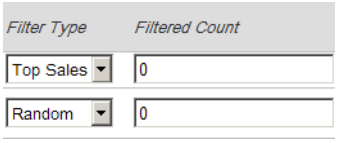


Figure 13-16: Enter Filter Count

19. Use the **Customer Household Consolidation** Selection Menu to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

This Selection Menu has the following options:

- **None** - Do not perform household filtering.
- **LT Sales** - Select head of household based on amount purchased over the lifetime of their account.
- **LT Transaction Count** - Select head of household based on lifetime number of transactions.
- **Last Transaction Date** - Select head of household based on the Customer who performed the most recent transaction.
- **Customer Attributes** - Select head of household based on the Customer's numeric attributes.

20. Click **next**.

The Split Targets step opens.

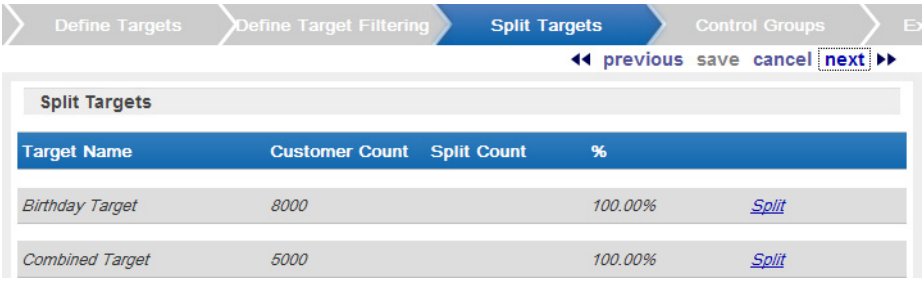


Figure 13-17: Split Targets Step

21. Filtered Targets can, optionally, be split into smaller, separate Targets. If necessary, create Splits for the filtered Targets in the Promotion:

a. Click **Split** for each Split to be created in the Target (click **Split** once for two Splits, click twice for three Splits, click three times for four Splits, etc.).

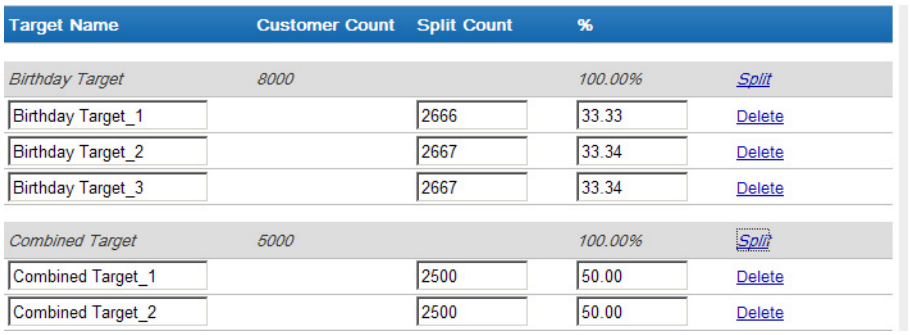


Figure 13-18: Splits

b. Optionally, change the name of the Split in the **Target Name** field for each Split.

c. Adjust the Split distribution as necessary:

- Change the number of Customers in each Split in the **Split Count** fields.
- Change the percentage of Customers in each Split in the **%** fields.

The total number of Customers in the Splits must equal the number of Customers in the target. If the numbers are not equal, Split Count will display the difference.

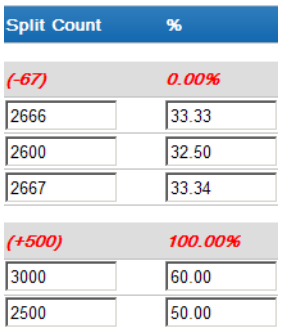


Figure 13-19: Split Counts Incorrect

d. If necessary, remove a Split by clicking the **Delete** Link for the Split.

22. Click **next**.

The Control Groups step opens.

23. Use the Radio Buttons to select the type of Control Groups:

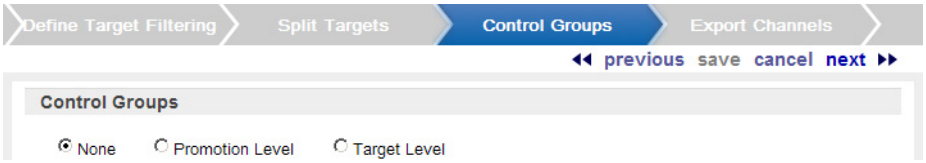


Figure 13-20: Control Groups Step

> *If* **Dynamic Targeting** *was selected for the Promotion, the Control Groups created cannot be changed. The Customers in the Control Group will remain in the Control Group throughout the Promotion.*

- **None** - **[DEFAULT]** The Promotion has no Control Group. Continue with step 24 on page 412.
- **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

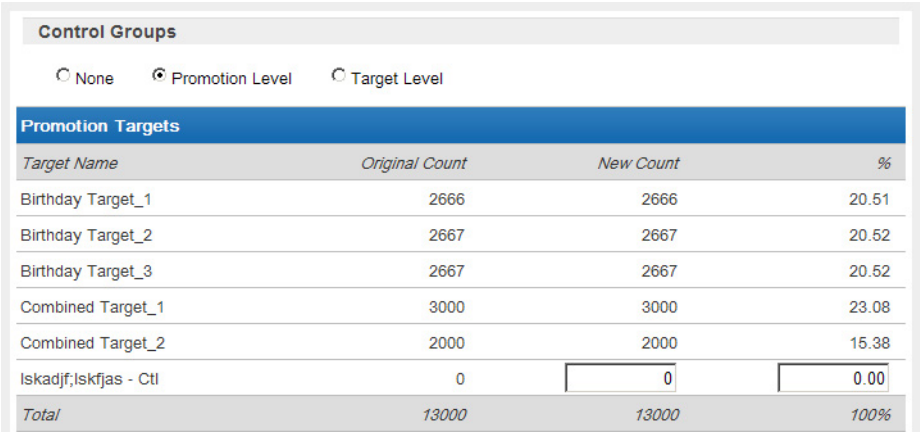


Figure 13-21: Control Group - Promotion Level

If this option is selected, determine the size of the Control Group by doing one of the following:

- In the **New Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

- **Target Level** - The Control Group Customers are pulled from each Split/Target in numbers specified individually for each Split/Target.

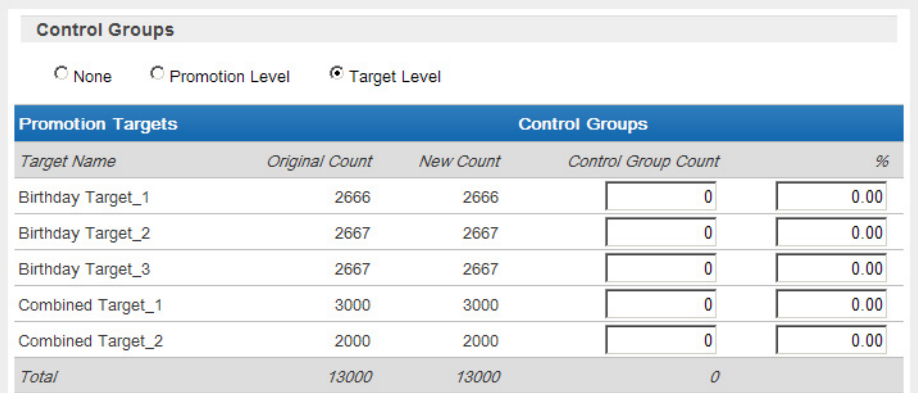


Figure 13-22: Control Group - Target Level

If this option is selected, determine the size of each Control Group by doing one of the following for each Split/Target:

- In the **Control Group Count** field, enter the number of Customers in the Control Group.
- In the **%** field, enter the percentage of the Customers in the Control Group.

24. Click **next**.

The Export Channels step opens.

25. For each Split/Target, select the method used to contact the Customers in each Split/Target.

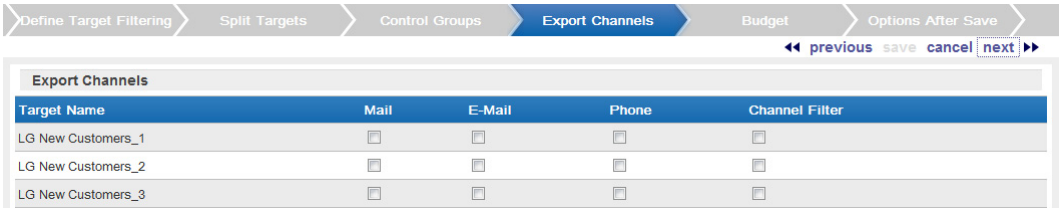


Figure 13-23: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.
- **Email** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email.
- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.
- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

If this Check Box has a checkmark (☑), Channel Filter options are displayed.

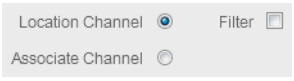


Figure 13-24: Channel Filter Options

Channel Filters have the following options:

- Radio Buttons that determine the type of Channel.

  Location Channel - Customers are contacted by the Location.

  Associate Channel - Customers are contacted by their Assigned Associates.

- **Filter** - This Check Box determines whether the export channel is filtered. If this Check Box has a checkmark (☑), additional Channel Filter options are displayed.



Figure 13-25: Filter Options

- **Max Count Per <Type>** - Determines the maximum number of target Customers that will be contacted through the channel. This field is only enabled if the **Filter** option was selected.
- **Method** - Method used to select the Customers contacted. This field is only enabled if the **Filter** option was selected. This Selection Menu has the following options:

  Random - **[DEFAULT]** Select Customers randomly.

  Top - Recent Purchase - Filter the Customers based on the most recent purchases.

  Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

  Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

- **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

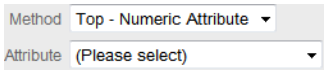


Figure 13-26: Numeric Attribute Filter

26. Click **next**.

- If the **Email** Export Channel was selected and Email Service Provider Integration is enabled in the system (see the *Relate Configuration Guide* for more information), the Email Content step opens. Continue with the next step.

- ❑ If **Include Social Listening** was selected (and the **Email** Export Channel was not), the Social Listening step opens. Continue with step 32 on page 420.
- ❑ If the **Channel Filter** Export Channel was selected (and the **Email** Export Channel and **Include Social Listening** were not), the Event Definition step opens. Continue with step 36 on page 422.
- ❑ If none of the options above were selected, the Budget step opens. Continue with step 38 on page 423.

27. Configure the Email Content.

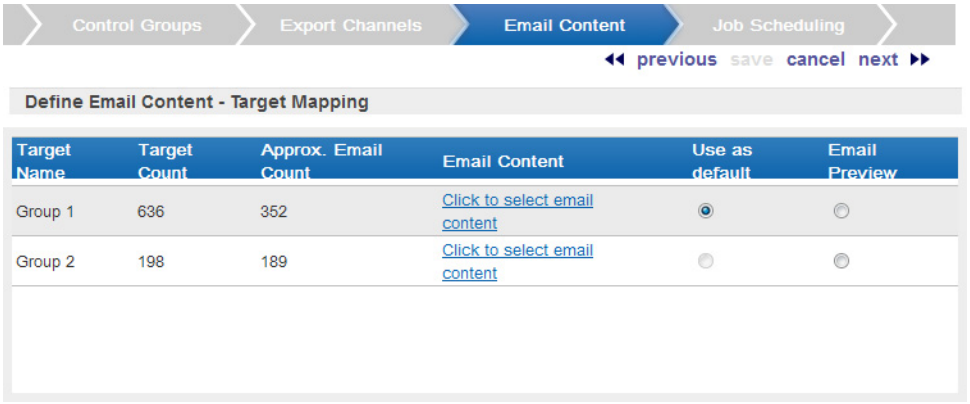


Figure 13-27: Email Content Step

a. Use the **User as Default** Radio Buttons to determine which email will be the default.

If a Customer is in more than one Group within the Promotion, that Customer will receive the email for the default Group.

b. For each Group in the Target Mapping List, click the **Click to select email content** Link to open the Email Content Template Window.



Figure 13-28: Email Content Template Window

c. Select a template in the Email Content Template Window:

1) On the left side of the Window, use the expand (⊞) buttons to find and open the proper folder for the template.

2) Click the folder where the template is located.

A List of templates opens.

Name	*Subject*	*Select*
Sample Email 1	Sample Email 1	Select template
Sample Email 2	Sample Email 2	Select template

Figure 13-29: Template List

3) Click a template to view it.

4) Click the **Select template** link to select a template and close the Email Content Template Window.

5) The template is entered in the Target Mapping List for the Group.

Target Name	Target Count	Approx. Email Count	Email Content			Use as default	Email Preview
Group 1	636	352	Sample Email 1	Edit	Remove	○	○
Group 2	198	189	Click to select email content			○	○

Figure 13-30: Target Mapping List - Email Template Selected

To preview an email template, use the **Email Preview** *Radio Buttons to view the templates below the Target Mapping List.*

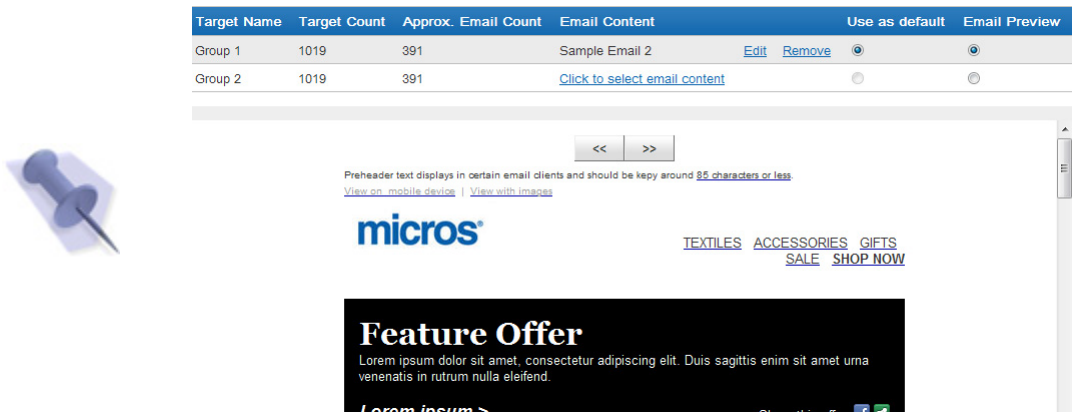


Figure 13-31: Email Preview

28. If necessary, change the email template for one or more Groups.

❑ To change the email template:

1) Click the **Edit** link.

2) Follow the procedure in step c on page 415.

- To remove a template, click the **Remove** link.

29. Configure the Email Delivery Job Schedule options in the Job Scheduling step.

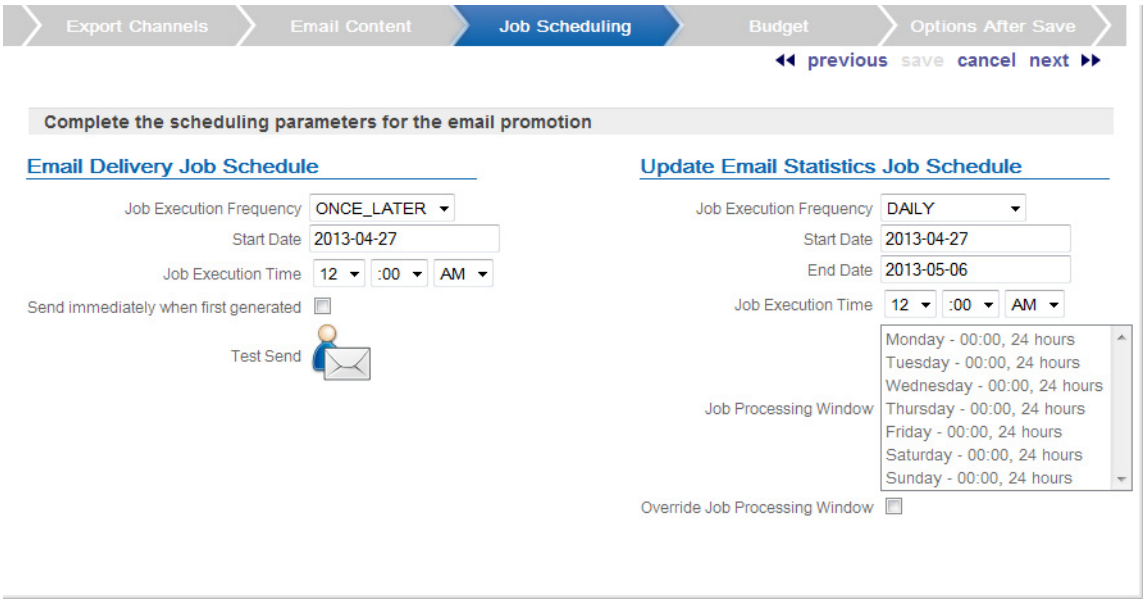


Figure 13-32: Email Delivery Step

a. Use the **Job Execution Frequency** Selection Menu to determine how often emails will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - **[DEFAULT]** Send emails for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - Send emails for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Send emails for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Send emails for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the Promotion emails will be sent:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the emails will be sent. ■ **Job Execution Time** - These Time Menus select the time at which the emails will be sent.

Query Execution Frequency	Configurations
DAILY	■ **Start Date** - This Calendar Menu selects the date on which emails will be sent. ■ **End Date** - This Calendar Menu selects the last date on which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent each day.
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Week** - This Calendar Menu determines the day of the week on which emails will be sent (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which emails will be sent. ■ **End Date** - This Calendar Menu selects the last day of the range in which emails will be sent. ■ **Query Execution Time** - These Time Menus select the time at which the emails will be sent. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the emails will be sent.

c. Use the **Initialize when first generated** Check Box to indicate when the messages will be sent.

- **Unchecked** (☐) - **[DEFAULT]** Send messages at the indicated **Query Execution Time**.
- **Checked** (☑) - Send messages immediately upon generating the emails.

d. If necessary, do the following to send a test email message:

1) Click the **Test Send** icon ().

2) The Test Email Send Window opens.



Figure 13-33: Test Email Send Window

3) Enter each test recipient email in an **Email Addresses** Text Field (limit 3). Note that only one email address can be entered in each **Email Addresses** Text Field.

30. Configure the Update Email Statistics Job Schedule options in the Job Scheduling step.

a. Use the **Job Execution Frequency** Selection Menu to determine how often the email statistics will be sent. This Selection Menu has the following options:

- **ONCE_LATER** - Update the statistics for the Promotion only once, at a defined time in the future. Continue with step b.
- **DAILY** - **[DEFAULT]** Update the statistics for the Promotion every day during a defined period of time. Continue with step b.
- **WEEKLY** - Update the statistics for the Promotion once each week during a defined period of time. Continue with step b.
- **MONTHLY** - Update the statistics for the Promotion once each month during a defined period of time. Continue with step b.

b. Define the time at which the email statistics will be updated:

Query Execution Frequency	Configurations
ONCE_LATER	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **Job Execution Time** - These Time Menus select the time at which the statistics will be updated.
DAILY	■ **Start Date** - This Calendar Menu selects the date on which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last date on which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated.

Query Execution Frequency	Configurations
WEEKLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Week** - This Calendar Menu determines the day of the week on which the statistics will be updated (**1**=Sunday, **2**=Monday, **3**=Tuesday, **4**=Wednesday, **5**=Thursday, **6**=Friday, **7**=Saturday).
MONTHLY	■ **Start Date** - This Calendar Menu selects the first day of the range in which the statistics will be updated. ■ **End Date** - This Calendar Menu selects the last day of the range in which the statistics will be updated. ■ **Query Execution Time** - These Time Menus select the time at which the statistics will be updated. ■ **Day of Month** - This Calendar Menu determines the day of the month on which the statistics will be updated.

c. Use the **Override Job Processing** Check Box to determine whether the Email Statistics Job can run during a time outside the times displayed in the **Job Processing Window**.

31. Click **next**.

- ❑ If **Include Social Listening** was selected, the Social Listening step opens. Continue with step 32 on page 420.
- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with step 36 on page 422.
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with step 38 on page 423.

32. Define the keywords used by the Social Listening process:

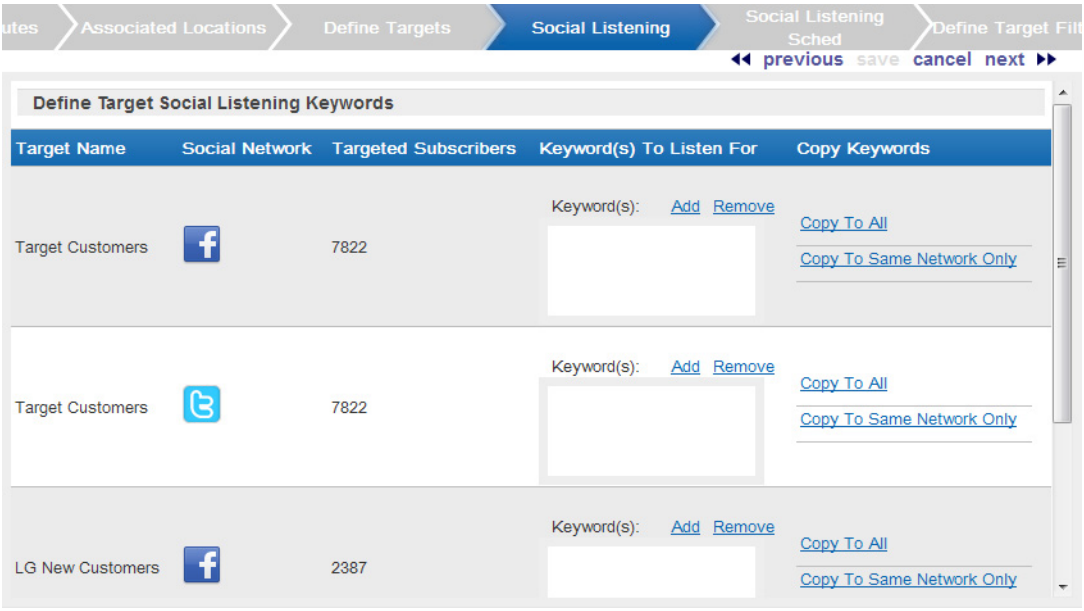


Figure 13-34: Social Listening Step

In Define Target Social Listening Keywords List, each social network configured for the system is listed once for each Target defined for the Promotion.

a. Add a keyword set to the social network for a Target:

1) Click the **Add** Link for a social network.

A Text Area Field opens.

2) Enter the keyword(s) to listen for into the Text Area Field.

3) Repeat steps 1-2 for each keyword set to enter for the social network.

b. If necessary, copy the keyword sets to other social networks:

> *Copying the keyword set(s) will REPLACE (rather than add to) currently configured any keyword set(s).*
>
> *For example, Network 1 has the keyword set "great item" and Network 2 has the keyword sets "still shopping" and "fantastic experience at the store". The user then clicks the* **Copy To All** *Link for Network 1. The only keyword set for Network 2 is now "great item".*

- Click the **Copy to Same Network Only** Link to copy the keyword set to the same social network for each Target.

  For example, if you enter "fantastic sale" in one Twitter row, clicking the **Copy to Same Network Only** Link will create a keyword set "fantastic sale" to the Twitter row for every Target.

- Click the **Copy to All** Link to copy the keyword set(s) to every social network for every Target.

c. If necessary, remove a set of keyword set from a Target's social network by clicking the Text Area Field for the keyword set, then clicking the **Remove** Link.

d. Repeat steps a-c as necessary for each Target and social network.

33. Click **next**.

The Social Listening Schedule step opens.

34. Configure the frequency at which the Job will check social media:

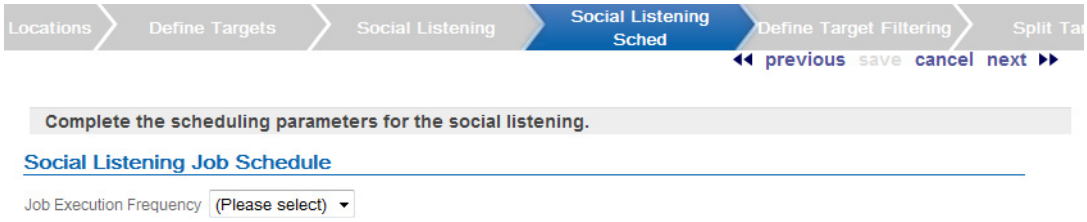


Figure 13-35: Social Listening Schedule Step

a. Select the **Job Execution Frequency** using the Selection Menu.

- **ONCE_LATER** - Run the Segment Query at a later date or time.
- **DAILY** - Run the Segment Query every day.
- **WEEKLY** - Run the Segment Query once each week.
- **MONTHLY** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **ONCE_LATER**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **DAILY**, continue with step f.
- If you selected a Job Execution Frequency of **WEEKLY**, continue with step d.
- If you selected a Job Execution Frequency of **MONTHLY**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

35. Click **next**.

- ❑ If the **Channel Filter** Export Channel was selected, the Event Definition step opens. Continue with the next step.
- ❑ If the **Channel Filter** Export Channel was not selected, the Budget step opens. Continue with step 38 on page 423.

36. Configure the Event Definition.

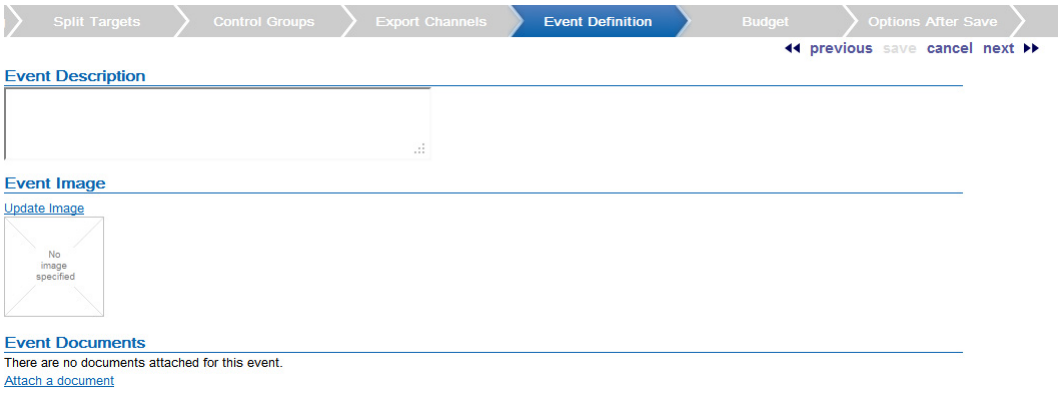


Figure 13-36: Event Definition Step

a. Enter a description of the Event in the **Event Description** field.

b. If necessary, change the image file for the Event. To change the image:

1) Click the **Update Image** Link.

The Update Image Window opens.

2) Select the **Action** using the Radio Buttons.

Select **Import Image**, to add or change the image and continue with step 3.

Select **Reset Image** to remove the image and continue with step 4.

3) Use the **File to Import** File Upload field to select the file to import.

4) Click the **Done** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

c. If necessary, attach a document to the Event. To upload a document:

1) Click the **Attach a document** Link.

The Attach a Document Window opens.

2) Use the **Please select file to Upload** File Upload field to select the file to import.

3) Click the **Upload file** button to save the changes and close the Window.

To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

d. To remove a document from the Event Documents List, click the **Remove** Link for the document.



Figure 13-37: Event Documents List

The document is removed from the List.

37. Click **next**.

The Budget step opens.

38. Configure the Budget for the Promotion:

a. In the Promotion Costs List, enter the costs for the Promotion that are not specific to a Target:

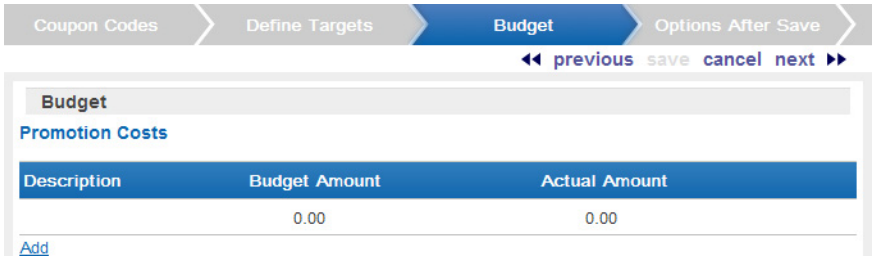


Figure 13-38: Budget Step for an Untargeted Promotion

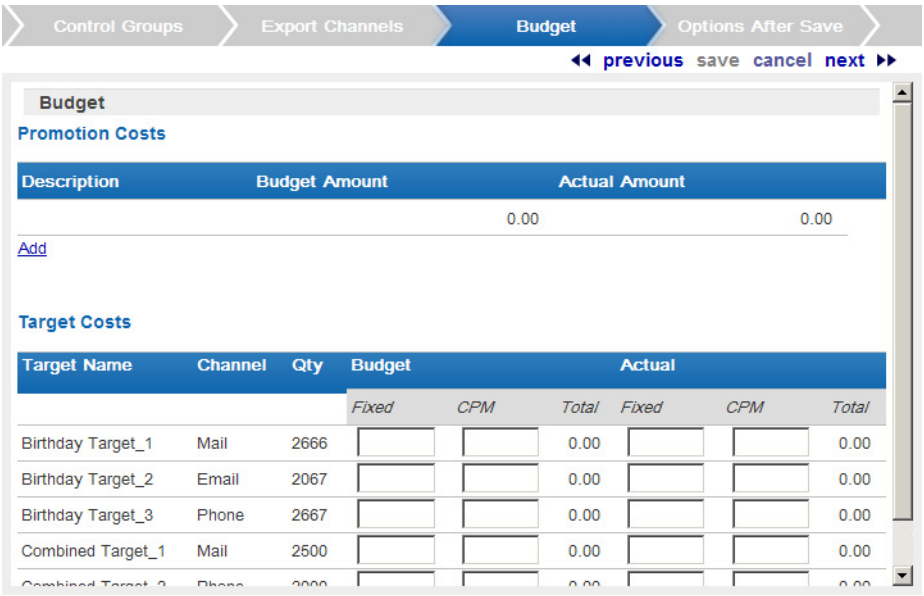


Figure 13-39: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

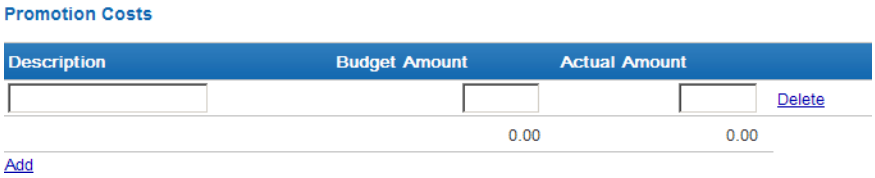


Figure 13-40: Promotion Costs

2) Enter a **Description** of the cost item.

3) Enter the budgeted amount of the item in the **Budget Amount** field.

4) Enter the actual amount of the item in the **Actual Amount** field.

5) Repeat steps 1-4 for each budget line item to add to the Promotion Costs.

6) If necessary, remove a line item by clicking its **Delete** Link.

b. If Targets are defined for the Promotion, use the Target Costs List to define the costs for each Target Channel in the Promotion:

1) In the **Budget-Fixed** field, enter the fixed cost budgeted for the Channel.

2) In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.

3) In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.

4) In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.

5) Repeat steps 1-4 for each Target Channel in the Promotion.

39. Click **next**.

The Options After Save step opens.

40. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

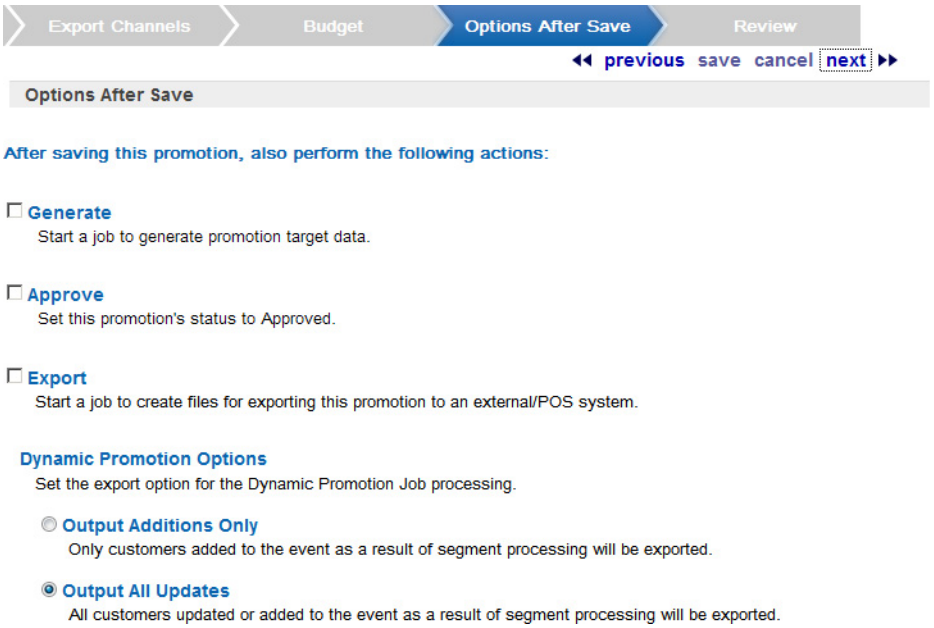


Figure 13-41: Options After Save Step

- **Generate** - Generate the Promotion Target data. This option only appears if the Promotion is targeted.
- **Approve** - Automatically approve the promotion.
- **Export** - Export the Promotion data to external systems, including POS systems.
- **Dynamic Promotion Options** - Export options for dynamic Promotions. These options only appear if the Promotion has dynamic Targets. Select the option using the Radio Buttons:
  - **Output Additions Only** - Relate will only export the Customers added to the Promotion event by the Dynamic Promotions Job.
  - **Output All Updates** - Relate will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

41. Click **next**.

The Review step opens.

42. Review the entered information to ensure that it is correct.

- Click **save** to save the Promotion with its current configuration.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to cancel the changes and return to the Promotion List without saving the Promotion.

CHAPTER 14

Create an Entitlement Promotion

> *Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to* **True**.
>
> **See also:** The *Relate Configuration Guide* for more information.

To create an Entitlement Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

   The New Promotion Wizard opens on the Promotion Type step.

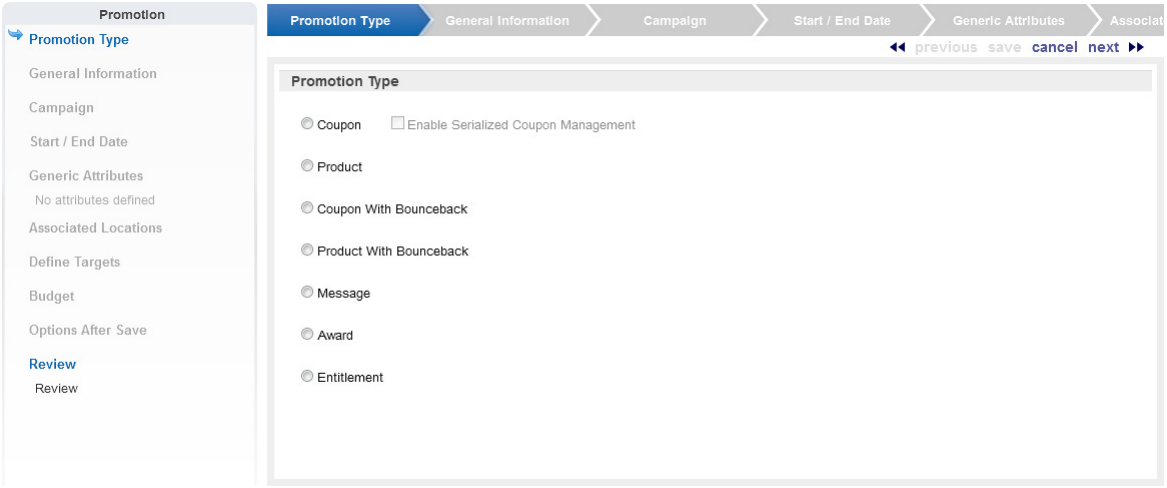


Figure 14-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Entitlement**.
3. Click **next**.

The General Information step opens.

4. Configure the General Information for the Promotion:

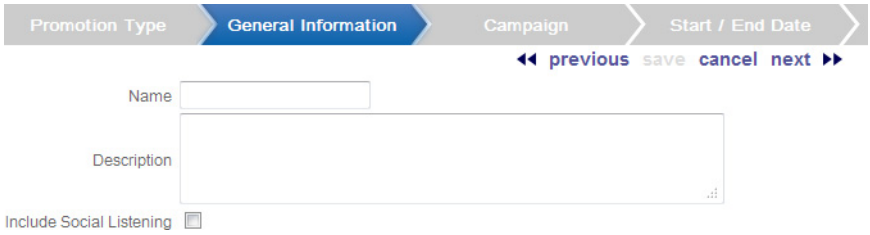


Figure 14-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.

   b. Enter a **Description** of the Promotion in the Description Text Field.

   c. Use the **Social Listening** Check Box to indicate whether social-media listening features will be enabled for the Promotion.

> *This Check Box is only available if social media access has been enabled in Conflate, and the User has been assigned the Relate_SystemAdmin and/or Relate_PromotionSocialListeningAdmin Role.*
>
> **See also:** *The* Relate Configuration Guide *for more information about Conflate, configuring social media access, and User Roles.*

5. Click **next**.

   The Campaign step opens.

6. Select how the Campaign should be associated with the Promotion:



Figure 14-3: Campaign Step

- **Auto create campaign** - Relate will automatically create a new Campaign.
- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.

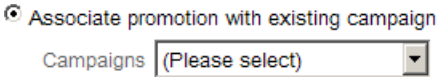


Figure 14-4: Campaigns Dropdown Menu

Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.



Figure 14-5: Create Campaign Fields

1) Enter the **Name** of the Campaign in the Name field.

2) Enter a **Description** of the Campaign in the Description field.

7. Click **next**.

The Start/End Date step opens.

8. Configure the Start and End Dates for the Promotion:

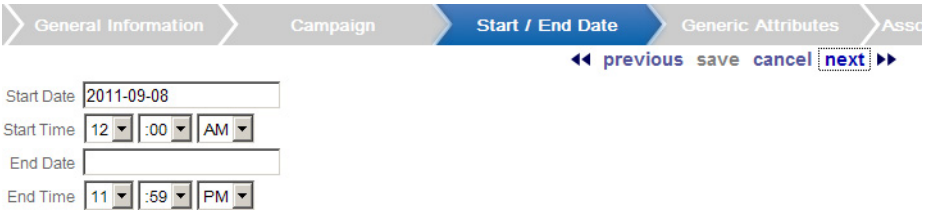


Figure 14-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date Calendar Menu.

b. Select the **Start Time** for the Promotion using the Start Time Time Menus.

c. Select the **End Date** for the Promotion using the End Date Calendar Menu.

d. Select the **End Time** for the Promotion using the End Time Time Menus.

9. Click **next**.

The Entitlement step opens.

10. Configure the Entitlement:

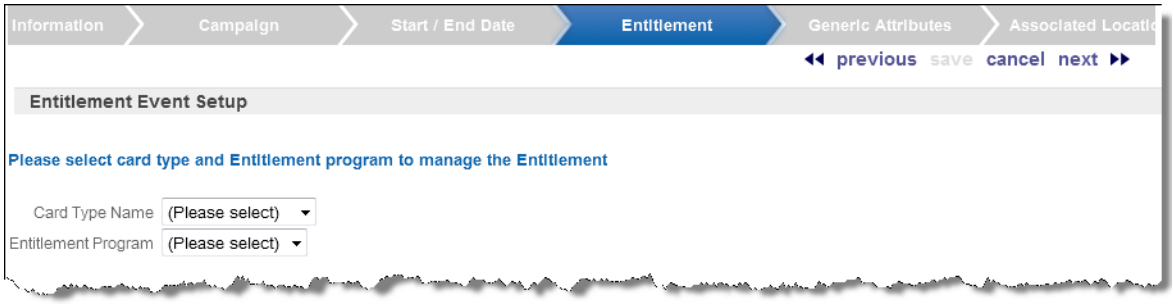


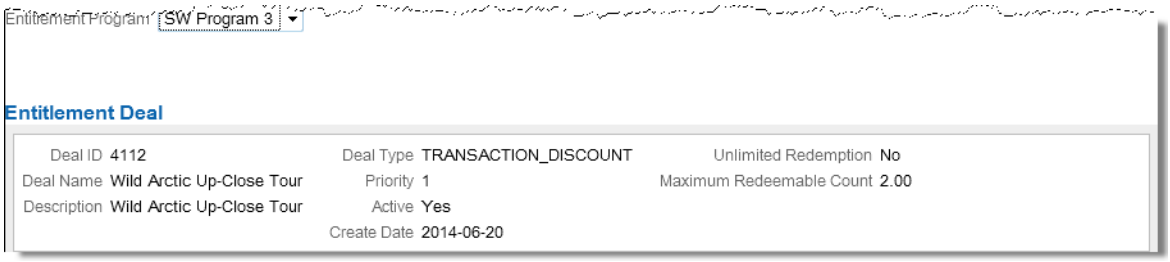
Figure 14-7: Entitlement Step

a. Use the **Card Type Name** Selection Menu to select the type of Card receiving the entitlements.

The Entitlement Program Selection Menu is populated.

b. Use the **Entitlement Program** Selection Menu to select the Entitlement Program to associate with the Card.

The Entitlement Deals are displayed.



11. Click **next**.

The Generic Attributes step opens.

12. Select or enter the configuration values for each of the **Required** Attributes.

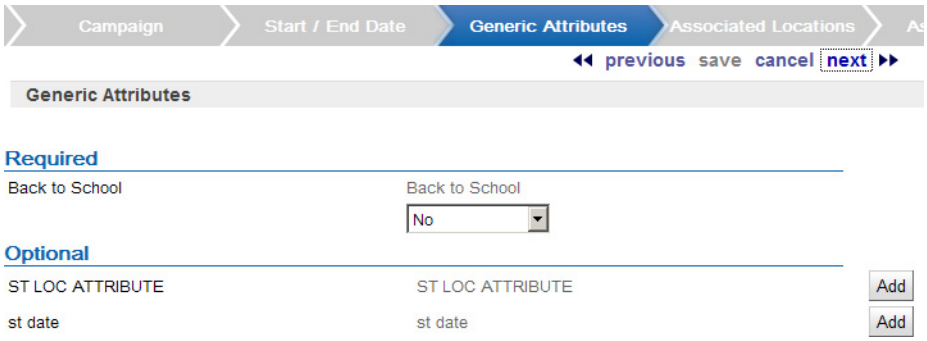


Figure 14-8: Generic Attributes Step

13. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
  - **1)** Click the **Add** button for the Attribute.

    A configuration field opens.
  - **2)** Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, click the **Delete** button for the Attribute.

  The Attribute is deleted.

14. Click **next**.

The Associated Locations step opens.

15. Define the Location Eligibility Rules for the Promotion.

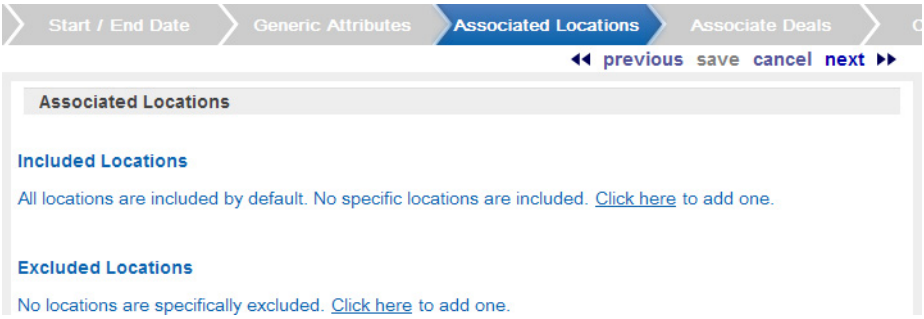


Figure 14-9: Associated Locations Step

- For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.
- For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.

16. Click **next**.

The Associate Deals step opens.

> *No additional Deals can be added to the Promotion.*
>
> *The Deal assigned to the Promotion cannot be changed or removed in this step; the Deal can only be changed or selected in the Entitlement step (above).*

17. If necessary, enter a **Deal Code** for the Deal:

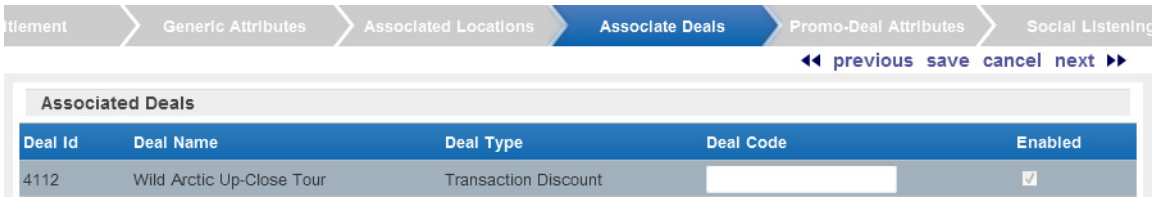


Figure 14-10: Associate Deals Step

18. Click **next**.

The Promo-Deal Attributes step opens.

19. Configure the Promo-Deal Attributes for the Promotion event:

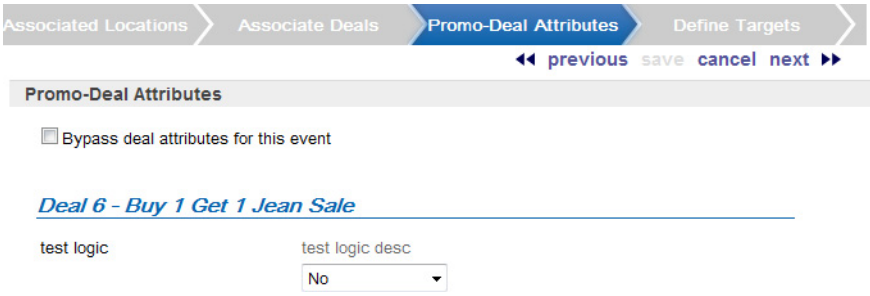


Figure 14-11: Promo-Deal Attributes Step

a. Use the **Bypass deal attributes for this event** Check Box to determine whether Promo-Deal Attributes will be used for this Promotion event:

- **Checked** (☑) - Attributes will NOT be used. The available attributes are removed from the screen. Continue with step 20.
- **Unchecked** (☐) - Attributes will be used. The available attributes are displayed. Continue with the next step.

b. Configure the Attribute(s) for the Promo-Deal(s).

20. Click **next**.

If **Include Social Listening** was selected, the Social Listening step opens. Continue with step 21 on page 431.

- If **Include Social Listening** was not selected, the Budget step opens. Continue with step 25 on page 433.

21. Define the keywords used by the Social Listening process:

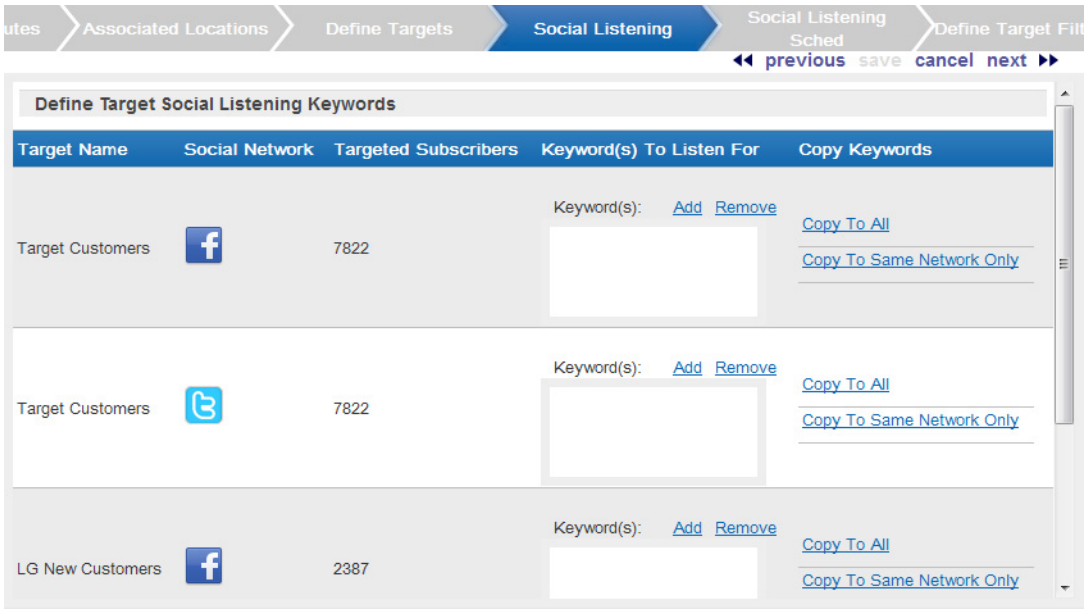


Figure 14-12: Social Listening Step

In Define Target Social Listening Keywords List, each social network configured for the system is listed once for each Target defined for the Promotion.

a. Add a keyword set to the social network for a Target:

1) Click the **Add** Link for a social network.

A Text Area Field opens.

2) Enter the keyword(s) to listen for into the Text Area Field.

3) Repeat steps 1-2 for each keyword set to enter for the social network.

b. If necessary, copy the keyword sets to other social networks:

> *Copying the keyword set(s) will REPLACE (rather than add to) currently configured any keyword set(s).*
>
> *For example, Network 1 has the keyword set "great item" and Network 2 has the keyword sets "still shopping" and "fantastic experience at the store". The user then clicks the* **Copy To All** *Link for Network 1. The only keyword set for Network 2 is now "great item".*

- Click the **Copy to Same Network Only** Link to copy the keyword set to the same social network for each Target.

  For example, if you enter "fantastic sale" in one Twitter row, clicking the **Copy to Same Network Only** Link will create a keyword set "fantastic sale" to the Twitter row for every Target.

- Click the **Copy to All** Link to copy the keyword set(s) to every social network for every Target.

c. If necessary, remove a set of keyword set from a Target's social network by clicking the Text Area Field for the keyword set, then clicking the **Remove** Link.

d. Repeat steps a-c as necessary for each Target and social network.

22. Click **next**.

The Social Listening Schedule step opens.

23. Configure the frequency at which the Job will check social media:

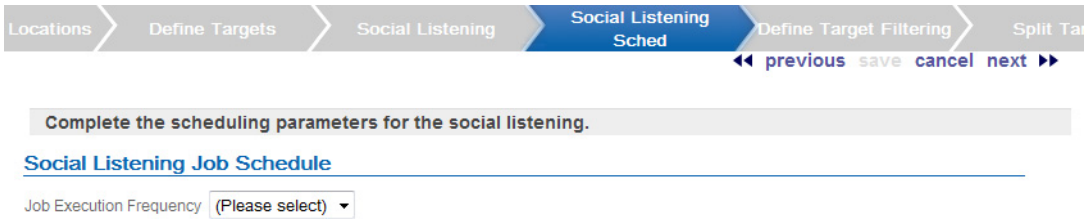


Figure 14-13: Social Listening Schedule Step

a. Select the **Job Execution Frequency** using the Selection Menu.

- **ONCE_LATER** - Run the Segment Query at a later date or time.
- **DAILY** - Run the Segment Query every day.
- **WEEKLY** - Run the Segment Query once each week.

- **MONTHLY** - Run the Segment Query once each month.

b. Use the **Start Date** Calendar Menu to select the start of the time range in which the job will run.

If you selected a Job Execution Frequency of **ONCE_LATER**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the time range in which the job will run.

- If you selected a Job Execution Frequency of **DAILY**, continue with step f.
- If you selected a Job Execution Frequency of **WEEKLY**, continue with step d.
- If you selected a Job Execution Frequency of **MONTHLY**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

24. Click **next**.

The Budget step opens.

25. Configure the Budget for the Promotion:

a. In the Promotion Costs List, enter the costs for the Promotion that are not specific to a Target:

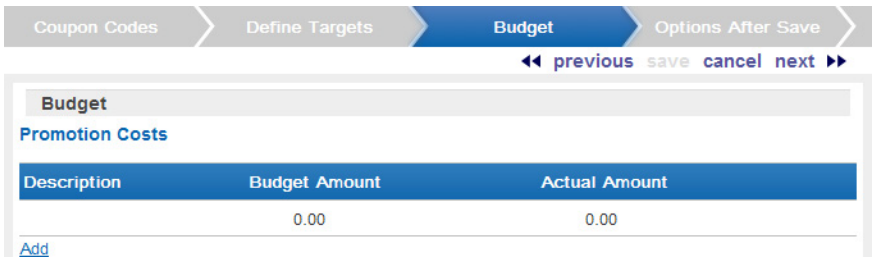
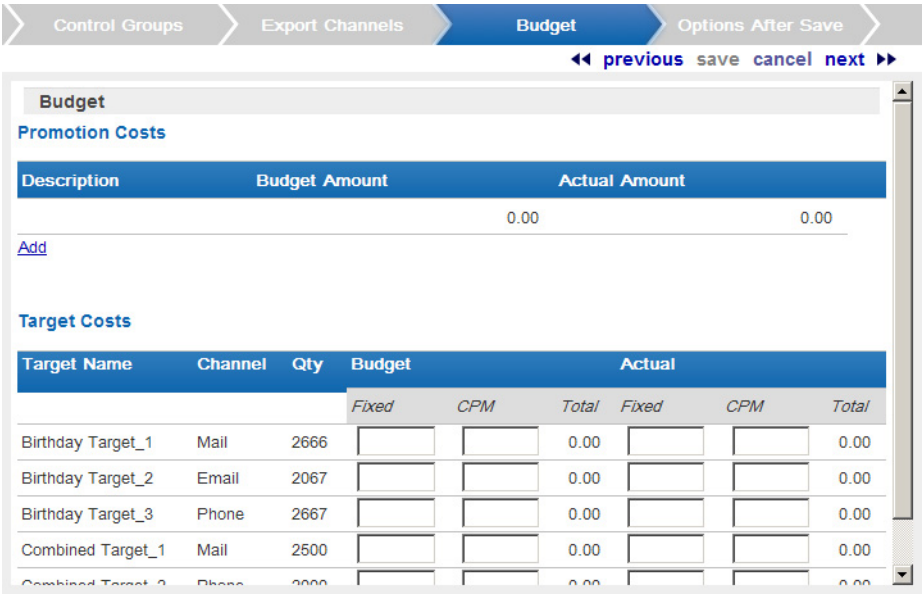


Figure 14-14: Budget Step for Targeted Promotion



1) Click the **Add** Link.

A new Promotion Cost line is added to the List.

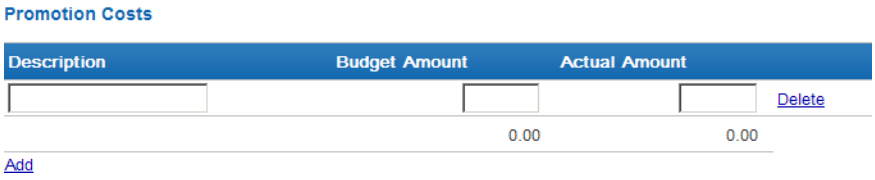


Figure 14-15: Promotion Costs

2) Enter a **Description** of the cost item.

3) Enter the budgeted amount of the item in the **Budget Amount** field.

4) Enter the actual amount of the item in the **Actual Amount** field.

5) Repeat steps 1-4 for each budget line item to add to the Promotion Costs.

6) If necessary, remove a line item by clicking its **Delete** Link.

b. If Targets are defined for the Promotion, use the Target Costs List to define the costs for each Target Channel in the Promotion:

1) In the **Budget-Fixed** field, enter the fixed cost budgeted for the Channel.

2) In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.

3) In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.

4) In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.

5) Repeat steps 1-4 for each Target Channel in the Promotion.

26. Click **next**.

- ❑ The Options After Save step opens.

27. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

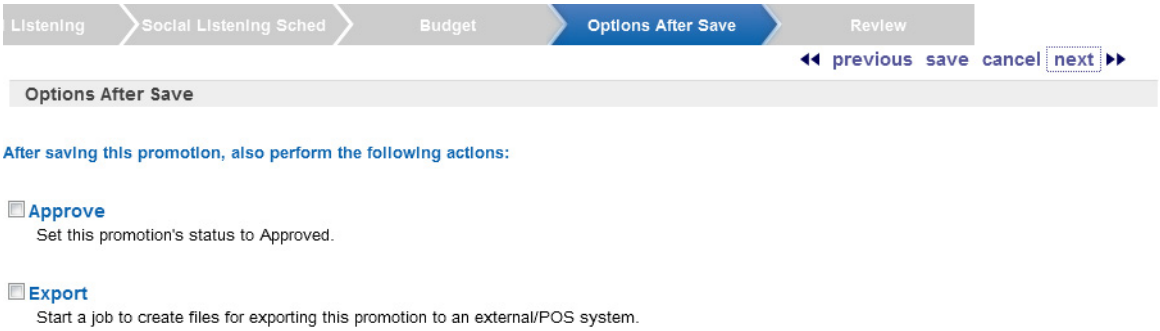


Figure 14-16: Options After Save Step

- ❑ **Approve** - Automatically approve the promotion.
- ❑ **Export** - Export the Promotion data to external systems, including POS systems.

28. Click **next**.

The Review step opens.

29. Review the entered information to ensure that it is correct.

- ❑ Click **save** to save the Promotion with its current configuration.
- ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
- ❑ Click **cancel** to cancel the changes and return to the Promotion List without saving the Promotion.

CHAPTER 15

Deals



Deal management is not available in Relate if the Enable Promote Integration configuration is set to **True***.*

See also: The *Relate Configuration Guide* for more information.

Overview

In Relate, Deals are price incentives given to the customer. These Deals can often be reused in separate Promotions. To facilitate and ease the reuse of existing Deals, a library of Deals can be created in Relate.

Deal Elements

There are some elements of Deals that appear in several locations. The elements have common values that can appear in menus or data fields. Some of these common elements and their possible values are described below.

Deal Types

The Deal Type determines the type of incentive provided by the Deal. Relate has the following Deal Types:

- **Transaction Discount** - A discount is applied to the subtotal of a transaction.
- **Line Item Discount** - A discount is applied to a specific line item within a transaction.
- **Fixed Quantity/Price** - A fixed price is assigned to defined item quantities within a transaction.
- **Kit** - A certain set of items that, when purchased together, has a certain discount or special price associated with them.

- **Gift with Purchase** - A gift is provided to the customer when they purchase certain, defined item(s).
- **Buy X Get X** - The purchase of a certain, defined item allows the customer to receive another of the same item at no cost or a discount.
- **Buy X Get Y** - The purchase of a certain, defined item allows the customer to receive a different item at no cost or a discount.
- **Tiered Discount** - A discount is applied to a defined set of items, where the amount of the discount depends on the quantity of the item in the transaction.

Intended Promotion Type

In Relate, Deals can be assigned an Intended Promotion Type. This indicates the manner in which a Deal is likely to be used.

- **Product** - A Deal that is applied directly to an item or transaction.
- **Coupon** - A Deal that is applied to an item or transaction through a Coupon.
- **Entitlement** - A Deal that is applied to an item or transaction as an Entitlement for a Customer.
- **Any -** A Deal that can be applied as a Product, Coupon, or Entitlement.

Deal List

The Deal List page is opened using the **Campaign->Product Deal Definition** menu option, or by clicking the **Product Deal Definition** Link on the Main Page.

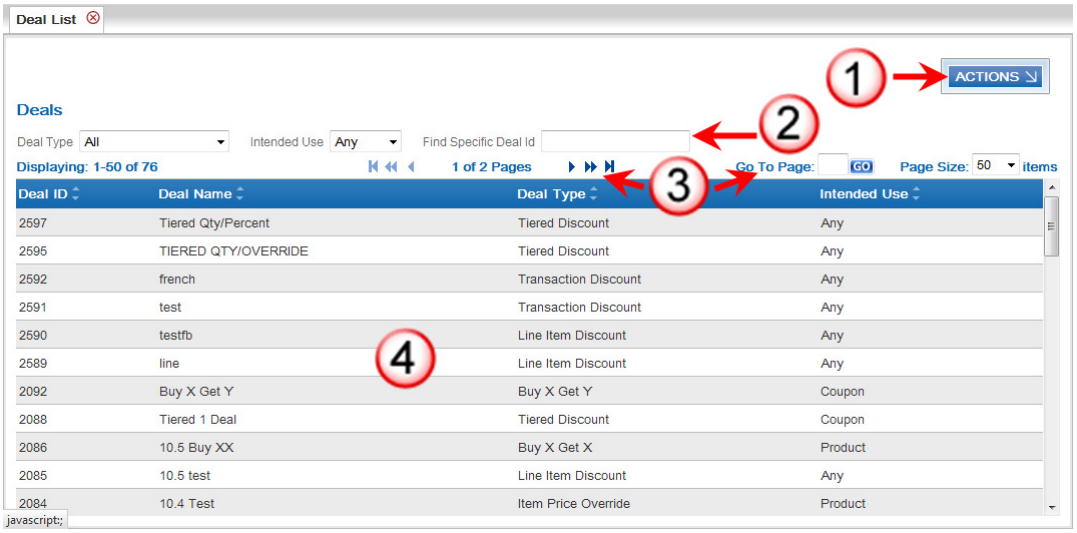


Figure 15-1: Deal List

Table 15-1: *Deal List Page Key*

Item	Description
1	**Actions Menu** - Click to open a menu of actions that can be performed in the Deal List page. See "Actions Menu" on page 439 for more information.
2	**Filters** - Select criteria in the Filters to view a subset of the Deals in the Deal List. See "Filters" on page 439 for more information.
3	**Page Navigation** - Page Navigation for the List.
4	**Deal List** - A List of Deals currently in the system. The List displays a limited number of Deals; use the Filter Menus to narrow down the List and locate a certain Deal. The following information is displayed for each Deal: ■ **Deal ID** - Unique ID for the Deal. ■ **Deal Name** - Name of the Deal. ■ **Deal Type** - The type of Deal. See "Deal Types" on page 436. ■ **Intended Use** - Intended Use of the Deal. See "Intended Promotion Type" on page 437.

Actions Menu



The Actions Menu in the Deal List page includes the following options:

- ❑ **CREATE** - Create a new Deal. See "Create a Deal" on page 443.

Filters

The Deal List page includes the following Filter fields:



Figure 15-2: Filter Menus

- **Deal Type** - Filters the List by Deal Type. This Selection Menu includes all possible Deal Types. Select **All** **[DEFAULT]** to display Deals of all types. See "Deal Types" on page 436 for a list of the possible values.
- **Intended Use** - Filters the List by the Intended Promotion Type. See "Intended Promotion Type" on page 437 for a list of possible values.
- **Find Specific Deal Id** - This Text Field filters the List to show only the Deal with the specified ID.
- **Attribute Type** - Filters the List by the Attribute assigned to the Deal. This Selection Menu contains the names of all the Attributes that can be assigned to a Deal.

Open a Deal

To open a Deal, click the Deal in the List. The Deal opens in a Deal Window.

Deal Window

The Deal Window displays information about the selected Deal and provides access to actions that can be performed on the Deal.

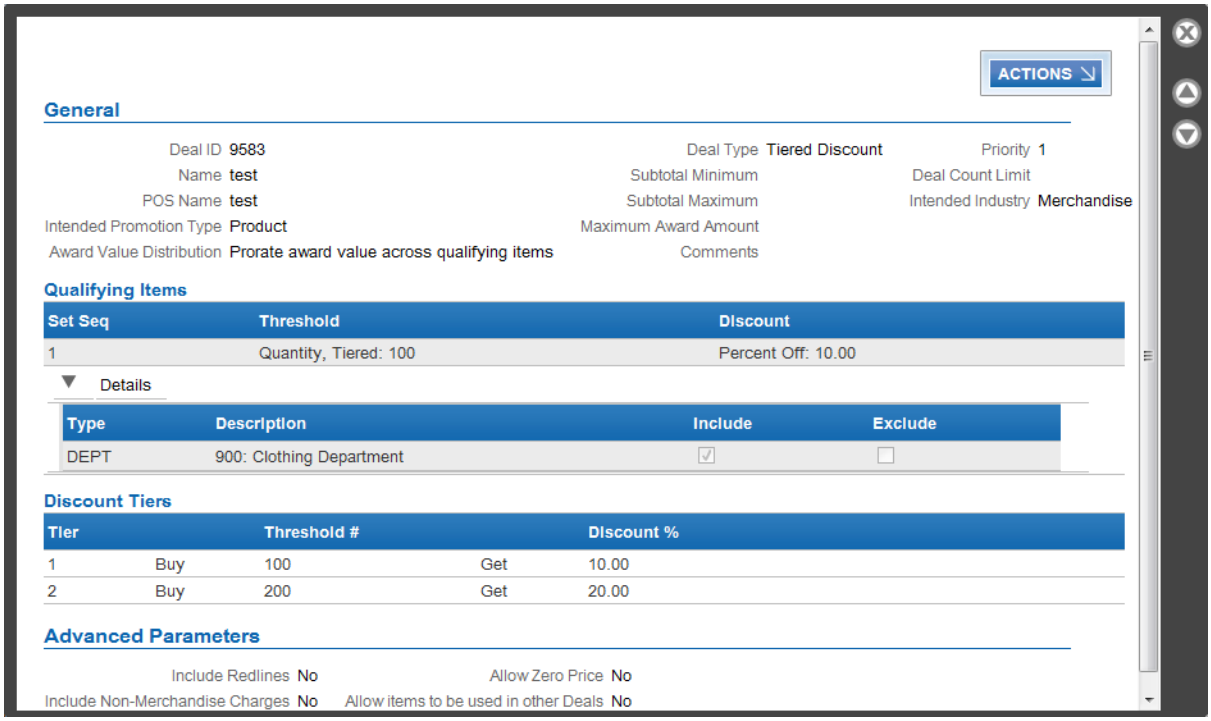


Figure 15-3: Deal Window

The Deal Window includes the following information:

> *The information displayed in the Window will depend upon the configuration of the Deal. Not all of the elements described below will be displayed for all Deals.*

- **General** - General information about the Deal. This includes the following information:
  - **Deal ID** - The unique ID for the Deal.
  - **Name** - The name of the Deal.
  - **POS Name** - The name of the Deal displayed on the POS system.
  - **Intended Promotion Type** - The type of Promotion to which the Deal can be applied. See "Intended Promotion Type" on page 437 for a list of possible values.
  - **Award Value Distribution** - Indicates whether the Deal amount is applied to each Item discounted by the Deal (**No**), or to the set of all Items discounted by the Deal (**Yes**).
  - **Deal Type** - The type of Deal. See "Deal Types" on page 436 for a list of the possible values.

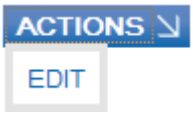
- **Subtotal Minimum** - Minimum subtotal amount for a transaction to be eligible for the Deal.
- **Subtotal Maximum** - Maximum subtotal amount for a transaction to be eligible for the Deal.
- **Maximum Award Amount** - The maximum currency amount of the Award.
- **Priority** - The priority given to the Deal, if more than one Deal can be applied to a Transaction.
- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction.
- **Comments** - Comments about the Deal.

- **Qualifying Items** - This List displays the Item Qualifying Rules for the Deal. This List includes the following information:
  - **Set Seq** - The Set number.
  - **Threshold** - The threshold style, type of threshold, and threshold amount for the Set.
  - **Discount** - The type of discount, the amount of the discount, and the maximum number of times the discount can be applied to a transaction.
  - **Details** - This List displays the Item Eligibility Rules for the Set. This List includes the following information:
    - **Type** - The type of Hierarchy ID.
    - **Description** - A description of the Hierarchy element or Attribute value.
    - **Include** - Indicates whether the Item(s) are included in the eligibility Set.
    - **Exclude** - Indicates whether the Item(s) are excluded from the eligibility Set.
- **Award Items** - If the Deal Type is Buy X Get X, or Buy X Get Y, this List is displayed, showing the Awards for the Deal. This List includes the following information:
  - **Award Quantity** - The number of Items in the Award.
  - **Discount** - The type and amount of the discount, along with the maximum number of times the Award can be given within a transaction.
  - **Award Value Distribution** - Indicates how the award is applied to items.
  - **Details** - This List displays the Items given as an Award for the Deal. This List includes the following information:
    - **Type** - The type of Hierarchy ID.
    - **Description** - A description of the Hierarchy element.
    - **Include** - Indicates whether the Item(s) are included in the eligibility Set.
    - **Exclude** - Indicates whether the Item(s) are excluded from the eligibility Set.
- **Discount Tiers** - If the Deal Type is Tiered Discount, this List is displayed, showing the tiers of the Deal. This List includes the following information:
  - **Tier** - Tier number.

- **Threshold #/Amount** - The number of items that must be purchased to qualify for the tier.
- **Discount %** - The discount percentage. *This field is only shown if the Discount Type is Percent Off.*
- **Discount Amount** - The discount amount. *This field is only shown if the Discount Type is Amount Off.*
- **Discount Override Price** - The new price of the item(s). *This field is only shown if the Discount Type is Override Price.*

- **Time Rules** - This List displays the Time Eligibility rules for the Deal. This List displays the following information:
  - **Name** - Name of the Rule.
  - **Start Time** - Time of day at which the Rule becomes active.
  - **End Time** - Time of day after which the Rule becomes inactive.
  - **Days of Week** - The days of the week on which the Deal is active.
- **Advanced Parameters** - Advanced configuration parameters for the Deal. This includes the following information:
  - **Include Redlines** - Indicates whether redlines are included in the Deal.
  - **Include Non-Merchandise Charges** - Indicates whether non-merchandise charges are included in the Deal.
  - **Allow Zero Price** - Indicates whether free Items are included in the Deal.
  - **Allow items to be used in other Deals** - Indicates whether the items used by the Deal can be used again in other Deals applied to a transaction.

Actions Menu



The Actions Menu for the Deal Window includes the following option:

- **EDIT** - Edit the Deal.

Edit a Deal

To edit a Deal, click **Edit** in the Actions Menu in the Deal Window.

The Deal in opened in the Deal Creation Wizard, with all of the fields populated with the current Deal configurations.

- Use Wizard Navigation to move through the Wizard and make any necessary changes.
- Click **save** when you are finished making changes. The Wizard closes, saving the entered configurations and returning to the Deal List.
- Click **cancel** to exit the Wizard and return to the Deal List without saving the changes.

For more information about the fields and information to be entered, see "Create a Deal" on page 443.

Create a Deal

To create a Deal in Relate:

1. In the Deal List page, click **Create** in the Actions Menu.

> *If there are no Deals defined, Relate provides a* **Click Here** *Link for adding a Deal.*

The Create Deal Wizard opens to the Define Name step.

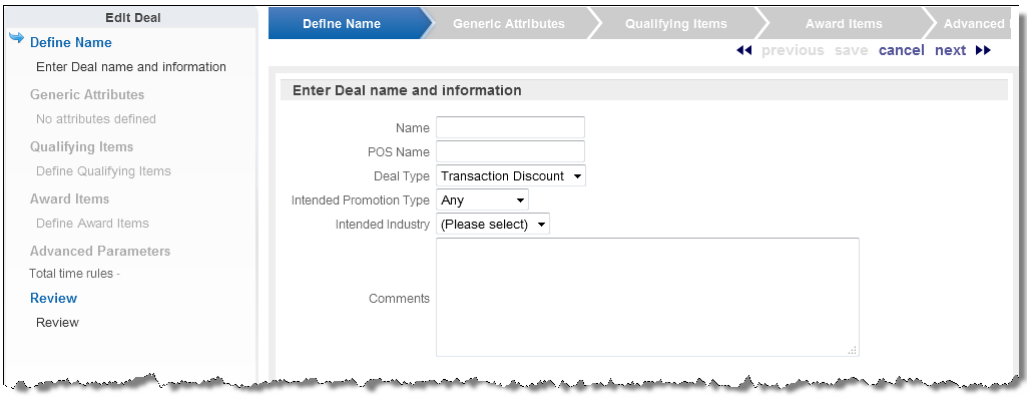


Figure 15-4: Create Deal Wizard

2. Define the basic information about the Deal:
   - **Name** - The name of the Deal.
   - **POS Name** - The name displayed for the Deal on a POS system.
   - **Deal Type** - The type of Deal. This Selection Menu has the following options:
     - **Transaction Discount** - **[DEFAULT]** A discount is applied to the subtotal of a transaction.
     - **Line Item Discount** - A discount is applied to a specific line item within a transaction.
     - **Fixed Quantity/Price** - A fixed price is assigned to defined item quantities.
     - **Kit** - A certain set of items, when purchased together, has a certain discount or special price associated with them.
     - **Gift with Purchase** - A gift is provided to the customer when they purchase certain, defined item(s).
     - **Buy X Get X** - The purchase of a certain, defined item allows the customer to receive another of the same item at no cost or a discount.
     - **Buy X Get Y** - The purchase of a certain, defined item allows the customer to receive a different item at no cost or a discount.
     - **Tiered Discount** - A discount is applied to a defined set of items, where the amount of the discount depends on the quantity of the item in the transaction.

- **Intended Promotion Type** - The expected method for applying the Deal. This Selection Menu has the following options:
  - **Any** - **[DEFAULT]** The Deal may be applied either directly to a transaction, or through a Coupon.
  - **Coupon** - The Deal is applied through a Coupon applied to the transaction.
  - **Product** - The Deal is applied directly to a transaction.
  - **Entitlement** - The Deal is given to a Customer as an Entitlement.
- **Intended Industry** - The intended industry for the Deal. *This Selection Menu is only available when the Intended Industry Prompt Option is set to SHOW_PROMPT.*

> **See also:** The *Relate Configuration Guide* for more information about Conflate and this configuration.

- **Comments** - Additional comments about the Deal.

3. Click **next**.

   A step opens for configuring settings specific to the selected Deal Type. The next step depends upon the Deal Type selected:

   - If the selected Deal Type is **Line Item Discount**, **Fixed Quantity/Price**, **Gift with Purchase**, **Buy X Get X**, or **Transaction Discount**, continue with step 4.
   - If the selected Deal Type is **Kit**, or **Buy X Get Y** continue with step 16 on page 451.
   - If the selected Deal Type is **Tiered Discount**, continue with step 22 on page 455.

4. Configure the Qualifying Items settings:

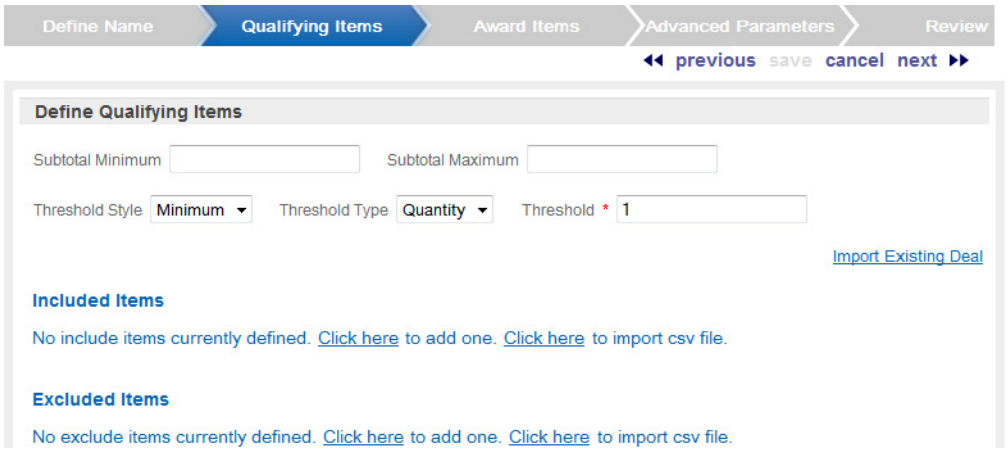


Figure 15-5: Qualifying Items Settings

- **Subtotal Minimum** - The minimum subtotal required for the transaction to be eligible for the discount.
- **Subtotal Maximum** - The maximum subtotal required for the transaction to be eligible for the discount.

- **Threshold Style** - The style of threshold to set.

> *The options available in this Selection Menu will vary, depending upon the Deal Type selected.*

  - **Minimum** - A minimum threshold.
  - **Exact** - The item quantity must exactly match the Threshold.
- **Threshold Type** - The type of threshold. This Selection Menu has the following options:
  - **Quantity** - The number of qualifying items.
  - **Amount** - The total amount of the qualifying items.
- **Threshold** - The amount of the threshold. The type of value depends upon the selected Threshold Type.
- **Included Items** - Determines the items that are included in the Deal. This configuration uses Item Eligibility entry rules.
- **Excluded Items** - Determines the items that are excluded from the Deal. This configuration uses Item Eligibility entry rules.

5. Click **next**.

- If the Deal Type is **Transaction Discount**, continue with step 6.
- If the Deal Type is **Line Item Discount**, continue with step 8 on page 446.
- If the Deal Type is **Fixed Quantity/Price**, continue with step 10 on page 447.
- If the Deal Type is **Gift with Purchase**, continue with step 12 on page 448.
- If the Deal Type is **Buy X Get X**, continue with step 14 on page 450.

6. Define the awards for a Transaction Discount type:

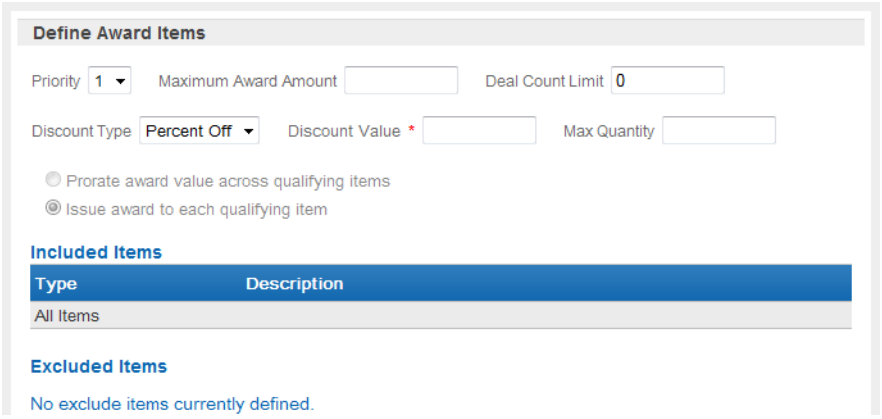


Figure 15-6: Transaction Discount Award Settings

- **Priority** - If more than one Deal can be applied to a Transaction, this Selection Menu determines the priority given to the Deal.
- **Maximum Award Amount** - The maximum currency amount of the discount.

- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction. Set to **0** **[DEFAULT]** for no limit.
- **Discount Type** - The type of discount. This Selection Menu has the following options:
  - **Percent Off** - The discount is a certain percentage off of the qualifying item(s). The Discount Value field determines the percentage.
  - **Amount Off** - The discount is a fixed amount off of the qualifying item(s). The Discount Value field determines the amount.
- **Discount Value** - The amount of the discount (see above).
- **Max Quantity** - Maximum quantity of the matching item(s) that can be used to satisfy the item rule.
- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are only enabled for* **Amount Off** *discount types.* These Radio Buttons have the following options:
  - **Prorate award value across qualifying items** - The amount of the discount is divided by the number of items and then that amount is applied to each Item.
  - **Issue award to each qualifying items** - The amount of the discount is applied to each Item.

7. Continue with step 25 on page 457.

8. Define the awards for a Line Item Discount type:

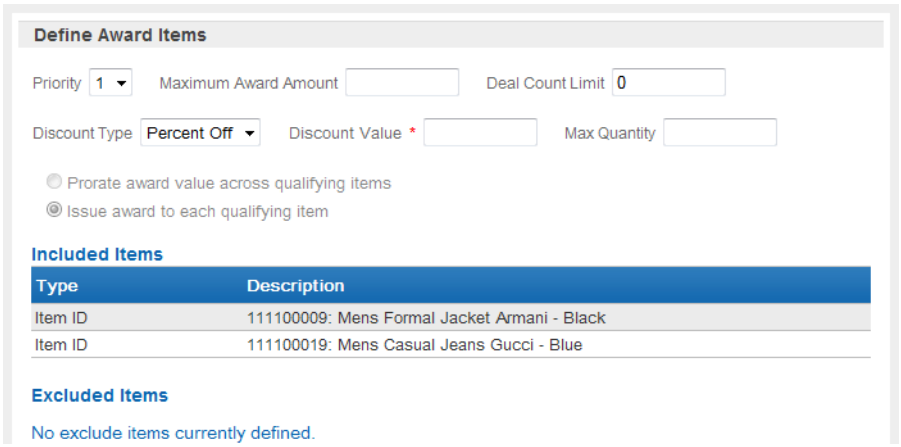


Figure 15-7: Line Item Discount Award Settings

- **Priority** - If more than one Deal can be applied to a Transaction, this Selection Menu determines the priority given to the Deal.
- **Maximum Award Amount** - The maximum currency amount of the discount.
- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction. Set to **0** **[DEFAULT]** for no limit.
- **Discount Type** - The type of discount. This Selection Menu has the following options:

- **Percent Off** - The discount is a certain percentage off of the qualifying item(s). The Discount Value field determines the percentage.
- **Amount Off** - The discount is a fixed amount off of the qualifying item(s). The Discount Value field determines the amount.

- **Discount Value** - The amount of the discount (see above).
- **Max Quantity** - Maximum quantity of the matching item(s) that can be used to satisfy the item rule.
- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are only enabled for* **Amount Off** *discount types.* These Radio Buttons have the following options:
  - **Prorate award value across qualifying items** - The amount of the discount is divided by the number of items and then that amount is applied to each Item.
  - **Issue award to each qualifying items** - The amount of the discount is applied to each Item.

9. Continue with step 25 on page 457.

10. Define the Award for the Fixed Quantity/Price Deal type:

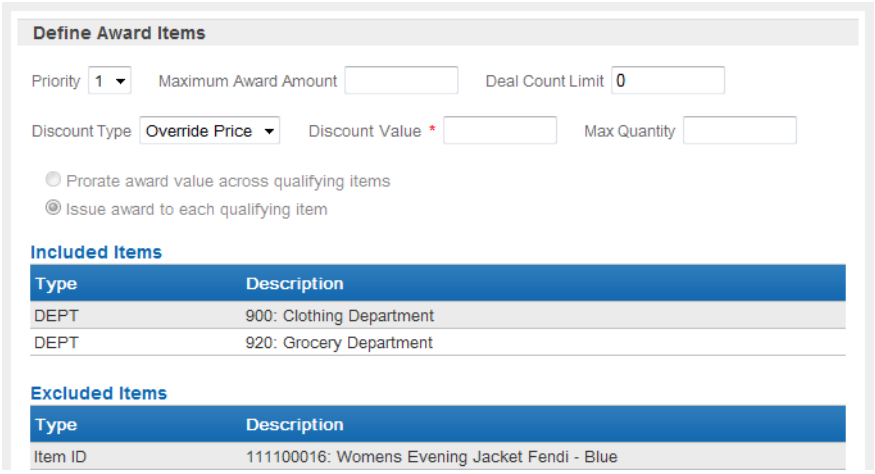


Figure 15-8: Fixed Quantity/Price Award Definition

- **Priority** - If more than one Deal can be applied to a Transaction, this Selection Menu determines the priority given to the Deal.
- **Maximum Award Amount** - The maximum currency amount that can be discounted from the transaction.
- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction. Set to **0** **[DEFAULT]** for no limit.
- **Discount Type** - The type of discount. This Selection Menu has the following options:
  - **Override Price** - A new price is set for the qualifying Item. The Discount Value field determines the new price.
- **Discount Value** - The new price for the Item(s).

- **Max Quantity** - Maximum quantity of the matching item(s) that can be used to satisfy the item rule.
- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are never enabled for this Deal type.*

11. Continue with step 25 on page 457.

12. Define the Award for a Gift with Purchase Deal type:

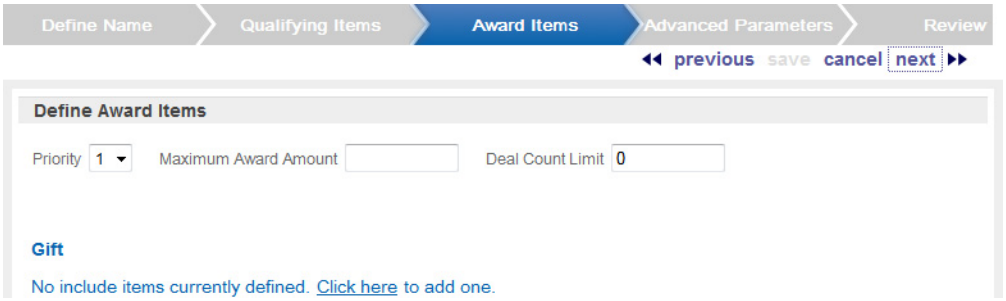


Figure 15-9: Gift with Purchase Award Definition

- **Priority** - If more than one Deal can be applied to a Transaction, this Selection Menu determines the priority given to the Deal.
- **Maximum Award Amount** - The maximum currency amount that can be discounted from the transaction.
- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction. Set to **0** **[DEFAULT]** for no limit.
- **Discount Type** - The type of discount used on the Gift. *Not shown until the Gift is selected (see below).*

  This Selection Menu has the following options:

  - **Percent Off** - The discount is a certain percentage of the price of the Gift. The Discount Value field determines the percentage.
  - **Amount Off** - The discount is a fixed amount off of the price of the Gift. The Discount Value field determines the amount.
  - **Override Price** - A new price is set for the Gift. The Discount Value field determines the new price.
- **Discount Value** - The amount of the discount (see above). *Not shown until the Gift is selected (see below).*
- **Max Quantity** - Maximum quantity of the matching item(s) that can be used to satisfy the item rule. *Not shown until the Gift is selected (see below).*
- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are only enabled for* **Amount Off** *discount types.* These Radio Buttons have the following options:

  - **Prorate award value across qualifying items** - The amount of the discount is divided by the number of items and then that amount is applied to each Item. *Not shown until the Gift is selected (see below).*

- **Issue award to each qualifying items** - The amount of the discount is applied to each Item. *Not shown until the Gift is selected (see below).*

- **Gift** - This List displays the Item that is the Award for the Deal. Perform the following steps to select the Item:

1) Click the **Click here** Link.

An Item Hierarchy Search Window opens.

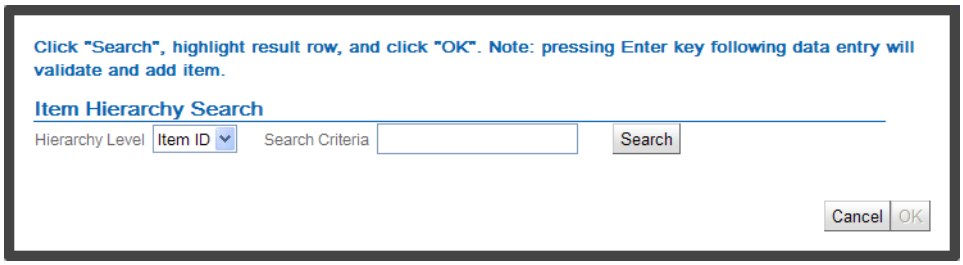


Figure 15-10: Item Hierarchy Search Window

2) Enter the search information:

Hierarchy Level - Use this Selection Menu to determine the Item Hierarchy Level to search (**Item ID** is the only available option).

Search Criteria - The value to search for in the Hierarchy Level.

3) Click **Search**.

A List of Items matching the search criteria is displayed.

4) Click an Item to select it.

5) Click **OK**.

The Window closes and the Item is displayed in the Gift List.

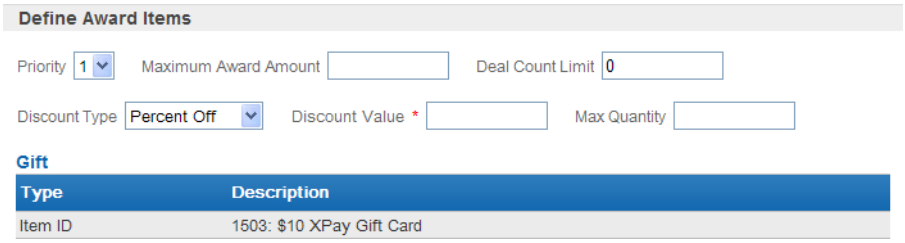


Figure 15-11: Gift Item Selected

6) Define the **Discount Type**, **Discount Value**, and **Max Quantity** of the Gift (see above).

13. Continue with step 25 on page 457.

14. Define the Award for a Buy X Get X Deal type:

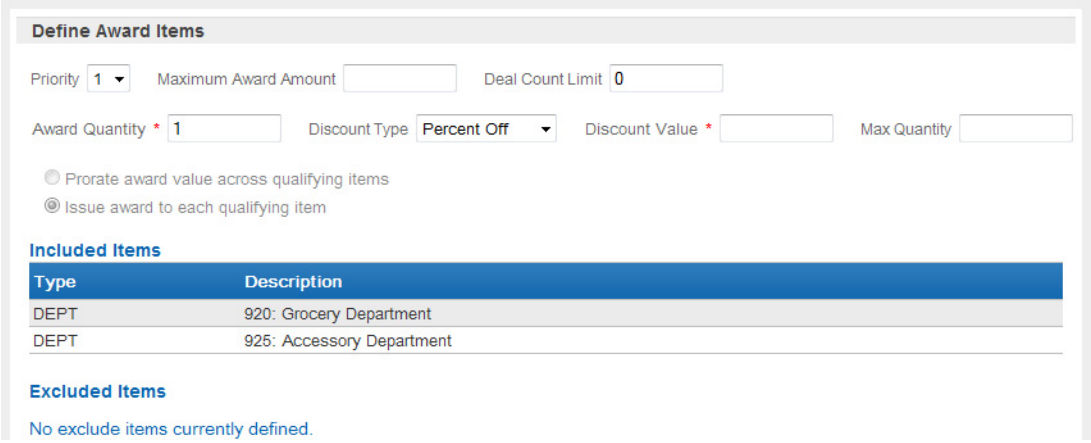


Figure 15-12: Buy X Get X Award Definition

- **Priority** - If more than one Deal can be applied to a Transaction, this Selection Menu determines the priority given to the Deal.
- **Maximum Award Amount** - The maximum currency amount that can be discounted from the transaction.
- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction. Set to **0** **[DEFAULT]** for no limit.
- **Award Quantity** - The number of Items that are given in each Award.
- **Discount Type** - The type of discount used on the Award. This Selection Menu has the following options:
  - **Percent Off** - The discount is a certain percentage of the price of the Award. The Discount Value field determines the percentage.
  - **Amount Off** - The discount is a fixed amount off of the price of the Award. The Discount Value field determines the amount.
  - **Override Price** - A new price is set for the Award. The Discount Value field determines the new price.
- **Discount Value** - The amount of the discount (see above).
- **Max Quantity** - Maximum quantity of the matching item(s) that can be used to satisfy the item rule.
- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are only enabled for* **Amount Off** *discount types.* These Radio Buttons have the following options:
  - **Prorate award value across qualifying items** - The amount of the discount is divided by the number of items and then that amount is applied to each Item.
  - **Issue award to each qualifying items** - The amount of the discount is applied to each Item.

15. Continue with step 25 on page 457.

16. Configure the Qualifying Items settings:

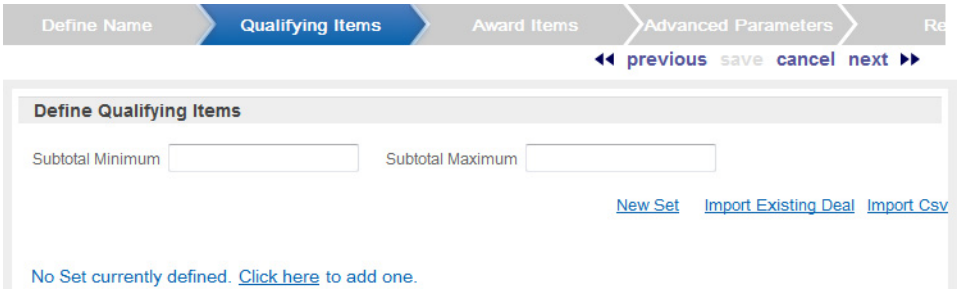


Figure 15-13: Define Qualifying Items Settings

- **Subtotal Minimum** - The minimum subtotal required for the transaction to be eligible for the discount.
- **Subtotal Maximum** - The maximum subtotal required for the transaction to be eligible for the discount.
- **Set #** - In this Deal Type, qualifying Items are organized into Sets. Each Set contains an Item or Items that provide one offer for Items included in the Set.
  - To add a Set to the Deal, click the **New Set** Link. If no Sets have been defined, Relate also provides a **Click here** Link for creating a new Set.
  - To import a set of Items in a comma-separated values (CSV) file, click the **Import Csv** Link and follow the procedure "Import Item Eligibility Rules" on page 62.
  - To import a set of Item Eligibility Rules from a Deal into a Set, click the **Import Existing Deal** Link and follow the procedure "Import Existing Deal" on page 63.

    After importing the Item Eligibility Rules for a Deal, the Rules can be altered in the current Deal.



If multiple Deals are imported, the Item Eligibility Rules for each Deal are imported into a separate Set. For example, if three Deals are imported, three new Sets will be created.

Each Set has the following configurations:

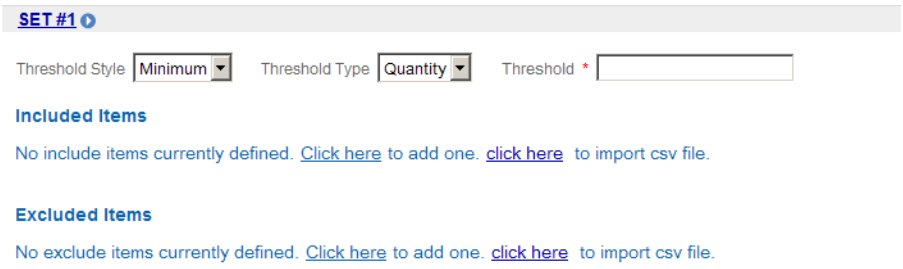


Figure 15-14: Set Configuration

- **Threshold Style** - The style of threshold to set. This Selection Menu has the following options:

Exact - An exact value.

Minimum - A minimum threshold.

- **Threshold Type** - The type of threshold. This Selection Menu has the following options:

  Quantity - The number of qualifying items.

  Amount - The total currency amount of the qualifying items.

- **Threshold** - The amount of the threshold. The type of value depends upon the selected Threshold Type.
- **Included Items** - Determines the items that are included in the Set. This configuration uses Item Eligibility entry rules.
- **Excluded Items** - Determines the items that are excluded from the Set. This configuration uses Item Eligibility entry rules.

17. Click **next**.

- If the Deal Type is **Kit**, continue with step 18 on page 452.
- If the Deal Type is **Buy X Get Y**, continue with step 20 on page 453.

18. Define the Award(s) for the Kit Deal type:

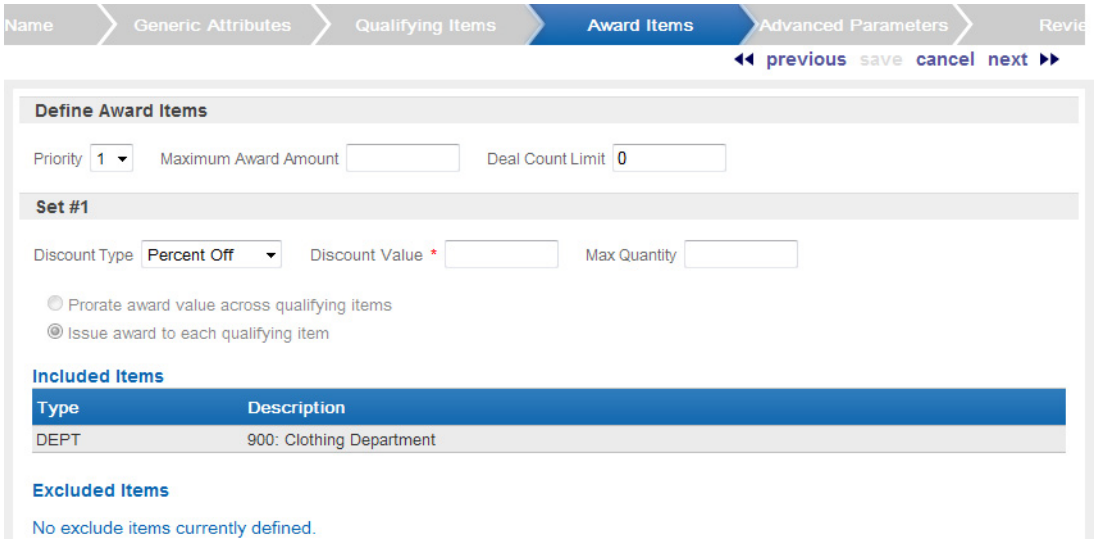


Figure 15-15: Kit Award Definition

- **Priority** - If more than one Deal can be applied to a Transaction, this Selection Menu determines the priority given to the Deal.
- **Maximum Award Amount** - The maximum currency amount that can be discounted from the transaction.
- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction. Set to **0** **[DEFAULT]** for no limit.
- **Sets** - Define the discount given to each Set in the Deal.

- **Discount Type** - The type of discount. This Selection Menu has the following options:

  Percent Off - The discount is a certain percentage off the price of the qualifying item(s). The Discount Value field determines the percentage.

  Amount Off - The discount is a fixed amount off the price of the qualifying item(s). The Discount Value field determines the amount.

  Override Price - The new price for the qualifying Item. The Discount Value field determines the new price.

- **Discount Value** - The amount of the discount (see above).
- **Max Quantity** - Maximum quantity of the matching item(s) that can be used to satisfy the item rule.
- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are only enabled for* **Amount Off** *discount types.* These Radio Buttons have the following options:

  Prorate award value across qualifying items - The amount of the discount is divided by the number of items and then that amount is applied to each Item.

  Issue award to each qualifying items - The amount of the discount is applied to each Item.

19. Continue with step 25 on page 457.

20. Define the Award(s) for a Buy X Get Y Deal type:

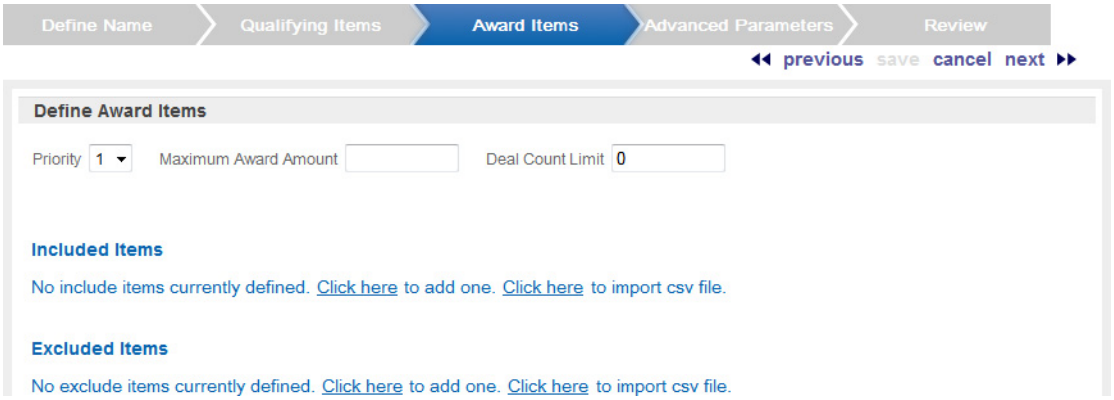


Figure 15-16: Buy X Get Y Award Definition

- **Priority** - If more than one Deal can be applied to a Transaction, this Selection Menu determines the priority given to the Deal.
- **Maximum Award Amount** - The maximum currency amount that can be discounted from the transaction.
- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction. Set to **0** **[DEFAULT]** for no limit.

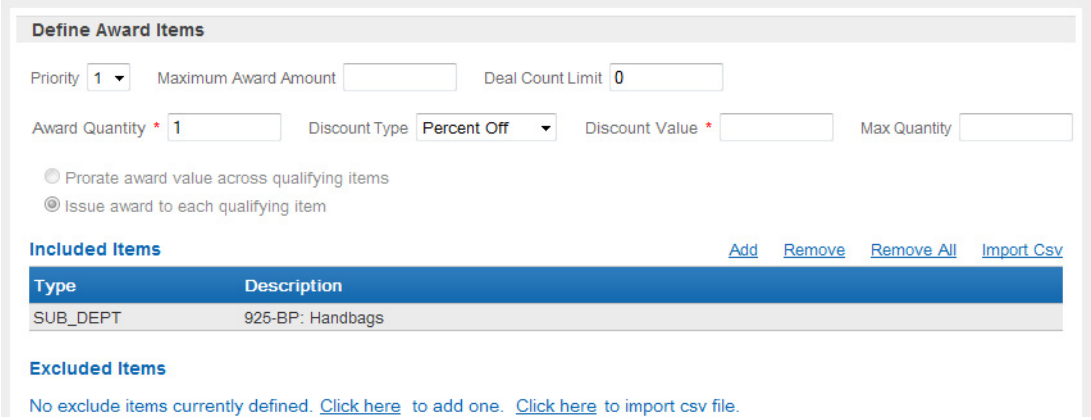


Figure 15-17: Define Award Items - Award Item Added

- **Award Quantity** - The number of Items in the Award. *Not shown until the Gift is selected (see below).*
- **Discount Type** - The type of discount used on the Gift. *Not shown until the Gift is selected (see below).*

  This Selection Menu has the following options:

  - **Percent Off** - The discount is a certain percentage of the price of the Gift. The Discount Value field determines the percentage.
  - **Amount Off** - The discount is a fixed amount off of the price of the Gift. The Discount Value field determines the amount.
  - **Override Price** - A new price is set for the Gift. The Discount Value field determines the new price.
- **Discount Value** - The amount of the discount (see above). *Not shown until the Gift is selected (see below).*
- **Max Quantity** - Maximum quantity of the matching item(s) that can be used to satisfy the item rule. *Not shown until the Gift is selected (see below).*
- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are only enabled for* **Amount Off** *discount types.* These Radio Buttons have the following options:

  - **Prorate award value across qualifying items** - The amount of the discount is divided by the number of items and then that amount is applied to each Item. *Not shown until the Gift is selected (see below).*
  - **Issue award to each qualifying items** - The amount of the discount is applied to each Item. *Not shown until the Gift is selected (see below).*
- **Included Items** - Determines the items that are included as Award Items for all Sets. This configuration uses Item Eligibility entry rules.
- **Excluded Items** - Determines the items that are excluded as Award Items for all Sets. This configuration uses Item Eligibility entry rules.

21. Continue with step 25 on page 457.

22. Configure the Qualifying Items for the Tiered Deal:

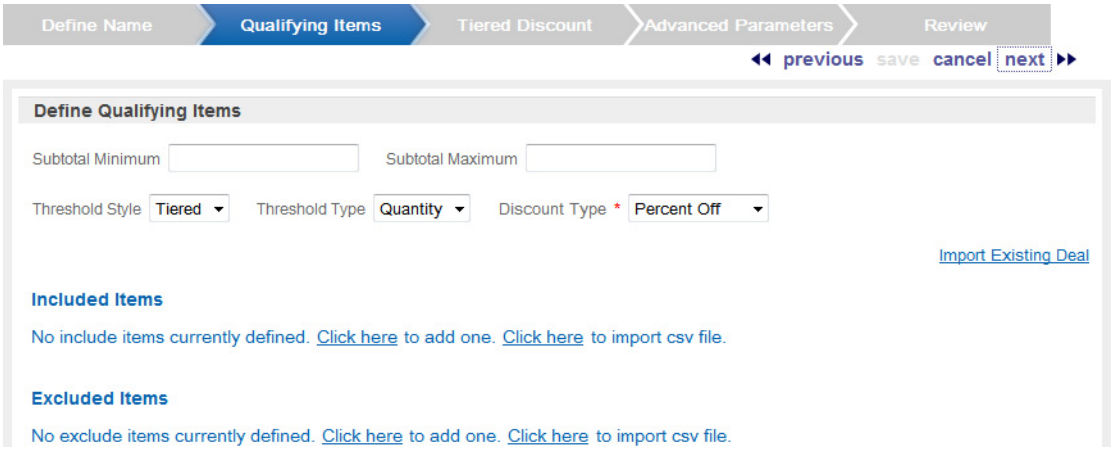


Figure 15-18: Qualifying Items Settings for Tiered Deals

- **Subtotal Minimum** - The minimum subtotal required for the transaction to be eligible for the discount.
- **Subtotal Maximum** - The maximum subtotal required for the transaction to be eligible for the discount.
- **Threshold Style** - The style of threshold to set.
  - **Tiered** - The thresholds are determined by tiers (see below).
- **Threshold Type** - The type of threshold. This Selection Menu has the following options:
  - **Quantity** - The number of qualifying items.
  - **Amount** - The total amount of the qualifying items.
- **Discount Type** - The type of discount. This Selection Menu has the following options:
  - **Percent Off** - **[DEFAULT]** Item(s) discounted by a percentage of the item price.
  - **Amount Off** - Item(s) discounted by a currency amount.
  - **Override Price** - Item(s) set to a new price for each item.
- **Included Items** - Determines the items that are included in the Deal. This configuration uses Item Eligibility entry rules.
- **Excluded Items** - Determines the items that are excluded from the Deal. This configuration uses Item Eligibility entry rules.

23. Click **next** to continue.

24. Define the Discount Tiers for the Deal:

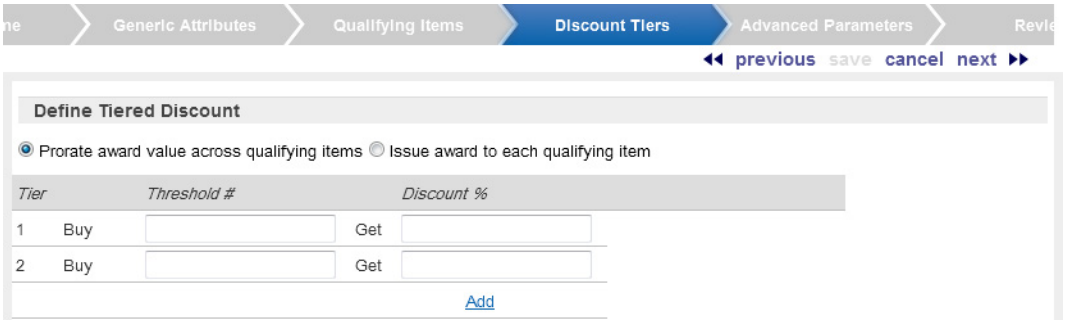


Figure 15-19: Tiered Discount Definition (Percent Off)

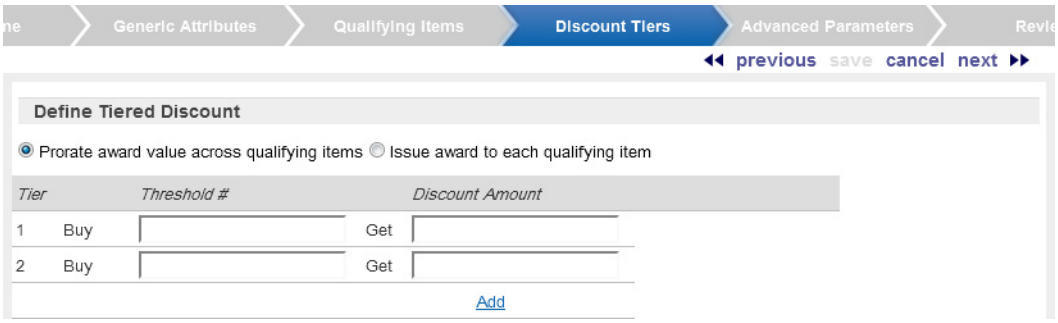


Figure 15-20: Tiered Discount Definition (Amount Off)

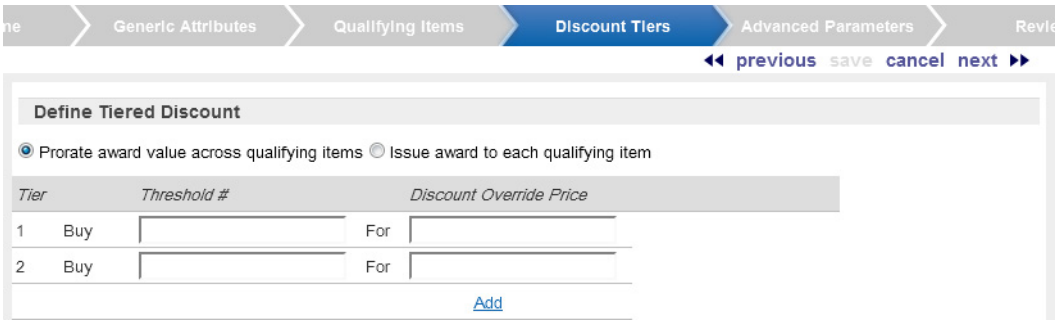


Figure 15-21: Tiered Discount Definition (Price Override)



At least two tiers must be defined for a Tiered Discount Deal.

- Award application method Radio Buttons that determine how a discount is applied to the award Items. *These Radio Buttons are only enabled for* **Amount Off** *discount types.* These Radio Buttons have the following options:
  - **Prorate award value across qualifying items** - The amount of the discount is divided by the number of items and then that amount is applied to each Item.

- **Issue award to each qualifying items** - The amount of the discount is applied to each Item.

- For each Tier, enter the following information:
  - **Buy** - The quantity threshold that must be met or exceeded to qualify for the Tier-level discount.
  - **Get** - The discount applied to the Items. *This field is only displayed when the discount type selected in step 22 is Percent Off or Amount Off*.
  - **For** - The price applied to the Items; this quantity is in the **Buy** field. *This field is only displayed if the discount type selected in step 22 is Price Override*.
- Click the **Add** Link to add a new Tier to the Deal.
- Click the **Remove** Link for a Tier to remove it from the Deal.

25. Click **next**.

26. Configure the Advanced Parameters:

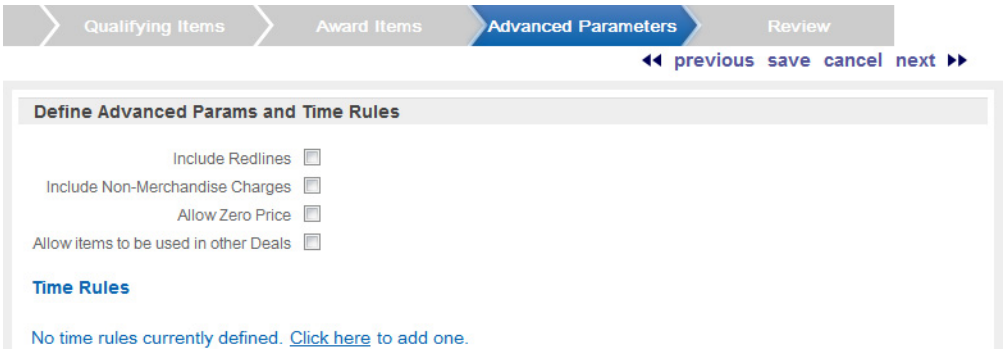


Figure 15-22: Advanced Parameters Step

- **Include Redlines** - This Check Box determines whether Redlines will be included in the Deal (**[DEFAULT]** = **Unchecked/No**).

  Depending upon your system configuration, when this item is checked, any item with a stock status of "Clearance" will be included in the Deal.
- **Include Non-Merchandise Charges** - This Check Box determines whether non-merchandise charges are included in the Deal (**[DEFAULT]** = **Unchecked/No**).
- **Allow Zero Price** - This Check Box determines whether zero-priced items are included in the Deal (**[DEFAULT]** = **Unchecked/No**).
- **Allow items to be used in other Deals** - This Check Box determines whether the items in the deal can be used in another deal at the POS. If **Unchecked** **[DEFAULT]**, the items can only be used in one deal per transaction. If **Checked**, the items can be used in more than one deal per transaction.

27. If necessary, add Time Rules for the Deal by doing the following:

a. Open the Time Rules editing Window by doing one of the following:
- Click the **Click here** Link (if no Time Rules are configured).
- Click the **Add** Link to add a new Time Rule to the List.

The Time Rule Detail Window opens.

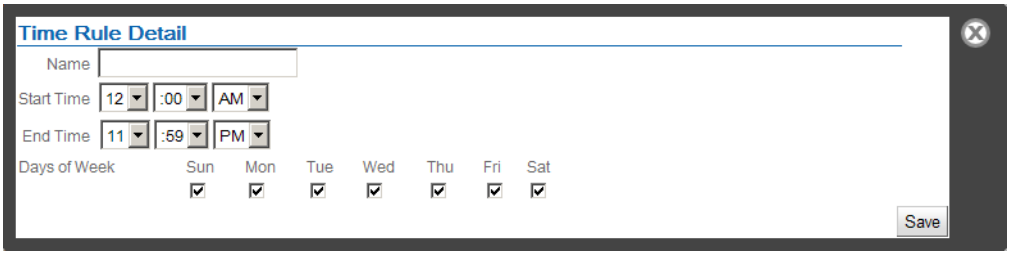


Figure 15-23: Time Rule Detail Window

b. Configure the Time Rule parameters:

- **Name** - The name of the Time Rule (must be unique).
- **Start Time** - These Time Menus determine the time at which the Deal can be applied on each qualifying day.
- **End Time** - These Time Menus determine the time after which the Deal can no longer be applied.
- **Days of Week** - This Check Box set determines the days of the week on which the Deal can be applied.

c. Click the **Save** button.

The Time Rule Detail Window closes and the configured Time Rule is added to the List.

d. Repeat step a-c for each Time Rule to be added to the Deal.

28. If necessary, delete incorrect or unneeded Time Rules by doing the following:

a. Click a row in the Time Rules List.

b. The Time Rule Detail Window opens.

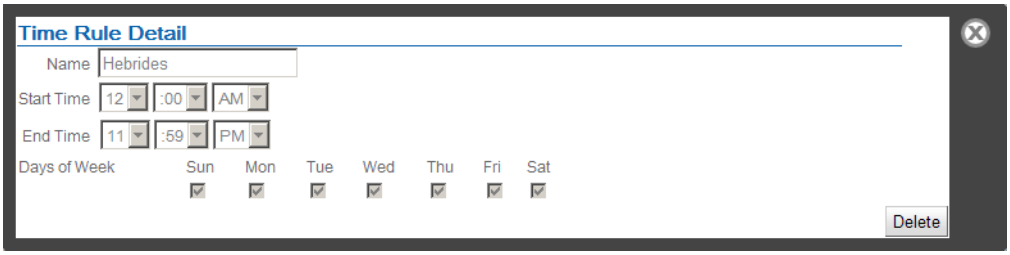


Figure 15-24: Time Rule Detail Window - Existing Rule



The configuration options in the Time Rule Detail Window cannot be edited. The Time Rule can only be deleted and, if necessary, a new Time Rule created to replace it (step 27).

c. Click the **Delete** button.

The Time Rule Detail Window closes and the Time Rule is removed from the List.

d. Repeat step a-c for each Time Rule to be deleted from the Deal.

29. Click **next**.

The Review step opens.

30. Review the entered information to ensure that it is correct.

- Click **save** to save the Deal with its current configuration and return to the Deal List.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to cancel the changes and return to the Deal List without saving the Promotion.

CHAPTER 16

Card Definitions

Overview

Card Definitions determine the attributes of all the Customer Programs for which Cards are generated and distributed to customers. For example, gift card programs and loyalty programs are configured through Card Definitions.

About this Chapter

This chapter includes the following information:

- "Card Definitions Page" on page 461 - Describes the Card Definitions page and its associated Layer List.
- "Card Definition" on page 463 - Describes Card Definitions and the procedures for managing them.
- "Create New Card Definition" on page 471 - Provides the procedure for creating a new Card Definition.
- "Card Series Distribution" on page 475 - Describes Card Series Distributions and the procedures for managing them.

Programs

Programs are closely related to Card Definitions; you can access Programs through the Card Definitions interface. For information about Programs, see Chapter 17, "Programs" on page 484.

Card Definitions Page

The Card Definitions page is used to search for Card Definitions that can then be viewed or managed, or create a new Card Definition. This page is accessed by selecting the **Account->Card Definition** menu option, or by clicking the **Card Definition** Link on the Main Page.

The Card Definition page displays a Layer List containing all the Card Definitions that have been created in the system.

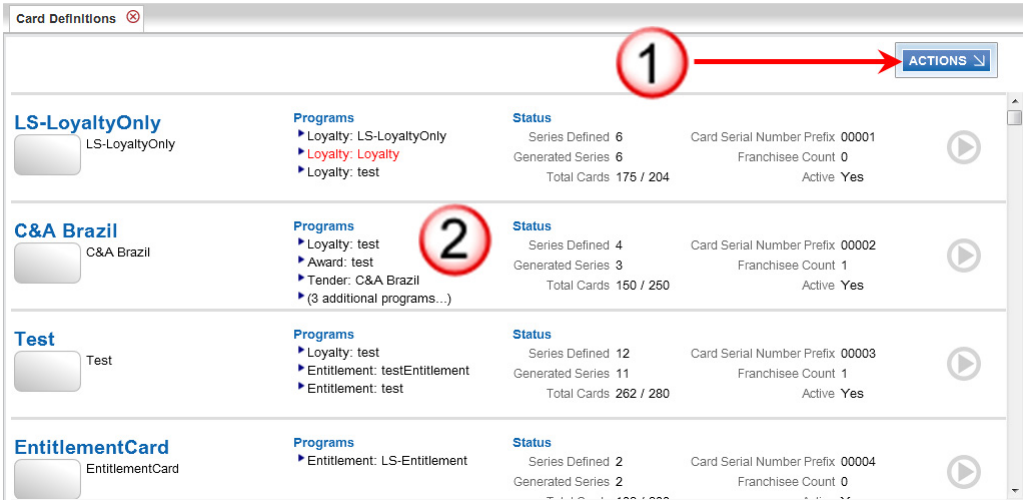


Figure 16-1: Card Definitions Page

Table 16-1: *Card Definitions List Page Key*

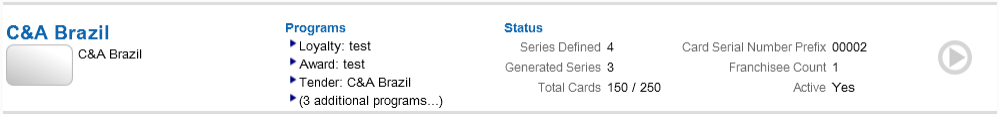
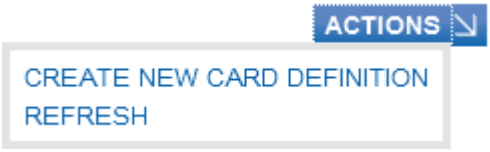
Item	Description
1	**Actions Menu** - Click to open a menu of actions that can be performed in the Card Definitions Layer List page.
2	**Card Definitions Layer List** - A Layer List of Card Definitions currently in the system. The following information is displayed for each Card Definition:  *Figure 16-2: Card Definition in Layer List* ■ The name of the Card Definition. ■ A description of the Card Definition. ■ **Programs** - A list of Programs associated with the Card Definition. *Inactive Programs are displayed in red.* Each Program is listed in the format `[Program Type]:[Program Name]`.

Table 16-1: *Card Definitions List Page Key (continued)*

Item	Description
2 (cont'd)	■ **Status** - This area displays the following information about the Card Definition: ❑ **Series Defined** - Number of Card Series Distribution(s) configured for the Card Definition. ❑ **Generated Series** - Number of Card Series Distribution(s) generated for the Card Definition. ❑ **Total Cards** - Total number of cards generated for the Card Definition. ❑ **Card Serial Number Prefix** - Prefix used on Serial Numbers for Cards in the Card Definition. ❑ **Franchisee Count** - Number of Franchisees associated with the Card Definition. **See also:** The *Relate Configuration Guide* for more information about Franchisees. ❑ **Active** - Indicates whether the Card Definition is currently active.

Actions Menu

The Actions Menu for the Card Definitions page contains the following action:



- **CREATE NEW CARD DEFINITION** - Create a new Card Definition. See "Create New Card Definition" on page 471 for a description of this procedure.
- **REFRESH** - Refresh/Reload the Layer List of Card Definitions.

Open Card Definition

Click a Card Definition in the Card Definitions Layer List to open the Definition in a Card Definition page.

Card Definition

A Card Definition page displays information about a Card Definition in a Layer List that provides access to pages where information about the Card Definition can be viewed and updated. Card Definition pages can be accessed through the Card Definitions Page.

Each Card Definition page displays the information described below.

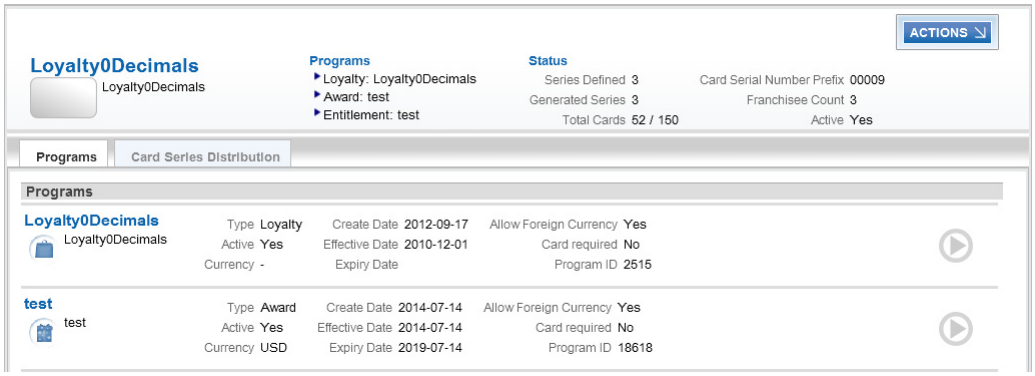


Figure 16-3: Card Definition Page

Card Definition Basics

This area is displayed at all times for each Card Definition and contains the following information:

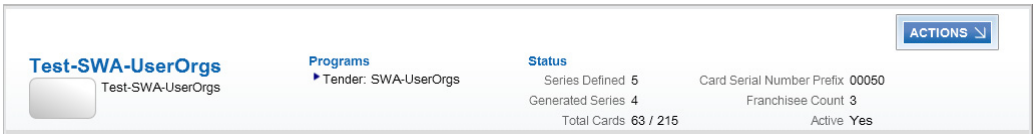


Figure 16-4: Card Definition Basics

- **Card Definition Name** - The name of the Card Definition.
- **Programs** - The Programs associated with the Card Definition.
- **Status** - The current status of the Card Definition. This includes the following:
  - **Series Defined** - The number of Card Series Distributions defined for this Card Definition.
  - **Generated Series** - The number of Card Series Distributions for this Card Definition that have had Cards generated.
  - **Total Cards** - The total number of Cards for this Card Definition (includes generated and non-generated Card Series Distributions).
  - **Card Prefix** - The Card Prefix used for this Card Definition.
  - **Franchisee Count** - The number of Franchisees associated with this Card Definition.
  - **Active** - Indicates whether the Card Definition is currently active.

To edit the information above, see "Edit Card Definition Basics" on page 467.

Each Card Definition includes Tabs for the elements that constitute a Card Definition; the Programs Tab for Program information and the Card Series Distribution Tab for Card Series Distribution information.

Programs Tab

The Programs Tab is a Layer List containing a listing for each Program in the Card Definition.

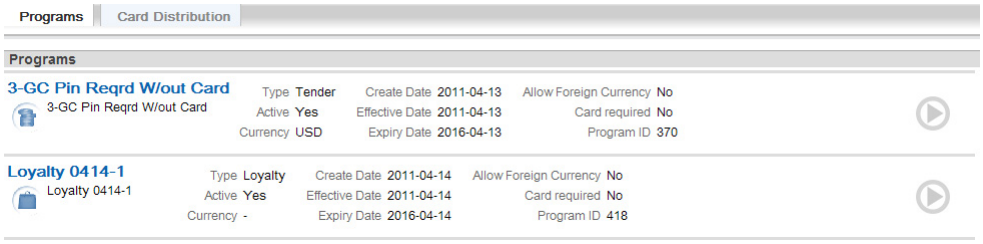


Figure 16-5: Programs Tab



For more information about Programs, see Chapter 17, "Programs" on page 484.

The following information is listed for each program:

- Name of the Program.
- Description of the Program.
- **Type** - Program Type. Can be Tender, Loyalty, Award, or Entitlement.
- **Active** - Indicates whether the Program is currently active.
- **Currency** - Currency code for the base currency used by the program.
- **Create Date** - Date on which the Program was created.
- **Effective Date** - Date on which the Program became effective.
- **Expiry Date** - Date on which the Program expires.
- **Allow Foreign Currency** - Indicates whether foreign currency transactions (i.e. transactions performed using a currency other than the base currency) can be applied to this Program.
- **Card Required** - Indicates whether the customer must present a Card during the transaction for the transaction to be applied to the Program.
- **Program ID** - ID of the program.

Card Series Distribution Tab

The Card Series Distribution tab is a Layer List containing a row for each Card Series Distribution in the Card Definition.

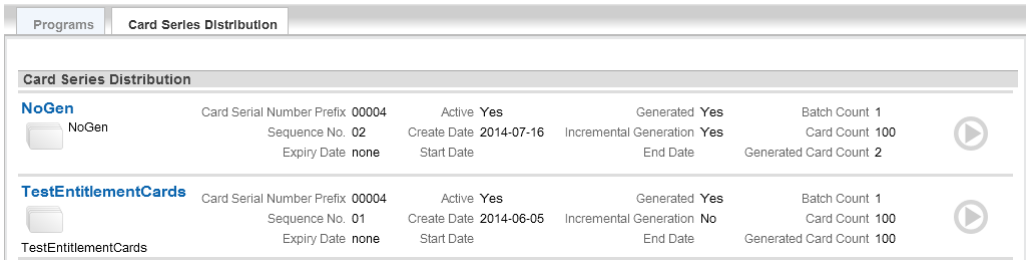


Figure 16-6: Card Series Distribution Tab

The following information is displayed for each Card Series Distribution:

- **Card Serial Number Prefix** - Serial Number Prefix for the Card Series.
- **Sequence No.** - Number indicating the sequence in which the Card Series were created.
- **Expiry Date** - Date the Cards in the Series expire.
- **Active** - Indicates whether the Card Series Distribution is currently active.
- **Create Date** - Date on which the Card Series Distribution was created.
- **Start Date** - Date on which the Card Series Distribution was first enabled.
- **Generated** - Indicates whether the Cards in this Distribution have been generated.
- **Incremental Generation** - Indicates whether new Cards will be generated one at a time on demand from the POS (**Yes**), or if the Cards are generated all at once (**No**).

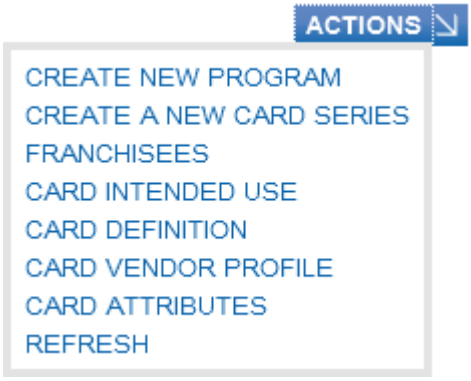


Generally, Cards that are generated incrementally are mailed to customers, while Cards that are generated all at once are given to customers immediately at the POS.

- **End Date** - Date on which the Card Series Distribution is no longer enabled.
- **Batch Count** - Total number of batches in this Distribution.
- **Card Count** - Total number of Cards in all the batches in this Distribution.
- **Generated Card Count** - Number of Cards generated by the Series.

Actions Menu

The Actions Menu for the Card Definition page has the following options:



- **CREATE NEW PROGRAM** - Create a new Program for the Card Definition. See "Create New Program" on page 519 for more information.
- **CREATE A NEW CARD SERIES** - Create a new Series for the Card Definition. See "Create a Card Series Distribution" on page 477 for more information.
- **FRANCHISEES** - View or edit the Franchisees associated with the Card Definition. See "View/ Edit Franchisees" on page 470 for more information.

> *This option is only present if Enable Franchise Support is set to* **Yes** *in Conflate. See the Relate Configuration Guide for more information.*

- **CARD INTENDED USE** - Determine the intended use for the Card Definition. See "Edit Card Intended Use" on page 467 for more information.

> *This option is only present if Enable Card Intended Use is set to* **Yes** *in Conflate. See the Relate Configuration Guide for more information.*

- **CARD DEFINITION** - Edit the Card Definition Basics for the Card Definition. See "Edit Card Definition Basics" on page 467 for more information.
- **CARD VENDOR PROFILE** - Edit the Vendor Data for the Card Definition. See "Edit Card Vendor Data" on page 469 for more information.
- **CARD ATTRIBUTES** - Edit the Attributes for the Card. See "Edit Card Attributes" on page 468 for more information.
- **REFRESH** - Refresh/Reload the Card Definition.

Edit Card Intended Use

Intended Use information can only be edited before Cards are generated for the Card Definition. After generating cards, you cannot change the information.

To edit the intended use for a Card Definition:

1. In the Actions Menu, click **CARD INTENDED USE**.

   The Edit Card Intended Use screen opens.



Figure 16-7: Edit Card Intended Use

2. Select the **Intended Use** for the Card in the Selection Menu.
3. Click **Save** to save the settings and return to the Card Definition, or click **Cancel** to discard the changes and return to the Card Definition with its current settings.

Edit Card Definition Basics

Card Definition information can only be edited before Cards are generated for the Card Definition. After generating Cards, you cannot change the information.

To edit the basic information for a Card Definition:

1. In the Actions Menu, click **CARD DEFINITION**.

   The Edit Card Definition Basics screen opens.

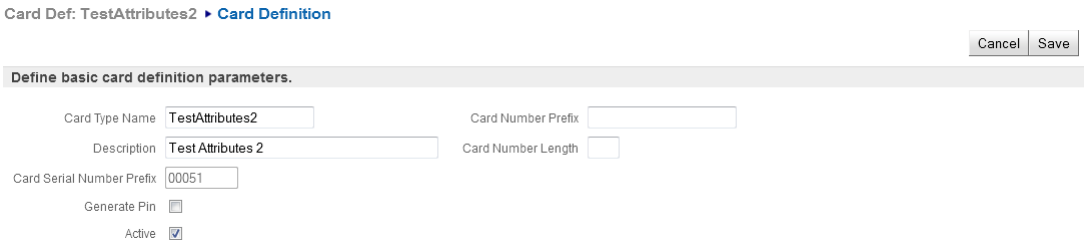


Figure 16-8: Edit Card Definition Basics

2. Make changes to the basic Card definition parameters:
   - **Card Type Name** - Name of the Card Definition.
   - **Description** - A description of the Card Definition.
   - **Card Number Prefix** - Prefix used by the Card Numbers for the Card Definition.

- **Card Number Length** - Length of the Card Number (included the Card Prefix).

> *As you enter Card Number Prefix and Card Number Length information, Relate displays the maximum number of cards that can be created for the card definition.*
>
> The maximum number of cards that can be created is 1000000000000

- **Card Serial Number Prefix** - **The Card Serial Number Prefix is fixed and cannot be changed.**
- **Generate Pin** - A Check Box indicating whether Relate will generate PINs for the Cards.
  - **Checked** - Relate will generate a PIN for each Card.
  - **Unchecked** - PINs will not be generated.
- **PIN Length** - The length of each PIN. (This field is only visible if the **Generate Pin** Check Box is checked).

  Enter **0** **[DEFAULT]** for Cards that will not have PINs.
- **PIN Required** - For each Check Box, indicate whether a PIN is required for that situation. (These fields are only visible if the **Generate Pin** Check Box is checked.)
  - **Always** - A customer must enter a PIN every time their Card is used.
  - **Without Card** - A customer must enter a PIN if they do not have their Card.
- **Active** - Determines whether the Card Definition is active upon creation.

3. Click **Save** to save the settings and return to the Card Definition, or click **Cancel** to discard the changes and return to the Card Definition with its current settings.

Edit Card Attributes

To edit the Attributes for a Card:

1. In a Card Definition page, click **CARD ATTRIBUTES** in the Actions Menu.

   The Card Attributes screen opens.

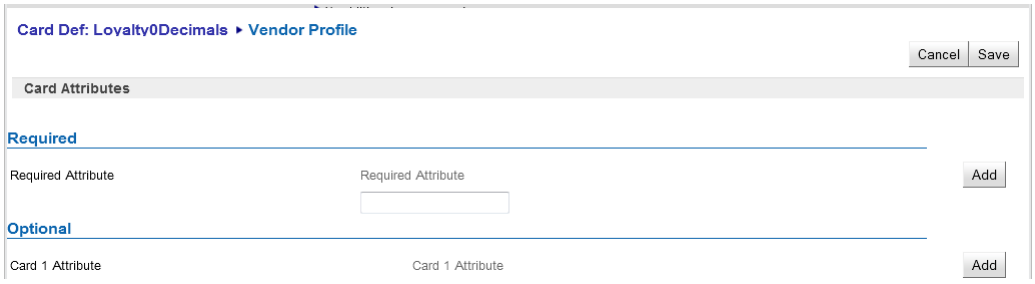


Figure 16-9: Card Attributes Screen

2. If necessary, make changes to the proper attributes:
   a. Click the **Add** button.

A configuration field opens.

b. Select or enter the configuration value for the Attribute.

c. Repeat until all necessary Attribute(s) are configured.

3. Click **Save** to save the changes and return to the Card Definition page, or click **Cancel** to discard the changes and return to the Card Definition page.

Edit Card Vendor Data

To update Card Vendor Data for the Cards generated for a Card Definition:

1. In a Card Definition page, click **CARD VENDOR PROFILE** in the Actions Menu.

The Card Vendor Profile screen opens.

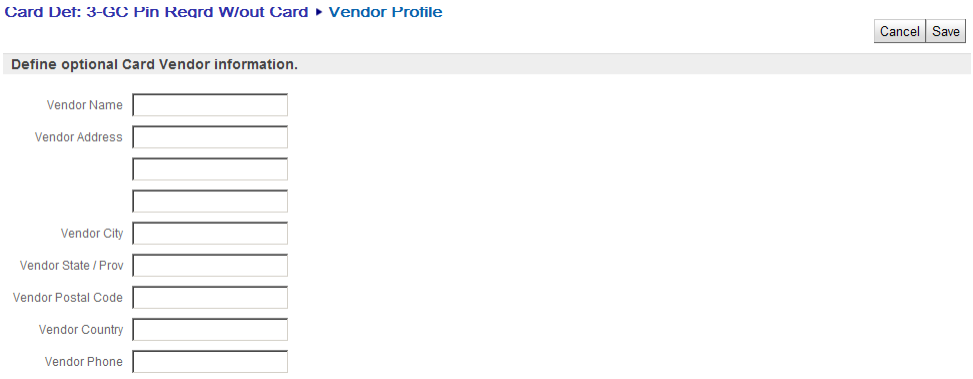


Figure 16-10: Card Vendor Profile Screen

2. Update the information in each Text Field:

- **Vendor Name** - Name of the vendor.
- **Vendor Address** - Address lines 1-3 for the vendor.
- **Vendor City** - City where the vendor is located.
- **Vendor State/Prov** - State or province in which the vendor is located.
- **Vendor Postal Code** - Postal Code or ZIP Code for the vendor.
- **Vendor Country** - Country where the vendor is located.
- **Vendor Phone** - Phone number of the vendor.

3. Click **Save** to save the changes and return to the Card Definition page, or click **Cancel** to discard the changes and return to the Card Definition page.

View/Edit Franchisees

See also: The *Relate Configuration Guide* for more information about Franchisees and their configuration.

To view or edit the Franchisees associated with the Card Definition, click **FRANCHISEES** in the Actions Menu on the Card Definition page.

The Franchisees screen opens.

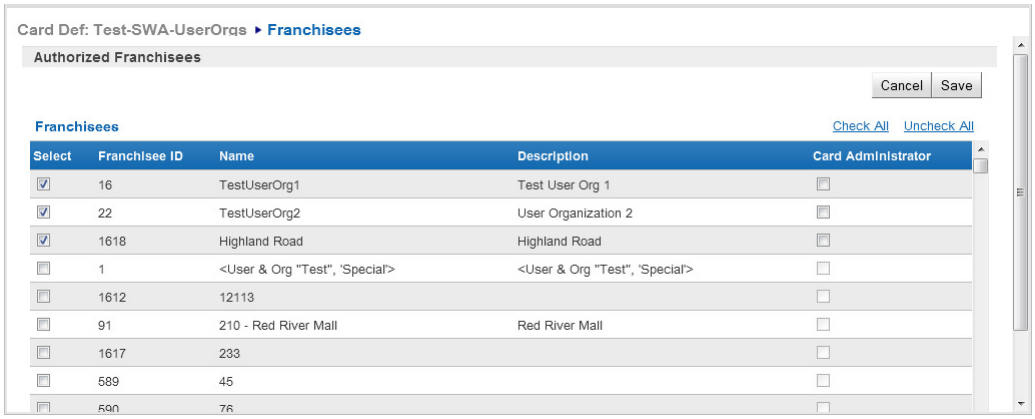


Figure 16-11: Franchisees Screen

Edit Franchisees

To modify the Franchisees associated with a Card Definition:

1. In the Franchisees List, use the **Select** Check Box for each Franchisee to determine whether the Franchisee will be associated with the Card Definition.
   - ❑ **Checked (☑)** - The Franchisee will be associated with the Card Definition.
   - ❑ **Unchecked (☐)** - The Franchisee will not be associated with the Card Definition.



Click the **Check All** *Link to include all Franchisees in the Card Definition.*

2. Use the Card Administrator Check Box for each Franchisee to determine whether the Franchisee will have Card Administrator privileges for the Card Definition.
   - ❑ **Checked (☑)** - The Franchisee will be a Card Administrator for the Card Definition.
   - ❑ **Unchecked (☐)** - The Franchisee will not be a Card Administrator for the Card Definition.
3. Click **Save** to save the new configuration and return to the Card Definition, or click **Cancel** to return to the Card Definition without saving the changes.

Create New Card Definition

Perform the following procedure to create a new Card Definition:

1. Click **CREATE NEW CARD DEFINITION** in the Actions Menu for the Card Definitions Page.

   The Create Card Definition Wizard opens. Depending upon the configuration of the Enable Card Intended Use configuration in Conflate, the Create Card Definition Wizard will open to one of two steps:

   - ❑ If the Card Intended Use step opens, continue with the next step.
   - ❑ If the Card Profile step opens, continue with step 4.

See also: The *Relate Configuration Guide* for more information about Conflate and the Enable Card Intended Use configuration.

2. In the Card Intended Use step, select the Intended Use for the Card.

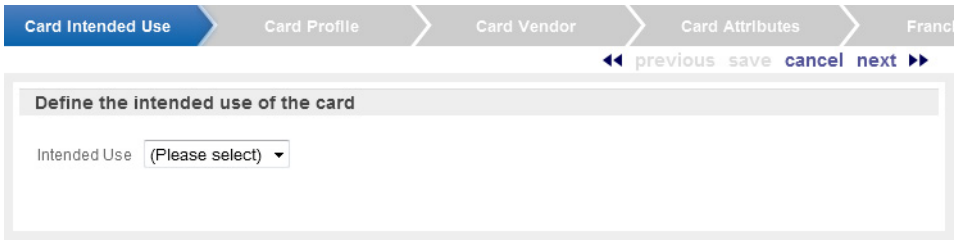


Figure 16-12: Card Intended Use Step

3. Click **next**.
4. In the Card Profile step, enter the Card information:

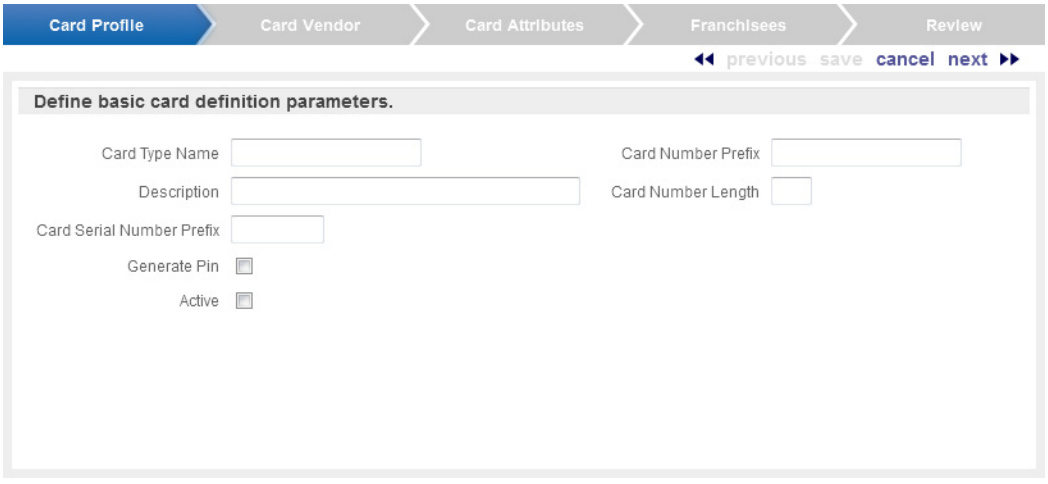
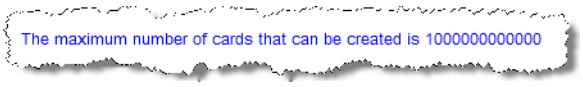


Figure 16-13: Create Card Definition Wizard

- ❑ **Card Type Name** or **Entitlement Package Name**- Name of the Card Definition.

- **Description** - A description of the Card Definition.
- **Card Number Prefix**- The Prefix used for the Card Number for this Card Definition.
- **Card Number Length** - The number of digits in the Card Number (including the Prefix).

As you enter Card Number Prefix and Card Number Length information, Relate displays the maximum number of cards that can be created for the card definition.



- **Card Serial Number Prefix** or **Entitlement Package ID**- Prefix used by the serial numbers for the Card Definition.

Once the Card Definition is saved, the Card Serial Number Prefix cannot be changed. Do not save the Card Definition unless you know that the Card Serial Number Prefix you are entering is correct.

- **Generate Pin** - A Check Box determining whether Relate will generate PINs for the Cards.
  - **Unchecked** - **[DEFAULT]** PINs will not be generated.
  - **Checked** - Relate will generate a PIN for each Card.

    When this option is checked, the **PIN Length** and **PIN Required** fields open.

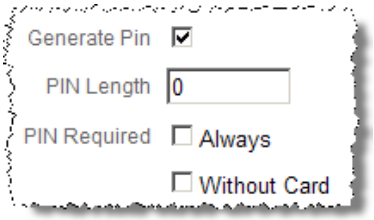


Figure 16-14: Generate Pin Check Box Checked

  - **PIN Length** - The length of each PIN. *This field is only displayed if the Generate Pin Check Box has a check mark (☑) in it.*

    This value must be less than or equal to **8**.
  - **PIN Required** - Enter a check mark (☑) in the Check Box indicating when a PIN is required. Only one Check Box can be selected. *These fields are only displayed if the Generate Pin Check Box has a check mark (☑) in it.*

    Always - A customer must enter a PIN every time their Card is used. **[DEFAULT]** Unchecked/Not Required.

    Without Card - A customer must enter a PIN if they do not have their Card. **[DEFAULT]** Unchecked/Not Required.

- **Active** - Determines whether the Card Definition will be active upon creation. **[DEFAULT]** Unchecked/Not Active.

5. Click **next** when you have finished entering information.

   The Card Vendor step is displayed.

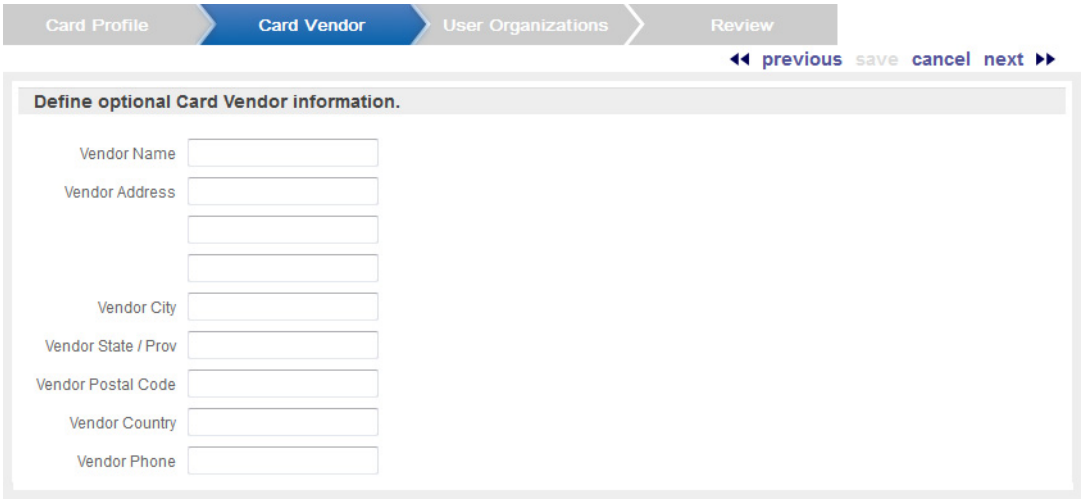


Figure 16-15: Card Vendor Step

6. In the Card Vendor step, enter the vendor information:
   - **Vendor Name** - Name of the Card vendor.
   - **Vendor Address** - Address lines 1-3 for the Card vendor.
   - **Vendor City** - City of the vendor.
   - **Vendor State/Prov** - State or province of the vendor.
   - **Vendor Postal Code** - Postal Code (ZIP Code) of the vendor.
   - **Vendor Country** - Country of the vendor.
   - **Vendor Phone** - Phone number of the vendor.
7. Click next when you have finished entering information.

   The Card Attributes step opens.

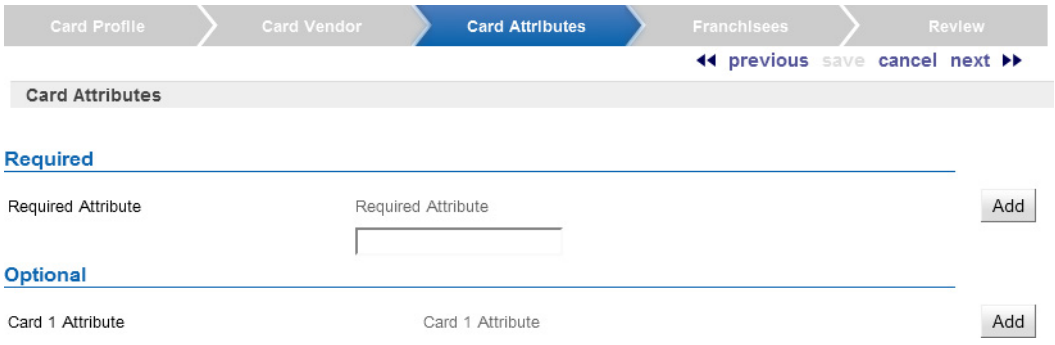


Figure 16-16: Card Attributes Step

a. Select or enter the configuration values for each of the **Required** Attributes.

b. Add any necessary **Optional** Attribute(s):

1) Click the proper **Add** button.

A configuration field opens.

2) Select or enter the configuration value for the Attribute.

3) Repeat until all necessary Attribute(s) are configured.

c. To remove an Attribute, click the **Delete** button for that Attribute.

The Attribute is deleted.

8. When you have completed configuring the Attributes, click **next** to continue.

- ❑ If Franchises are enabled on your system, the Franchisee step opens. Continue with step 9.
- ❑ If Franchises are not enabled on your system, the Review step opens. Continue with step 11.

See also: The *Relate Configuration Guide* for more information about Franchisees and their configuration.

9. Determine the Franchisees to associate with the Card Definition.

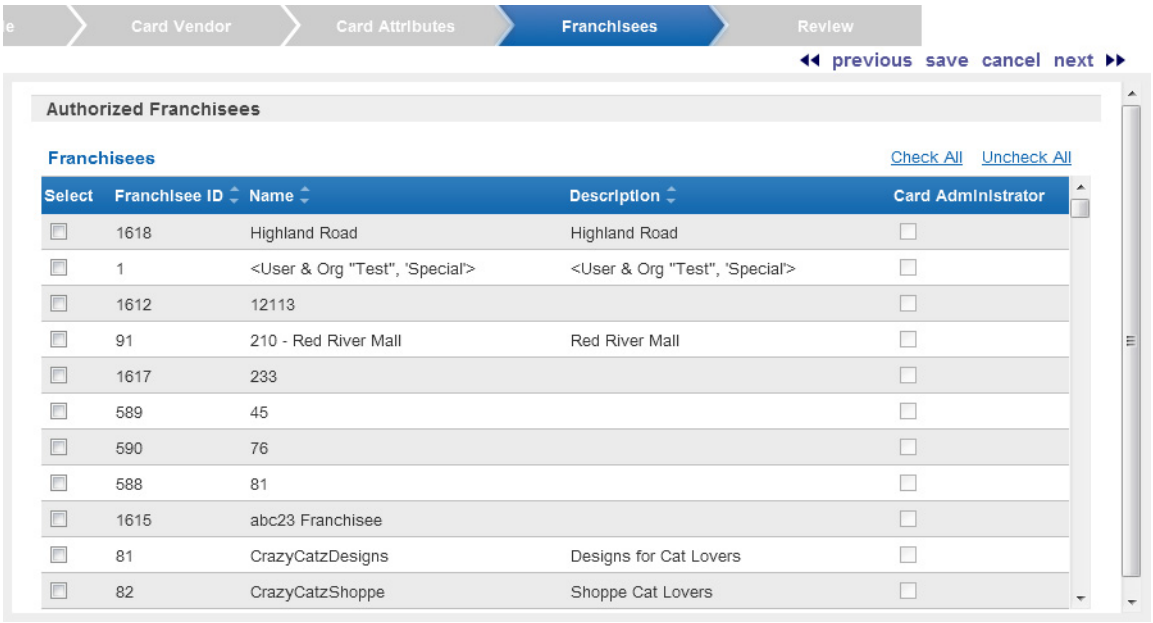


Figure 16-17: Franchisees Step

- ❑ To associate the Card Definition with all Franchisees, do not select any Franchisees.
- ❑ If only a subset of Franchisees will be associated with the Card Definition, select the Check Box for each Franchisee to be included.

- ❑ Click **Select All** to select all the current Franchisees.
- ❑ Click **Uncheck All** to unselect all selected Franchisees.

10. Click **next** when you have finished configuring the Franchisees.

The Review step opens.

11. Review the entered information to ensure that it is correct.

- ❑ Click **save** to save the Card Definition with the current settings and return to the Card Definitions Page.
- ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
- ❑ Click **cancel** to delete all information and return to the Card Definitions Page.

After saving the Card Definition, the Card Definition is created. However, there are additional processes that must be performed before the Card Definition is ready.

12. Complete the Card Definition by performing the following procedures:

- ❑ "Create New Program" on page 519
- ❑ "Create a Card Series Distribution" on page 477
- ❑ "Edit Card Vendor Data" on page 469

Card Series Distribution

A Card Series Distribution is a set of Cards distributed as part of a Card Definition. Each Card Series Distribution contains one or more batches of Cards to be generated and then distributed to Customers. Each Card Definition can have multiple Card Series Distributions, and each Card Series Distribution can have multiple batches.

Open a Card Series Distribution

To access a Card Series Distribution, click the Series in the Card Series Distribution Tab. The Distribution is opened in the Card Series Distribution screen.

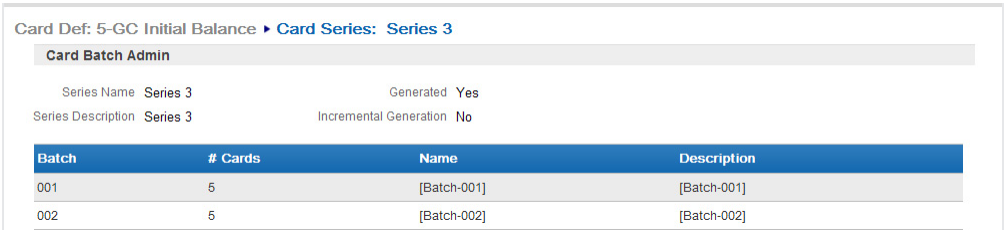


Figure 16-18: Card Series Distribution Screen

The following information is displayed for each open Card Series Distribution:

- **Series Name** - Name of the Card Series Distribution.
- **Series Description** - Description of the Card Series Distribution.
- **Generated** - Indicates whether the Card Series Distribution has been generated.
- **Incremental Generation** - Indicates whether the Card Series Distribution was generated through a Generate Card message.

- **Batch List** - A List of Batches associated with the Distribution.

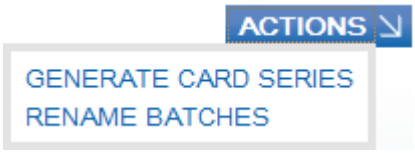
  The following information is displayed for each Batch:

  - **Batch** - The Batch Number.
  - **# Cards** - The number of Cards in the Batch.
  - **Name** - Name of the Batch.
  - **Description** - Description of the Batch.

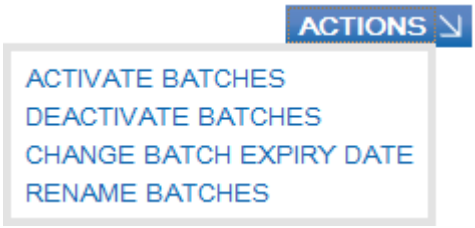
Actions Menu

The Actions Menu for each Card Series Distribution has the following options:

> *The options displayed will depend upon the current status of the Card Series Distribution.*



- **GENERATE CARD SERIES** - Generate Cards for the Batch (see "Generate Cards" on page 479 for more information).
- **ACTIVATE BATCHES** - Activates Cards by Batch or by Card number range (see "Activate Cards" on page 479).
- **DEACTIVATE BATCHES** - Deactivates Cards by Batch or by Card number range (see "Deactivate Cards" on page 480).
- **CHANGE BATCH EXPIRY DATE** - Changes the expiration date for Cards by Batch or by Card number range (see "Change Batch Expiration Date" on page 481).



- **RENAME BATCHES** - Changes the name of Card Batches (see "Rename Card Series Batches" on page 483).

Create a Card Series Distribution

To add a Card Series Distribution to a Card Definition:

1. In the Actions Menu for a Card Definition, select **CREATE A NEW CARD SERIES**.

> *If there are no Card Series Distributions defined for the Card Definition, Relate provides a* **Click Here** Link *for adding a Distribution.*

The Create New Card Series Distribution Wizard opens with the Series Definition step.

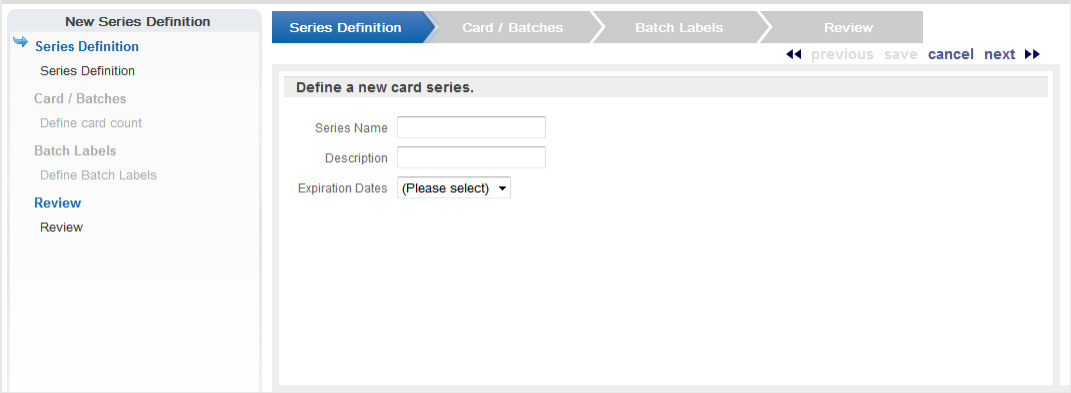
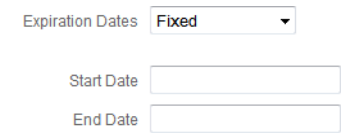


Figure 16-19: Create New Card Series Distribution Wizard

2. Enter the information for the Card Series Distribution:

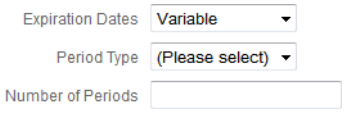
- **Series Name** - Name of the Card Series Distribution.
- **Description** - Description of the Card Series Distribution.
- **Expiration Dates** - Determines the type of expiration date to use for the Card Series Distribution. This Selection Menu has the following options:
  - **Fixed** - Beginning and ending expiration dates will be defined by the User.

    If this option is selected, the **Start Date** and **End Date** fields are displayed.

  - **Variable** - The ending expiration date will be a certain, defined period of time after the initial activation date.

    If this option is selected, the Period Type and Number of Periods fields are displayed.

  - **None** - The beginning and ending expiration date will be defined by the Program.
- **Start Date** - This Calendar Menu determines the first date on which the Cards will be active. *This field is only displayed if* ***Fixed*** *Expiration Dates are selected.*
- **End Date** - This Calendar Menu determines the last date on which the Cards will be active. *This field is only displayed if* ***Fixed*** *Expiration Dates are selected.*

- **Period Type** - This Selection Menu determines the type of time period used to determine the expiration date of the Cards. *This field is only displayed if* ***Variable*** *Expiration Dates are selected.*
- **Number of Periods** - The number of time periods after the activation date that the Cards expire. *This field is only displayed if* ***Variable*** *Expiration Dates are selected.*

3. Click **next** to continue.

The Card/Batches step opens.



Figure 16-20: Card/Batches Step

4. Enter the Card and Batch number information:

- **Number of Cards** - The total number of Cards in the Card Series Distribution (the total for all batches).
- **Number of Batches** - The number of separate Card batches included in the Card Series Distribution.

5. Click **next** to continue.

The Batch Labels step opens.

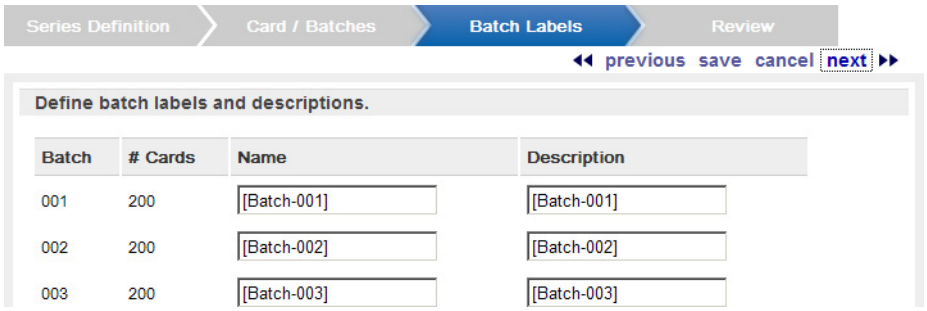


Figure 16-21: Batch Labels Step

6. If necessary, edit the following information for each batch in the Card Series Distribution:

- **Name** - Name of the batch.
- **Description** - Description of the batch.



The Batch ID and Number of Cards (Batch and # Cards columns) cannot be edited. These are configured automatically by Relate and cannot be changed.

7. Click **next** to continue.

The Review step opens.

8. Review the entered information to ensure that it is correct.
   - ❑ Click **save** to save the Card Series Distribution with the current settings and return to the Card Definition page.
   - ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
   - ❑ Click **cancel** to delete all information and return to the Card Definition page.

Generate Cards

To generate a set of Cards within a Card Definition:

1. Open the Card Series Distribution (see "Open a Card Series Distribution" on page 475).
2. Click **GENERATE CARD SERIES** in the Actions Menu.

   A notification message is displaying, indicating that a Generate Cards Job has been submitted. See Chapter 22, "Process Queue" on page 608 for more information.



Activate Cards

To activate a set of Cards within a Card Definition:

1. Open the Card Series Distribution (see "Open a Card Series Distribution" on page 475).
2. Click **ACTIVATE BATCHES** in the Actions Menu.

   An Activate Card Series Batches Window opens.

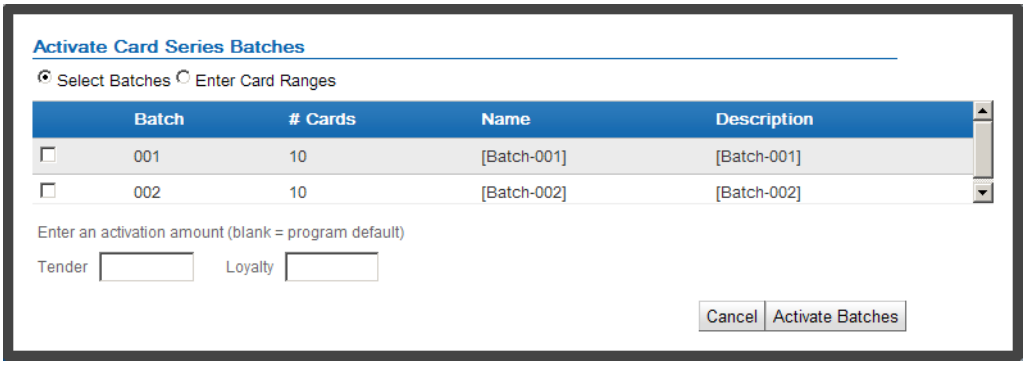


Figure 16-22: Activate Card Series Batches

3. Select the method for activating Cards in the Radio Buttons:
   - ❑ **Select Batches** - Activate Card Series by batch.

     If you select this option, a List of batches is displayed. Do the following:

     - ❍ Put a check mark (☑) in the Check Box for each Batch that is being activated.
   - ❑ **Enter Card Ranges** - Activate a range of Card numbers regardless of batch.

If you select this option, one Text Field is displayed for the beginning and one for the end of the Card range. Each Text Field is preceded by the Card Prefix. Do the following:

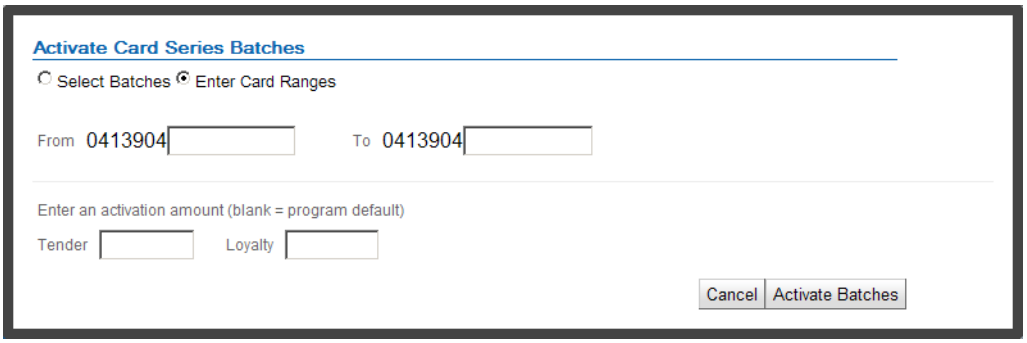


Figure 16-23: Activate Card Series Batches by Card Range

1) In the **From** Text Field, enter the first Card serial number (without the prefix) to be activated.

2) In the **To** Text Field, enter the last Card serial number (without the prefix) to be activated.

4. If the Cards in the Batch will have an initial value other than the default, enter that value into the **Enter an activation amount** Text Field.

To use the default activation amount, leave the field blank.

5. Click **Activate Batches** to activate the selected Cards and return to the Card Series Distribution, or click **Cancel** to discard the information and return to the Card Series Distribution.

Deactivate Cards

To deactivate a set of Cards within a Card Definition:

1. Open the Card Series Distribution (see "Open a Card Series Distribution" on page 475).

2. Click **Deactivate Batches** in the Actions Menu.

An Deactivate Card Series Batches Window opens.

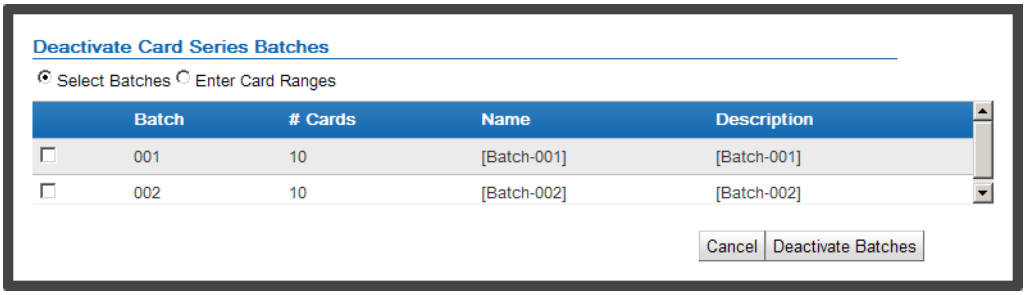


Figure 16-24: Deactivate Card Series Batches Window

3. Select the method for deactivating Cards in the Radio Buttons:

- **Select Batches** - Deactivate Card series by batch.

If you select this option, a List of batches is displayed. Do the following:

- Put a check mark (☑) in the Check Box for each Batch that is being deactivated.

- **Enter Card Ranges** - Deactivate a range of Card numbers regardless of batch.

  If you select this option, one Text Field is displayed for the beginning and one for the end of the Card range. Each Text Field is preceded by the Card Prefix. Do the following:

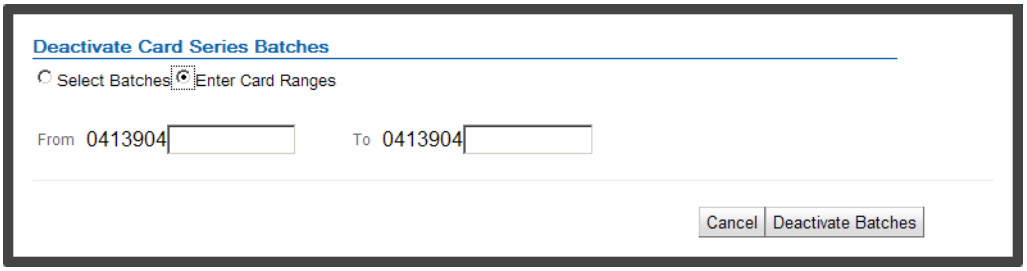


Figure 16-25: Deactivate Card Series Batches by Card Range

1) In the **From** Text Field, enter the first Card serial number (without the prefix) to be deactivated.

2) In the **To** Text Field, enter the last Card serial number (without the prefix) to be deactivated.

4. Click **Deactivate Batches** to deactivate the selected Cards and return to the Card Series Distribution, or click **Cancel** to discard the information and return to the Card Series Distribution.

Change Batch Expiration Date

To change the expiration dates for a set of Cards within a Card Definition:

1. Open the Card Series Distribution (see "Open a Card Series Distribution" on page 475).

2. Click **Change Batch Expiry Date** in the Actions Menu.

An Change Batch Expiry Date Window opens.

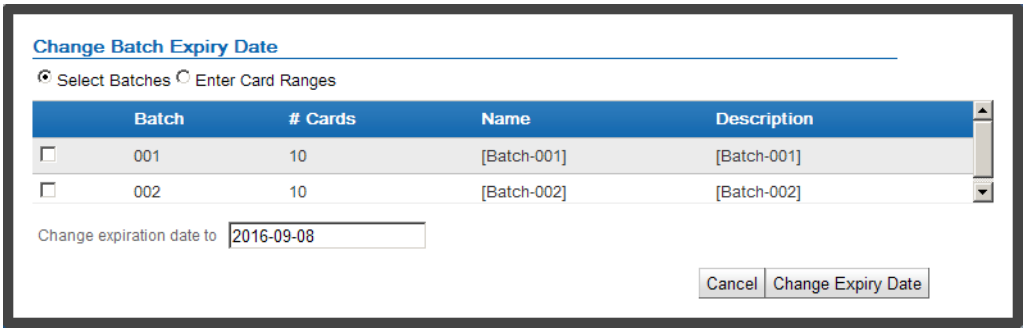


Figure 16-26: Change Batch Expiry Date Window

3. Select the method for changing the expiry date of the Cards in the Radio Buttons:

- **Select Batches** - Change the expiration date of batches of Cards.

If you select this option, a List of batches is displayed. Do the following:

- Select the Check Box for each Batch whose expiration date is being changed.

- **Enter Card Ranges** - Change the expiration date for a range of Card numbers regardless of batch.

  If you select this option, one Text Field is displayed for the beginning and one for the end of the Card range. Each Text Field is preceded by the Card Prefix. Do the following:

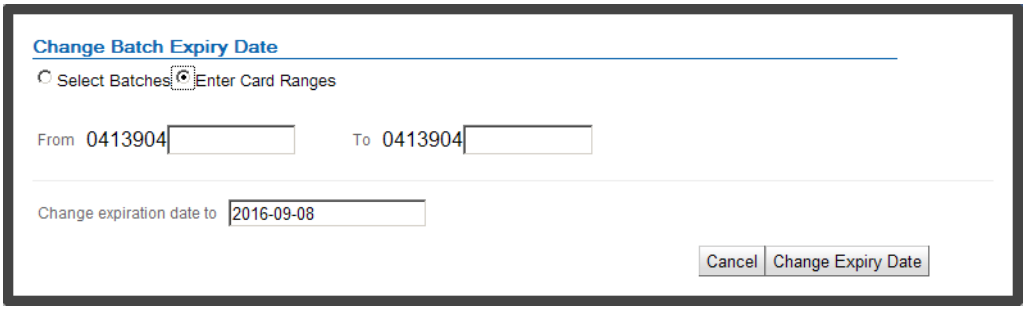


Figure 16-27: Change Batch Expiry Date by Card Range

1) In the **From** Text Field, enter the first Card serial number (without the prefix) whose expiration date is changing.

2) In the **To** Text Field, enter the last Card serial number (without the prefix) whose expiration date is changing.

4. Select the new expiration date in the **Change expiration date to** Calendar Menu.

5. Click **Change Expiry Date** to change the expiration date for the selected Cards and return to the Card Series Distribution, or click **Cancel** to discard the information and return to the Card Series Distribution.

Rename Card Series Batches

To change the name of a Batch within a Card Definition:

1. Open the Card Series Distribution (see "Open a Card Series Distribution" on page 475).
2. Click **Rename Batches** in the Actions Menu.

   A Rename Card Series Batches Window opens.

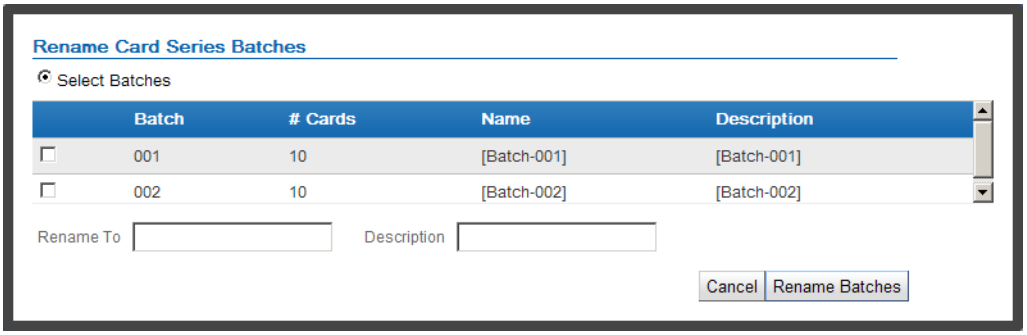


Figure 16-28: Rename Card Series Batches Window

3. Put a check mark (☑) in the Check Box for each Batch whose name is being changed.
4. Enter the new name for the Batch(es) in the **Rename to** Text Field.
5. Enter a description of the Batch(es) in the **Description** Text Field.
6. Click **Rename Batches** to change the name for the Batch(es) and return to the Card Series Distribution, or click **Cancel** to discard the information and return to the Card Series Distribution.

CHAPTER 17

Programs

Overview

A Program is a set of rules and parameters that govern the behavior of an account and turn it into one of several basic program types: Tender, Loyalty, Award, and Entitlement.

Program Types

Relate has the following types of Programs:

- **Tender Program** - Tender Programs define rules for gift cards (or stored value cards).
- **Loyalty Program** - Loyalty Programs define the rules used for tracking the purchases of Customers belonging to location loyalty programs, usually through a system of "points". These points can then be redeemed for discounts of a fixed amount (though the points alone have no intrinsic value). The discounts can be distributed through the mail as paper coupons, or made available to customers as an E-Award coupon created by an Award Program.
- **Award Program** - Award Programs define E-Awards that are distributed to customers electronically. These awards are distributed as part of promotions such as birthday or anniversary awards, or they can be made available to customers who have accumulated a certain number of points as part of a Loyalty Program.
- **Entitlement Program** - Entitlement Programs provide limited, controlled access to promotional deals. The deals in an entitlement program can be limited to a certain number of overall redemptions, and/or limited to a certain number of redemptions within a defined period of time.

Open a Program

To open a Program within a Card Definition, open the Programs Tab in a Card Definition page. The Program will be opened in the Program screen.

> *For more information about opening a Card Definition to access a Program, see Chapter 16, "Card Definitions" on page 460 and the section "Programs Tab" on page 464.*

The information displayed for the Program will depend upon the type of Program. The information displayed for each Program type is described in the following sections:

- "Tender Program" on page 485
- "Award Program" on page 488
- "Loyalty Program" on page 490
- "Entitlement Program" on page 514

Tender Program

The following information is displayed for Tender Programs:



Figure 17-1: Tender Program Screen

- **General Program Information** - General information about the Program. This includes the following information:
  - **Program Name** - Name of the Program.
  - **Program Description** - Description of the Program.
  - **Start Date** - Date on which the Program starts.
  - **End Date** - Date on which the Program ends.
  - **Active** - Indicates whether the Program is currently active.
- **Tender Program Details** - Detailed information specific to Tender Programs. This includes the following information:
  - **Credit Reversal** - Indicates whether credit reversals are allowed by the Program.
  - **Debit Reversal** - Indicates whether debit reversals are allowed by the Program.

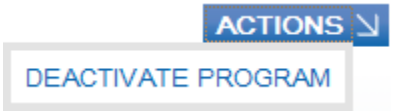
- **Card Required** - Indicates whether the customer must have the physical card present during the transaction to receive credit for the transaction.
- **Card Merge Permitted** - Indicates whether the Card can be merged with another Card.
- **Allow Foreign Currency** - Indicates whether foreign currency transactions (i.e. a transaction performed in a currency other than the base currency) are applied to the Program.
- **Currency** - The base currency for the Program.
- **Allow Cash Outs** - Indicates whether the Program allows accounts to be cashed out.
- **Cash Out Limit** - If cash out transactions are allowed, the maximum amount that can be cashed out in a transaction.
- **Account Level Expiration** - Indicates whether the account expires after a certain period of time.
- **Period Type** - If Account Level Expiration is set to Yes, indicates the type of period used for the Account Level Expiration Date.
- **Number of Periods** - If Account Level Expiration is set to Yes, determines the number of periods (from Period Type) that will pass before a Tender Account expires.

- **Tender Balances** - Balance information configured for the Tender Program. This includes the following information:
  - **Initial Account Balance** - Indicates whether there is an initial balance on each account.
  - **Initial Balance Amount** - If Initial Account Balance is set to Yes, the amount of the initial balance.
  - **Initial Book Value** - If Initial Account Balance is set to Yes, the initial book value of the account.
  - **Minimum Activation Amount** - The minimum amount that can be in an Account for it to be activated.
  - **Minimum Balance** - The minimum amount that must be kept in an Account.
  - **Maximum Balance** - The maximum amount that can be put into the Account.
- **Preauthorizations** - Whether and how pre-authorizations are configured in the Program. This includes the following information:
  - **Allow Pre-authorizations** - Indicates whether pre-authorizations are allowed for the Tender Accounts.
  - **Preauth Expirations** - If Preauth Expirations is set to Yes, indicates whether pre-authorizations expire.
  - **Expire Pre-authorizations after (Periods)** - If Allow Pre-authorizations and Preauth Expirations are both set to Yes, indicates the type of period used for the pre-authorization expiration.
  - **Number of Periods** - If Allow Pre-authorizations and Preauth Expirations are both set to Yes, determines the number of periods (from Expire Pre-authorizations after (Periods)) to pass, after which a pre-authorization expires.

- **Advanced Program Details** - Advanced configurations for the Program. This includes the following information:
  - **Allow Reloads** - Indicates whether a Tender Account can be reloaded.
  - **Allow Partial Redemption** - Indicates whether a balance on a Tender Account can be partially redeemed.
  - **Max Value of Redemptions per Business Day** - The total amount of all redemptions that can be performed on a Tender Account in one day.
  - **Max Daily Uses** - The total number of times that a Tender Account can be used in one day.
  - **Maximum lifetime uses** - The total number of times that a Tender Account can be used over the lifetime of the account.

Actions Menu

The Actions Menu for a Tender Program contains the following options:



- **DEACTIVATE PROGRAM** - Deactivate the Program (only available for active Programs).
- **ACTIVATE PROGRAM** - Activate the Program (only available for inactive Programs).



Edit a Tender Program

To edit a Tender Program:

1. Open the Tender Program in the Programs Tab for the Card Definition.
2. Click the **Edit Program** button next to the Actions Menu.



> *The Edit Program button will only be available if no Card Series Distributions have been generated for the associated Card Definition. If Cards have been generated, the Program cannot be changed.*

The Add Program Wizard opens with all fields populated with the current information for the Program.

3. Make changes to the Tender Program as described in "Create New Program" on page 519 and "Create a Tender Program" on page 520.

Award Program

The following information is displayed for Award Programs:



Figure 17-2: Award Program Screen

- **General Program Information** - General information about the Program. This includes the following information:
  - **Program Name** - Name of the Program.
  - **Program Description** - Description of the Program.
  - **Start Date** - Date on which the Program starts.
  - **End Date** - Date on which the Program ends.
  - **Active** - Indicates whether the Program is currently active.
- **Award Card Parameters** - Fundamental parameters for the Award Program. This includes the following information:
  - **Currency** - The base currency for the Program.
  - **Card Required** - Indicates whether the customer must have the physical card present during the transaction to receive credit for the transaction.

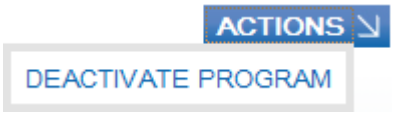
- **Card Merge Permitted** - Indicates whether the Card can be merged with another Card.
- **Allow Foreign Currency** - Indicates whether foreign currency transactions (i.e. a transaction performed in a currency other than the base currency) are applied to the Program.

- **Award Program Details** - Award Program balance and account level expiration configurations. This includes the following information:
  - **Account Level Expiration** - Indicates whether the account expires after a certain period of time.
  - **Period Type** - If Account Level Expiration is set to Yes, indicates the type of period used for the Account Level Expiration Date.
  - **Number of Periods** - If Account Level Expiration is set to Yes, determines the number of periods (from Period Type) that will pass before an Award Account expires.
  - **Initial Account Balance** - Indicates whether there is an initial balance on each account.
  - **Allow Reloads** - Indicates whether the Program allows accounts to be reloaded.
- **Award Expiration** - Expiration rules for awards. This includes the following information:
  - **Awards Will Be Expired** - Indicates the type of expiration rule used by the Program for award expiration:
    - **None** - Awards earned are retained until removed.
    - **Fixed** - If there is no account activity in the time specified, all awards are expired and balances reset to zero after a defined period of time.
    - **Rolling X** - The expiration date for awards is calculated from the business date they are earned. If these awards are not used, they are removed after a defined period of time, regardless of account activity.
  - **Award Expiration Period Type** - If Awards Will Be Expired is set to either Fixed or Rolling X, indicates the type of period used for the Account Level Expiration Date.
  - **Number of Periods** - If Awards Will Be Expired is set to either Fixed or Rolling X, determines the number of periods (from Period Type) that will pass before an award expires.

Actions Menu

The Actions Menu for an Award Program contains the following options:

- **DEACTIVATE PROGRAM** - Deactivate the Program (only available for active Programs).
- **ACTIVATE PROGRAM** - Activate the Program (only available for inactive Programs).





Edit an Award Program

To edit an Award Program:

1. Open the Award Program in the Programs Tab for the Card Definition.
2. Click the **Edit Program** button next to the Actions Menu.



> *The Edit Program button will only be available if no Card Series Distributions have been generated for the associated Card Definition. If Cards have been generated, the Program cannot be changed.*

The Add Program Wizard opens with all fields populated with the current information for the Program.

3. Make changes to the Award Program as described in "Create New Program" on page 519 and "Create an Award Program" on page 526.

Loyalty Program

The following information is displayed for Loyalty Programs:

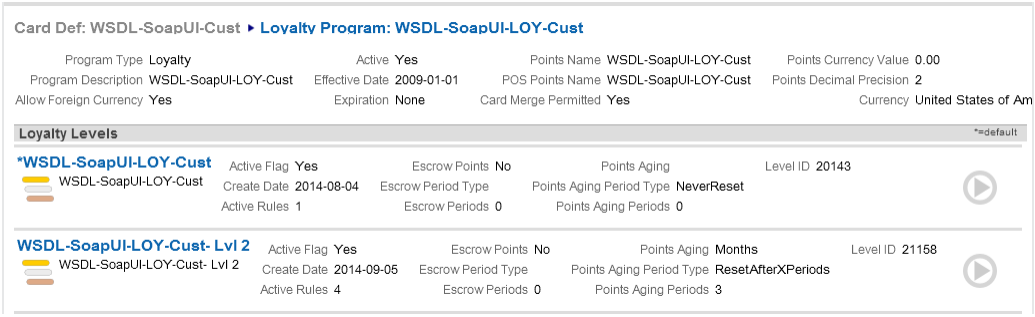


Figure 17-3: Loyalty Program Screen

- **Program Type** - The type of Program (i.e. Loyalty).
- **Program Description** - Description of the Program.
- **Allow Foreign Currency** - Indicates whether foreign currency transactions (i.e. a transaction performed in a currency other than the base currency) are applied to the Program.
- **Active** - Indicates whether the Program is currently active.
- **Effective Date** - Date on which the Program becomes effective.
- **Expiration** - Date on which the Program expires.
- **Points Name** - Name of the points used by the Program.
- **POS Points Name** - Name displayed for the points on the POS system.
- **Card Merge Permitted** - Indicates whether a Card in this Program can be merged with another Card.

- **Points Currency Value** - The currency amount required to earn one (1) point.
- **Points Decimal Precision** - The number of decimal points used in tracking points.
- **Currency** - The base currency for the Program.
- **Loyalty Levels** - A Layer List displaying information for each Level in the Loyalty Program.

  To open a Loyalty Level, click the Loyalty Level in the Layer List.

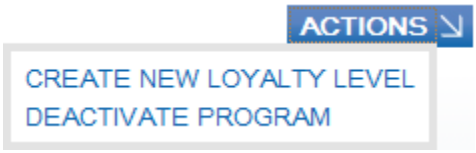
  The following information is displayed for each Level:

  - **Active Flag** - Indicates whether the Level is currently active.
  - **Create Date** - Date on which the Level was created.
  - **Active Rules** - The number of active rules associated with the Loyalty Level. This includes Issue Rules, Award Rules, and Movement Rules.
  - **Escrow Points** - Indicates whether points are escrowed before they become available for use as Earned Points.
    - **Yes** - Points are held as Escrow Points for a define period of time, after which they become available for use as Earned Points.
    - **No** - Points are immediately available for use as Earned Points.
  - **Escrow Period Type** - If Escrow Points is set to Yes, indicates the type of period used to determine the escrow time.
  - **Escrow Periods** - If Escrow Points is set to Yes, indicates the number of periods (from Period Type) that will pass before points are made available.
  - **Points Aging** - The method used for determining when points are reset:
    - **Never Reset** - Points earned are retained until removed by an awards process.
    - **Reset after x periods** - If there is no account activity in the time specified, all points (escrow, earned, and bonus) are expired and points balances reset to zero after a defined period of time.
    - **Reset after x rolling periods** - The expiration date for the points is calculated from the business date they are earned. If these points are not used, they are removed after a defined period of time, regardless of account activity.
  - **Points Aging Period Type** - If Points Aging is set to Reset after x periods or Reset after x rolling periods, indicates the type of period used for the Points Aging process.
  - **Points Aging Periods** - If Points Aging is set to Reset after x periods or Reset after x rolling periods, indicates the number of periods (from Points Aging Period Type) that will pass before points are reset.

Actions Menu

The Actions Menu for a Loyalty Program contains the following options:

- **CREATE NEW LOYALTY LEVEL** - Add a new Loyalty Level to the Program.
- **DEACTIVATE PROGRAM** - Deactivate the Program (only available for active Programs).
- **ACTIVATE PROGRAM** - Activate the Program (only available for inactive Programs).



Edit a Loyalty Program

To edit a Loyalty Program:

1. Open the Loyalty Program in the Programs Tab for the Card Definition.
2. Click the **Edit Program** button next to the Actions Menu.



> *The Edit Program button will only be available if no Card Series Distributions have been generated for the associated Card Definition. If Cards have been generated, the Program cannot be changed.*

   The Add Program Wizard opens with all fields populated with the current information for the Program.

3. Make changes to the Loyalty Program as described in "Create New Program" on page 519 and "Create a Loyalty Program" on page 523.

Loyalty Level

Loyalty Levels define a set of rules that determine how Loyalty Points are earned and managed. Every Loyalty Program must have at least one Loyalty Level, even if the Program is not a multi-level program.

Open a Loyalty Level

A Loyalty Level is opened by clicking on the Level in a Loyalty Program Layer List.

Each Loyalty Level displays a set of Tabs containing information about the Loyalty Level: Level Parameters Tab, Issue Rules Tab, Award Rules Tab, and Movement Rules Tab.

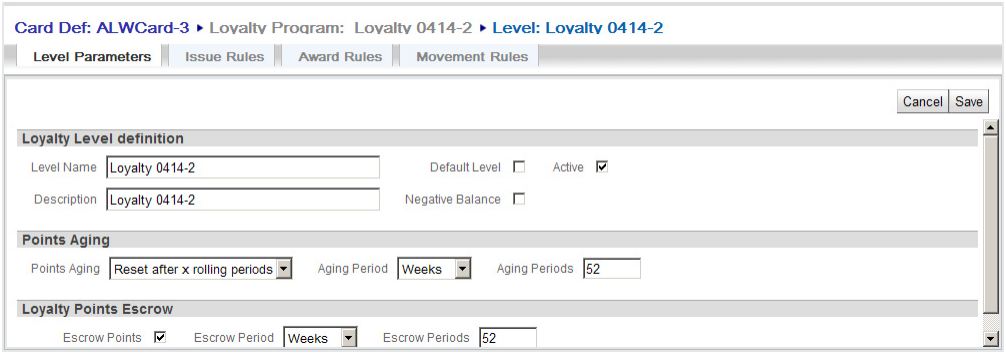
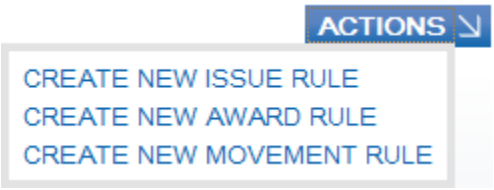


Figure 17-4: Loyalty Level Screen

Actions Menu

The Actions menu for each Loyalty Level has the following options:



- **CREATE NEW ISSUE RULE** - Creates a new Issue Rule. See "Add Issue Rule" on page 502 for more information.
- **CREATE NEW AWARD RULE** - Creates a new Award Rule. See "Add Award Rule" on page 509 for more information.
- **CREATE NEW MOVEMENT RULE** - Creates a New Movement Rule. See "Add Movement Rule" on page 513 for more information.

Level Parameters Tab

The Level Parameters tab allows users to view and edit the basic parameters of the Loyalty Level.

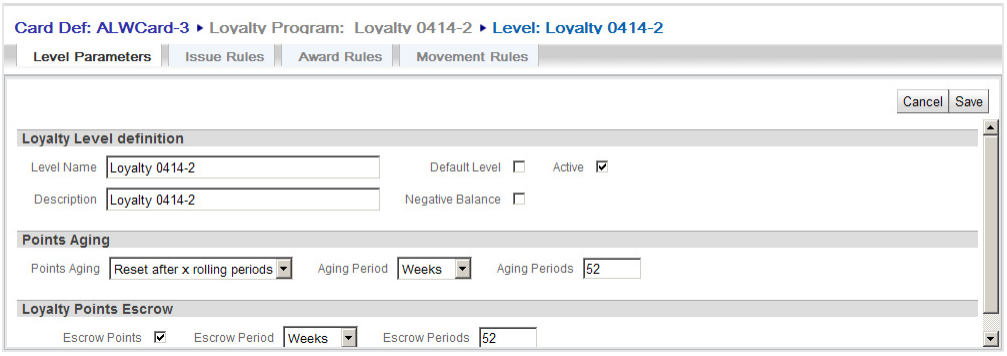


Figure 17-5: Level Parameters Tab

The following information can be viewed and edited:

- **Loyalty Level definition** - Basic information about the level. This includes the following information:
  - **Level Name** - The name of the level.
  - **Description** - A description of the level.
  - **Default Level** - A Check Box indicating/determining whether the Level is the Level to which each Customer is assigned upon joining the Loyalty Program.
  - **Negative Balance** - A Check Box indicating/determining whether the Loyalty Level allows Customers to have negative point balances.
  - **Active** - A Check Box indicating/determining whether the level is currently active.
- **Points Aging** - Rules determining how and whether Loyalty points are aged.
  - **Points Aging** - The method used for aging the points. This Selection Menu has the following options:
    - **Never Reset** - Points earned are retained until removed by an awards process.

- **Reset after x periods** - If there is no account activity in the time specified, all points (escrow, earned, and bonus) are expired and points balances reset to zero after a defined period of time.
- **Reset after x rolling periods** - The expiration date for the points is calculated from the business date they are earned. If these points are not used, they are removed after a defined period of time, regardless of account activity.

- **Aging Period** - Determines the type of period used for the Points Aging process (only active if Points Aging is set to **Reset after x periods** or **Reset after x rolling periods**).
- **Aging Periods** - Determines the number of periods (selected in Aging Period) that will pass before points are reset (only active if Points Aging is set to **Reset after x periods** or **Reset after x rolling periods**).

- **Loyalty Points Escrow** - Rules determining how and whether Loyalty points are escrowed.
  - **Escrow Points** - Determines whether points are escrowed before they become available for use as Earned Points.
    - **Checked** (☑) - Points are held as Escrow Points for a define period of time, after which they become available for use as Earned Points.
    - **Unchecked** (☐) - Points are immediately available for use as Earned Points.
  - **Escrow Period** - Indicates the type of period used to determine the escrow time (only active if Escrow Points is **Checked**).
  - **Escrow Periods** - Determines the number of periods (selected in Period Type) that will pass before points are made available (only active if Escrow Points is **Checked**).

Edit Level Parameters

To edit information in the Level Parameters, make the change in the field, then click the **Save** button to return to the Loyalty Program.

To discard changes and return to the Loyalty Program, click the **Cancel** button.

Issue Rules Tab

The Issue Rules tab contains a Layer List of rules that determine how points are issued by the Loyalty Level.

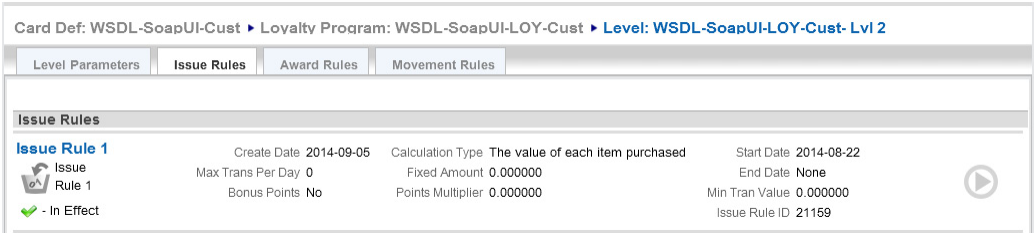


Figure 17-6: Issue Rules Tab

The following information is displayed for each Issue Rule:

- Current status of the Issue Rule, shown in the lower left corner of the Layer List item.

- **Create Date** - Date the Issue Rule was created.
- **Max Trans Per Day** - The maximum number of sales transactions in a single day that will be used to calculate Loyalty points.
- **Bonus Points** - Indicates whether this Issue Rule stipulates that the Loyalty Program issues points as Bonus Points.
  - **Yes** - Points are issued as Bonus Points.
  - **No** - Points are not issued as Bonus Points.
- **Calculation Type** - Indicates the value that is used as the point-determination method.
  - **The value of each item purchased** - The sale amount of each item purchased in the transaction.
  - **The quantity of each item purchased** - The quantity of each item purchased in the transaction.
  - **The number of qualifying transactions** - The number of qualifying transactions made by the Customer.
  - **The number of qualifying visits** - The number of qualifying visits made by the Customer.
- **Fixed Amount** - The Fixed Amount, if any, assigned to each transaction.
- **Points Multiplier** - The number multiplied by the value indicated in the Calculation Type field (only shown if the selected Calculation Type is either **The value of each item purchased** or **The quantity of each item purchased**).
- **Start Date** - Date on which the Level becomes effective.
- **End Date** - Last date of eligibility for the Level.
- **Min Tran Value** - Minimum amount of a transaction for it to be applied to a Loyalty account.
- **Issue Rule ID** - ID of the Issue Rule.

Award Rules Tab

The Award Rules tab contains a Layer List of rules that determine how awards are issued by the Loyalty Level.

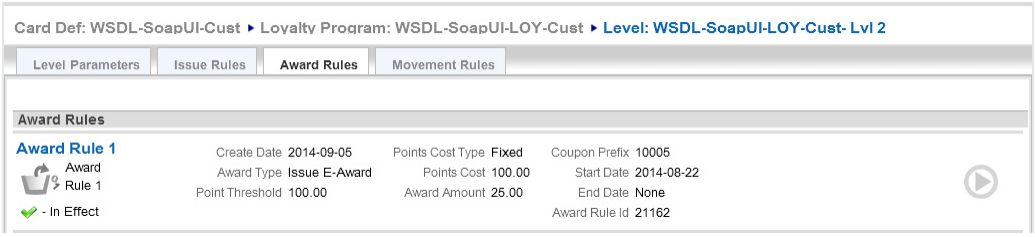


Figure 17-7: Award Rules Tab

The following information is displayed for each Award Rule:

- Current status of the Award Rule, shown in the lower left corner of the Layer List item.
- **Create Date** - Date the Award Rule was created.

- **Award Type** - Type of Award issued.
- **Point Threshold** - The number of points the Customer must earn to be eligible for the Award.
- **Points Cost Type** - The manner in which the cost is applied to the points balance.
- **Points Cost** - The cost of the Award, in points. This is the number of points deducted from the points balance when this Award is issued.
- **Award Amount** - The amount of the Award.
- **Coupon Prefix** - Prefix for the Coupon.
- **Start Date** - Date on which the Rule becomes effective.
- **End Date** - Last date on which the Rule is effective.
- **Award Rule Id** - ID of the Award Rule.

Movement Rules Tab

The Movement Rules tab contains a Layer List of rules that determine how Customers are moved from the current Loyalty Level to another within the Program.

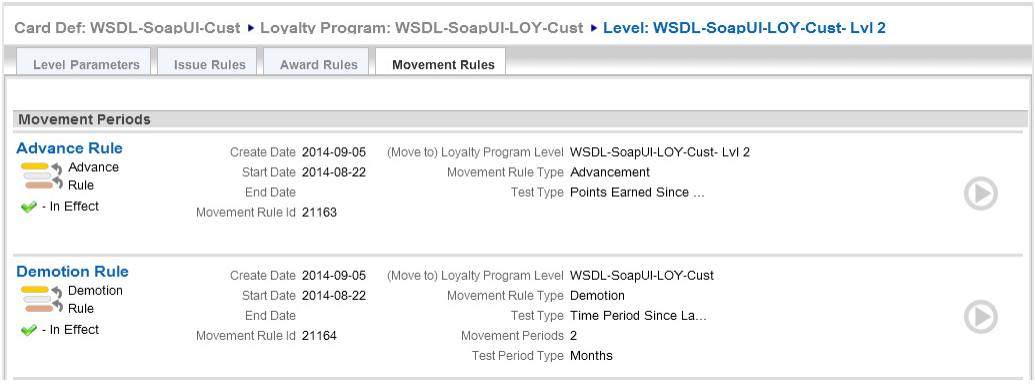


Figure 17-8: Movement Rules Tab

The following information is displayed for each Movement Rule:

- Current status of the Movement Rule, shown in the lower left corner of the Layer List item.
- **Create Date** - Date the Movement Rule was created.
- **Start Date** - Date the Movement Rule becomes effective.
- **End Date** - Last date on which the Movement Rule is effective.
- **Movement Rule Id** - ID of the Movement Rule.
- **(Move to) Loyalty Program Level** - Level to which a Customer is moved by the Movement Rule.
- **Movement Rule Type** - Type of Movement Rule.
- **Test Type** - Type of test performed to determine whether a Customer should be moved.

Add a Loyalty Level

After you Create a Loyalty Program, the Program will have one Loyalty Level. However, some Loyalty Programs require multiple Loyalty Levels with different Issue Rule and Award Rule configurations. Movement Rule configurations determine how and when Customers are moved between the Levels.

To add a Loyalty Level to a Loyalty Program:

1. In the Actions Menu for the Loyalty Program, click **Create New Loyalty Level**.

   A Level Parameters Tab tab opens with blank fields and default configurations.

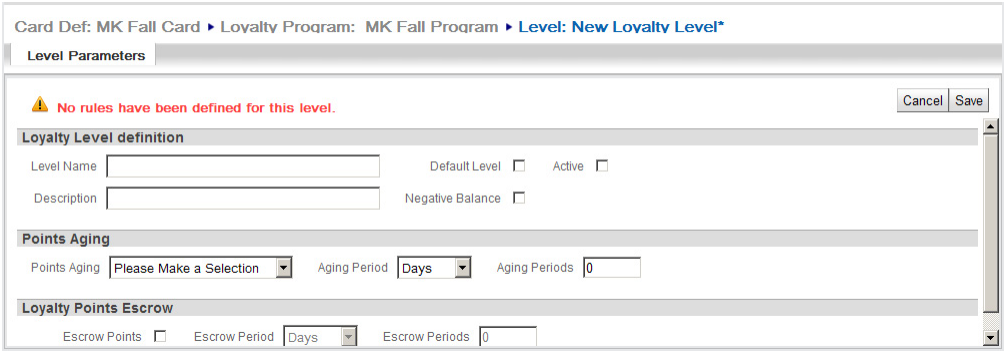


Figure 17-9: Loyalty Level Configuration

2. Make changes to the Level Parameter information. See "Level Parameters Tab" on page 493 for a description of the Level Parameter fields.
3. After making the necessary additions to the Level Parameters, click the **Save** button to create the Loyalty Level and return to the Loyalty Program. To discard changes and return to the Loyalty Program, click the **Cancel** button.
4. In the Loyalty Program, click the newly created Loyalty Level.

   The Loyalty Level opens.

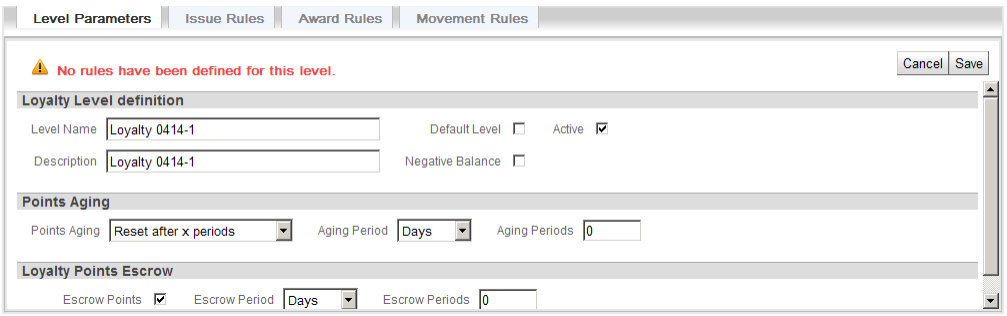


Figure 17-10: Loyalty Level - No Rules Defined

5. Create the Rules for the Loyalty Level. See the following procedures for instructions:
   - "Add Issue Rule" on page 502
   - "Add Award Rule" on page 509
   - "Add Movement Rule" on page 513

- "Add Time Eligibility Rule" on page 65
- "Add Item Eligibility Rule (Simple)" on page 55
- "Add Location Eligibility Rule" on page 49
- "Add Segment Eligibility Rule" on page 52

6. Click the **Save** button to save the new configuration and return to the Loyalty Level, or click the **Cancel** button to discard the changes and return to the Loyalty Level.

Issue Rule

Issue Rules determine how points are earned within a Loyalty Level.

An Issue Rule is opened by clicking on the Issue Rule in the Issue Rules Tab.

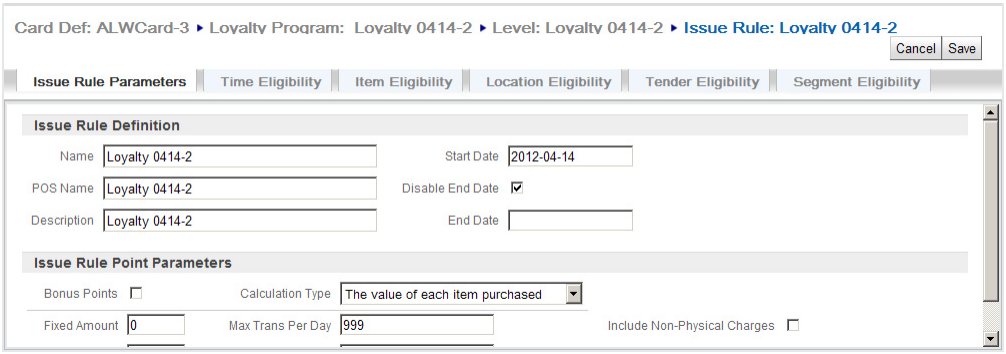


Figure 17-11: Issue Rule Screen

In each Issue Rules are a set of Tabs containing information about the Issue Rule: Issue Rule Parameters Tab, Time Eligibility Tab, Item Eligibility Tab, Location Eligibility Tab, Tender Eligibility Tab, and Segment Eligibility Tab.

Actions Menu



The Actions menu for each Issue Rule has the following option:

- **DELETE ISSUE RULE** - Deletes the open Issue Rule. See "Delete Issue Rule" on page 506 for more information.

Issue Rule Parameters Tab

This tab displays common parameters for the Issue Rule. This tab includes the following sections:

- **Issue Rule Definition** - Basic information about the Issue Rule. This section contains the following fields:
  - **Name** - Name of the Issue Rule.
  - **POS Name** - Name of the Issue Rule displayed on a POS system.
  - **Description** - Description of the Issue Rule.
  - **Start Date** - Date the Issue Rule becomes effective.

- **Disable End Date** - If checked (☑), the End Date configuration will be deactivated, allowing the Issue Rule to be effective forever.
- **End Date** - Last date on which the Issue Rule will be effective.

- **Issue Rule Point Parameters** - Determines how points are earned in the Issue Rule. This section includes the following fields:
  - **Flag Points as Bonus Points** - This Check Box determines whether the Issue Rule issues bonus points or regular points.
    - **Checked** - The Issue Rule stipulates that the Loyalty Program issues points as Bonus Points.
    - **Unchecked** - The Issue Rule stipulates that the Loyalty Program does not issue points as Bonus Points.
  - **Calculation Type** - Determines the value that is used as the point-determination method.
    - **The value of each item purchased** - The sale amount of each item purchased in the transaction.
    - **The quantity of each item purchased** - The quantity of each item purchased in the transaction.
    - **The number of qualifying transactions** - The number of qualifying transactions made by the Customer.
    - **The number of qualifying visits** - The number of qualifying visits by the Customer.
  - **Fixed Amount** - The Fixed Amount, if any, assigned to each transaction.
  - **Points Multiplier** - The number multiplied by the value indicated in the Calculation Type field (only shown if the Calculation Type is **The value of each item purchased** or **The quantity of each item purchased**).
  - **Max Trans Per Day** - The maximum number of transactions per day for which points will be issued by the Loyalty Program.
  - **Transaction Min Value** - Minimum amount of a transaction for it to be applied to a Loyalty account.
  - **Include Non-Physical Charges** - Determines whether points will be issued for non-physical items in a transaction.
- **Customer Eligibility Processing** - Radio Buttons that determine how Segment Eligibility Rules, Birthday Time Rules, and Signup Anniversary Time Rules are used when processing transactions that use the Card.
  - **Use customer associated to the loyalty card when processing eligibility rules** - Use the primary Customer assigned to the Card.
  - **Use customer associated to the transaction when processing eligibility rules** - Use the Customer assigned to the transaction.

Time Eligibility Tab

The Time Eligibility tab displays a List of rules that determine the times at which the Issue Rule is effective.



Figure 17-12: Time Eligibility Tab

If there are no Time Eligibility rules defined for the Issue Rule, Relate provides a **Click Here** Link *for adding one.*

- For more information about Time Eligibility Rules, see "Time Eligibility" on page 64.
- For instruction on configuring Time Eligibility Rules, see "Define Time Eligibility" on page 65.

Item Eligibility Tab

The Item Eligibility tab displays a List of Items and or Attributes for Items that are eligible and/or excluded from the Issue Rule.

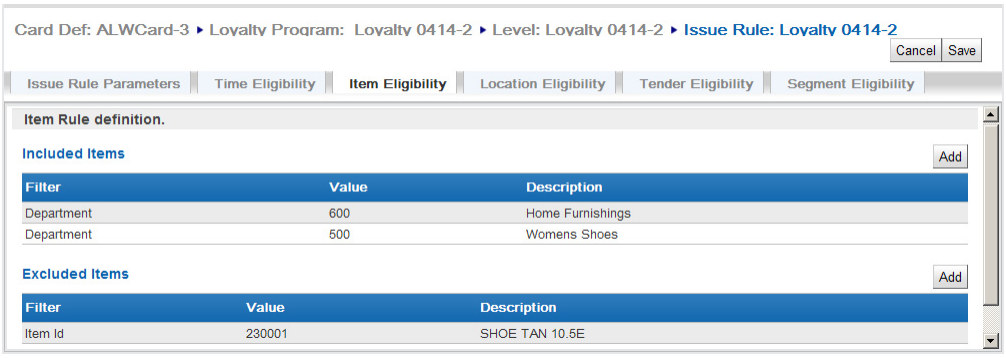


Figure 17-13: Item Eligibility Tab

If there are no Item Eligibility rules defined for the Issue Rule, Relate provides a **Click Here** Link *for adding an Included Item and a* **Click Here** Link *for adding an Excluded Item.*

- For more information about Item Eligibility Rules, see "Item Eligibility" on page 54.
- For instructions on configuring Item Eligibility Rules, see "Define Item Eligibility" on page 54.

Location Eligibility Tab

The Location Eligibility tab displays a List of Locations and/or Attributes for Locations that are eligible and/or excluded from the Issue Rule.

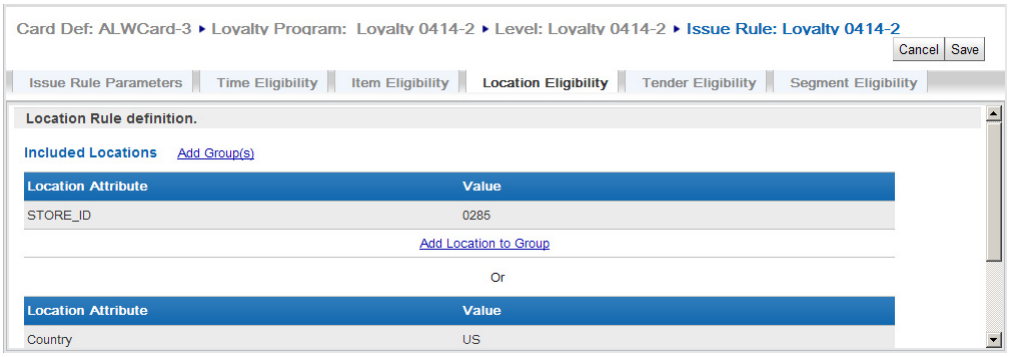


Figure 17-14: Location Eligibility Tab

If there are no Location Eligibility rules defined for the Issue Rule, Relate provides a **Click Here** Link *for adding an Included Location and a* **Click Here** Link *for adding an Excluded Location.*

- For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.
- For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.

Tender Eligibility Tab

The Tender Eligibility tab displays a List of tenders that can be made eligible or ineligible for the Issue Rule.

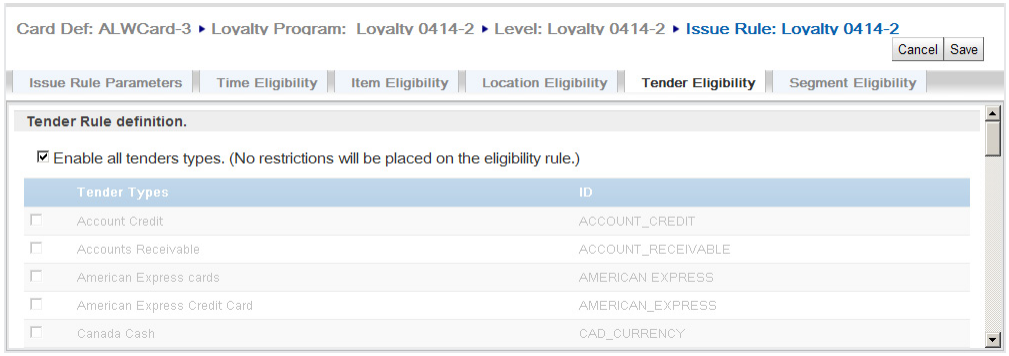


Figure 17-15: Tender Eligibility Tab

- For more information about Tender Eligibility Rules, see "Tender Eligibility" on page 67.
- For instruction on configuring Tender Eligibility Rules, see "Define Tender Eligibility" on page 67.

Segment Eligibility Tab

The Segment Eligibility tab displays a List of Segments and/or Segment Strata that are eligible for the Issue Rule. If no Segments are listed, all Segments and Strata are eligible for the Issue Rule.

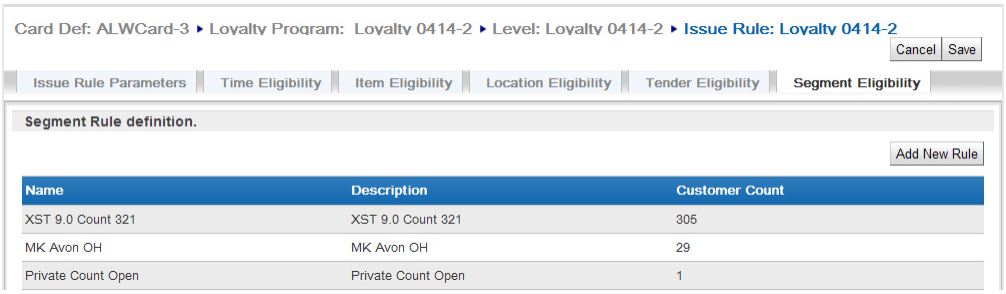


Figure 17-16: Segment Eligibility Tab

If there are no Segment Eligibility rules defined for the Issue Rule, Relate provides a **Click Here** Link *for adding one.*

- For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.
- For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.

Add Issue Rule

To add an Issue Rule to a Loyalty Level:

1. In the Loyalty Level Actions Menu, click **Create New Issue Rule**.

   The New Issue Rule Wizard opens with the Issue Rule Definition step.

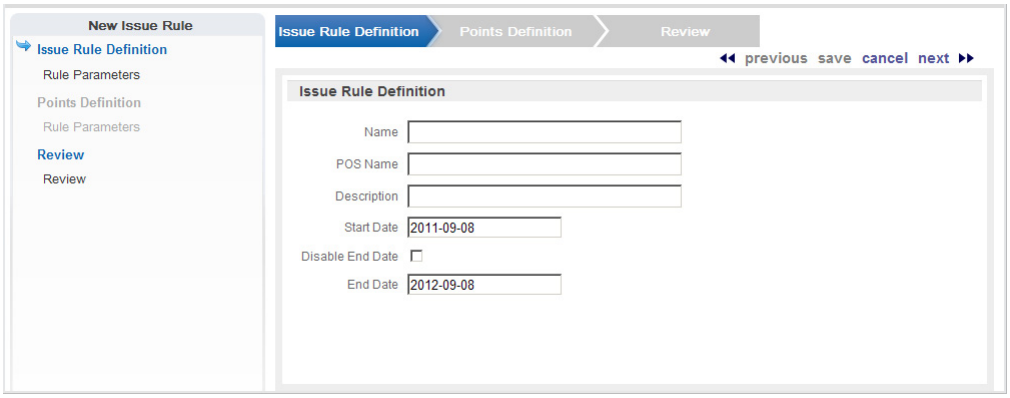


Figure 17-17: Issue Rule Wizard

2. In the Issue Rule Definition step, configure the basic information for the Issue Rule:
   - **Name** - Name of the Issue Rule.

- **POS Name** - Name of the Issue Rule displayed on a POS system.
- **Description** - Description of the Issue Rule.
- **Start Date** - Date the Issue Rule becomes effective.
- **Disable End Date** - If this Check Box is checked (☑), the End Date configuration will be deactivated, allowing the Issue Rule to be effective forever. Otherwise, the End Date field will be used to determine the expiration date of the Issue Rule.
- **End Date** - Last date on which the Issue Rule will be effective.

3. Click **next** to continue.

The Points Definition step opens.

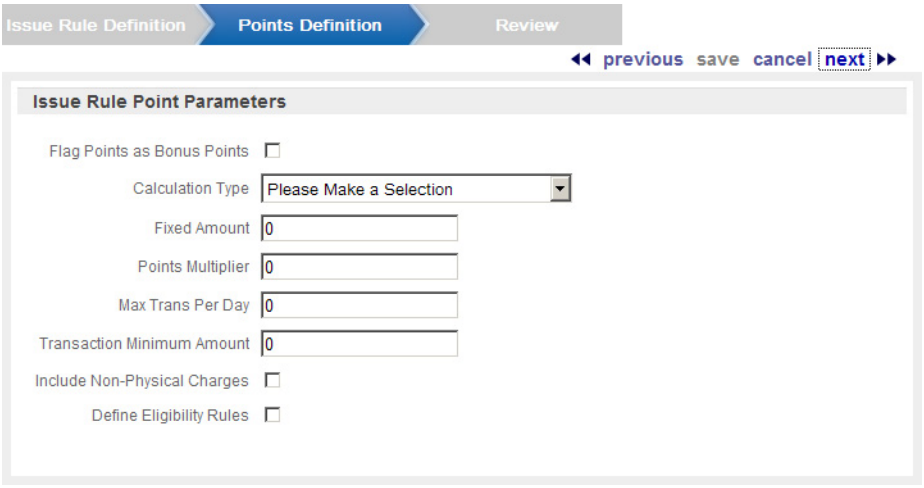


Figure 17-18: Points Definition Step

4. In the Points Definition step, define the points used by the Loyalty Program:

- **Flag Points as Bonus Points** - This Check Box determines whether the Loyalty Program issues points as bonus points.
  - **Checked** - Points are issued as bonus points.
  - **Unchecked** - Points are not issued as bonus points.
- **Calculation Type** - This field determines the method used to calculate points. This Selection Menu has the following possible values:
  - **The value of each item purchased** - The sale amount of each item purchased in the transaction.
  - **The quantity of each item purchased** - The quantity of each item purchased in the transaction.
  - **The number of qualifying transactions** - The number of qualifying transactions performed by the Customer.
  - **The number of qualifying visits** - The number of qualifying visits by the Customer.
- **Fixed Amount** - The Fixed Amount of points earned by each transaction.

- **Points Multiplier** - The number multiplied by the value indicated in the Calculation Type field (only shown if the Calculation Type is **The value of each item purchased** or **The quantity of each item purchased**).
- **Max Trans Per Day** - The maximum number of transactions per day for which points will be issued by the Loyalty Program.
- **Transaction Minimum Amount** - Minimum amount of a transaction for it to be applied to a Loyalty account.
- **Include Non-Physical Charges** - This Check Box determines whether points will be issued for non-physical items in a transaction.
- **Define Eligibility Rules** - This Check Box indicates whether to configure Eligibility Rules for the Issue Rule.
  - **Checked** - Eligibility Rules will be defined for the Issue Rule. Continue with step 5.
  - **Unchecked** - There are no eligibility rules for the Issue Rule. All the points earned by the Loyalty Level are applied to the Customer account. Continue with step 15.

5. Click **next** to continue.

The Time Eligibility step opens.

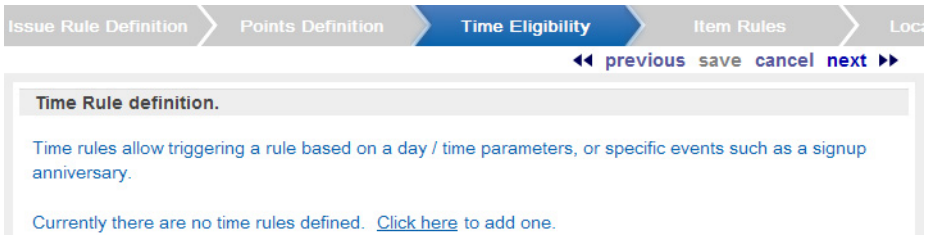


Figure 17-19: Time Eligibility Step

6. Define the Time Eligibility Rules for the Issue Rule.

- For instructions on configuring Time Eligibility Rules, see "Define Time Eligibility" on page 65.
- For more information about Time Eligibility Rules, see "Time Eligibility" on page 64.

7. Click **next** to continue.

The Item Rules step opens.

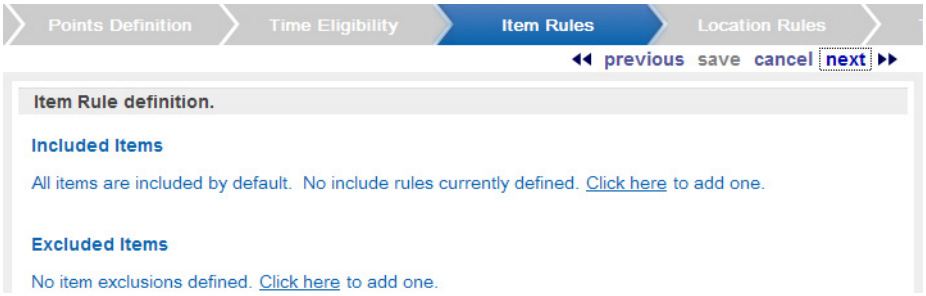


Figure 17-20: Item Rules Step

8. Define the Item Eligibility Rules for the Issue Rule.
   - ❑ For instructions on configuring Item Eligibility Rules, see "Define Item Eligibility" on page 54.
   - ❑ For more information about Item Eligibility Rules, see "Item Eligibility" on page 54.
9. Click **next** to continue.

   The Location Rules step opens.

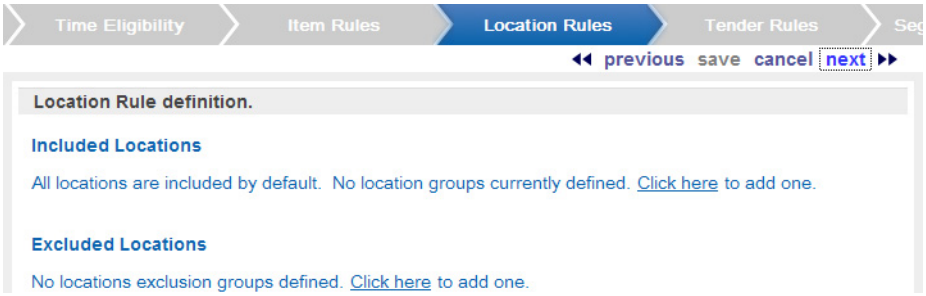


Figure 17-21: Location Rules Step

10. Define the Location Eligibility Rules for the Issue Rule.
    - ❑ For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.
    - ❑ For more information about Location Eligibility Rules, see "Location Eligibility" on page 48.
11. Click **next** to continue.

    The Tender Rules step opens.

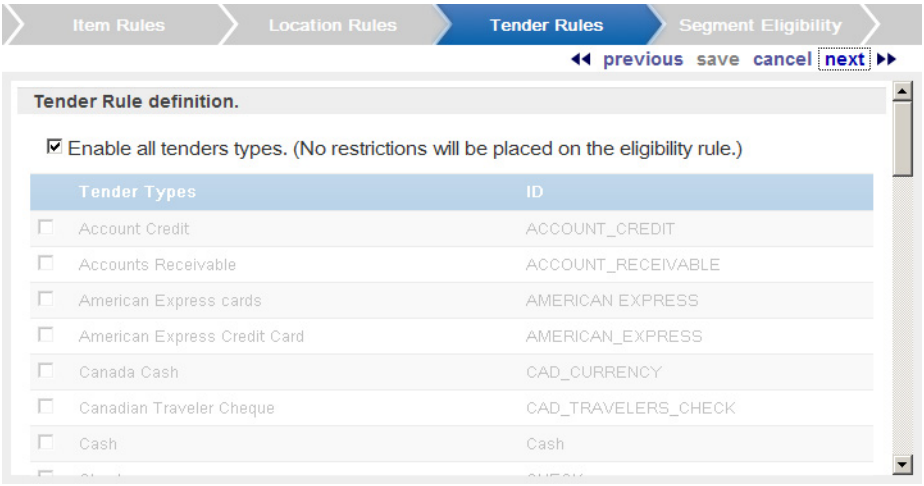


Figure 17-22: Tender Rules Step

12. Define the Tender Eligibility Rules for the Issue Rule.
    - ❑ For instructions on configuring Tender Eligibility Rules, see "Define Tender Eligibility" on page 67.

- ❑ For more information about Tender Eligibility Rules, see "Tender Eligibility" on page 67.

13. Click **next** to continue.

The Segment Eligibility step opens.

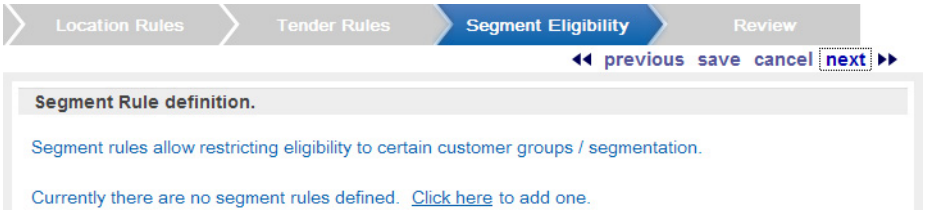


Figure 17-23: Segment Eligibility Step

14. Define the Segment Eligibility Rules for the Issue Rule.

- ❑ For instructions on configuring Segment Eligibility Rules, see "Define Segment Eligibility" on page 52.
- ❑ For more information about Segment Eligibility Rules, see "Segment/Target Eligibility" on page 51.

15. Click **next** to continue.

The Review step opens.

16. Review the entered information to ensure that it is correct.

- ❑ Click **save** to save the Rule with the current settings and return to the Loyalty Level page.
- ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
- ❑ Click **cancel** to delete all information and return to the Loyalty Level page.

Delete Issue Rule

To delete an Issue Rule from a Loyalty Level:

1. Open the Issue Rule in the Loyalty Level.

2. In the Actions Menu, click **Delete Issue Rule**.

A confirmation prompt opens.

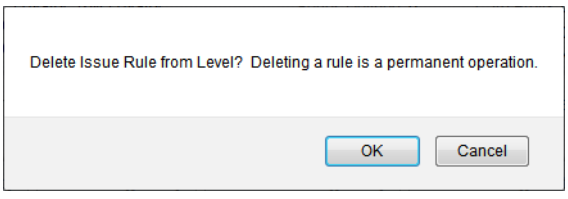


Figure 17-24: Confirmation Prompt

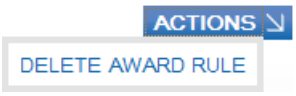
3. Click **OK** to delete the Issue Rule and return to the Loyalty Level. Click **Cancel** to cancel the deletion and return to the Issue Rule.

Award Rule

Award Rules determine how awards are given within a Loyalty Level. Award Rules are accessed through the Loyalty Level to which they belong.

Actions Menu

The Actions Menu for the Award Rule includes the following option:



- **DELETE AWARD RULE** - Deletes the Award Rule from the Loyalty Level. See "Delete Award Rule" on page 509 for more information.

View/Edit Award Rule

To open an Award Rule, click the Award Rule in the Award Rules Tab.

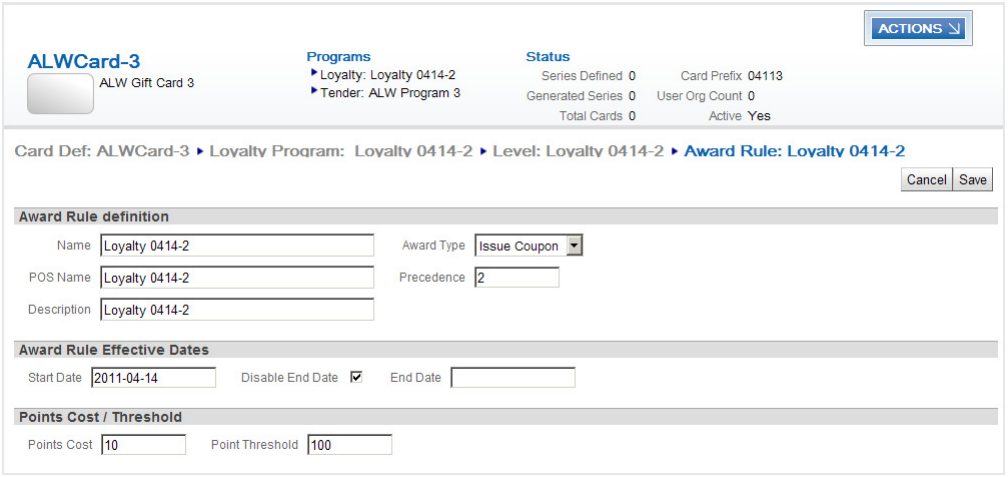


Figure 17-25: Award Rule Screen

To edit an open Award Rule, make the change in the field, then click the **Save** button to return to the Loyalty Level. To discard changes and return to the Loyalty Level, click the **Cancel** button.

Each Award Rule contains the following information to view and/or edit:

- **Award Rule definition** - Basic configurations for the Award Rule. This section contains the following fields:
  - **Name** - Name of the Award Rule.
  - **POS Name** - Name of the Award Rule displayed on a POS system.
  - **Description** - Description of the Award rule.
  - **Award Type** - The type of Award given by the Award Rule. This Selection Menu has the following options:
    - **Issue E-Award** - An E-Award is issued to the Customer through an Award Program.
    - **Issue Coupon** - A paper coupon is issued to the customer.

- **Precedence** - Order in which the Award Rule will be applied if more than one Award Rule is effective.

- **Award Rule Effective Dates** - Date range in which the Award Rule will be effective. This section contains the following fields:
  - **Start Date** - Date the Award Rule becomes effective.
  - **Disable End Date** - If checked (☑), the End Date configuration will be deactivated, allowing the Award Rule to be effective forever.
  - **End Date** - Last date on which the Award Rule will be effective.
- **Points Cost/Threshold** - Configurations for determining the point cost and point threshold for the Award Rule. This section contains the following fields:
  - **Points Cost** - Number of Points consumed by the issuance of the Award and deducted from the Loyalty Account.
  - **Point Threshold** - Number of Points that must be in a Loyalty Account for it to be eligible for the Award.
- **E-Award Rule Parameters** - Parameters determining the E-Award that is given by the Loyalty Program, based on the Award Rule. This section contains the following fields:

  The fields in the E-Award Rule Parameters section will change depending upon the value in the Points Cost Type Selection Menu.
  - If **Points Cost Type** = **Fixed**, the E-Award is a fixed amount. The following fields will be displayed:
    - **Award Amount** - The amount (in the base currency of the Award Program) of the E-Award.
    - **Award Program** - The Award Program used by the E-Award. This Award Program must be defined within the Card Definition.
    - **Coupon Prefix** - The prefix for the Coupon Number.
    - **Expiration Period Type** - Indicates the type of period used in determining when the E-Award will expire.
    - **Expiration # of periods** - (not displayed if Expiration Period Type is set to Use Program) Determines the number of periods (from Expiration Period Type) that will pass before an E-Award expires.
  - If **Points Cost Type** = **Cashback**, the E-Award value will depend upon the number of points in the Loyalty Account, which allows for full redemption. The following fields will be displayed:
    - **Minimum Award** - The minimum allowed amount (in the base currency of the Award Program) of the E-Award.
    - **Award Program** - The Award Program used by the E-Award. This Selection Menu includes each Award Program defined within the Card Definition.
    - **Coupon Prefix** - The prefix for the Coupon Number.
    - **Expiration Period Type** - Indicates the type of period used in determining when the E-Award will expire.

      If **Use Program** is selected in this Selection Menu, the Award Rule will have the same expiration rules as the Program selected in the Award Program field.

- **Expiration # of periods** - (not displayed if Expiration Period Type is set to Use Program) Determines the number of periods (from Expiration Period Type) that will pass before an E-Award expires.
- **Award Factor** - The multiple used to convert points to an E-Award amount (in the base currency of the Award Program).
- **Reset Balance** - Indicates whether the loyalty points balance is reset when the Award is issued.

Add Award Rule

To add an Award Rule to a Loyalty Level, click **CREATE NEW AWARD RULE** in the Actions Menu for the Loyalty Level. A blank Award Rule opens.

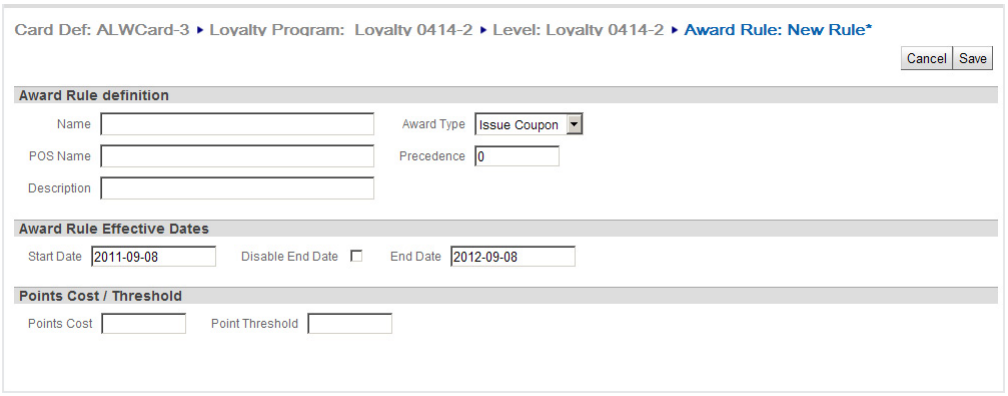


Figure 17-26: Blank Award Rule

Enter the information for the Award Rule. See "View/Edit Award Rule" on page 507 for a description of each field.

When you have finished entering information, click the **Save** button to return to the Loyalty Level. To discard changes and return to the Loyalty Level, click the **Cancel** button.

Delete Award Rule

To delete an Award Rule from a Loyalty Level:

1. Open the Award Rule in the Loyalty Level.
2. In the Actions menu, click **DELETE AWARD RULE**.

   A confirmation prompt opens.



Figure 17-27: Confirmation Prompt

3. Click **OK** to delete the Award Rule and return to the Loyalty Level. Click **Cancel** to cancel the deletion and return to the Award Rule.

Movement Rule

Movement Rules determine how Customers are moved from one Loyalty Level to another. Movement Rules are accessed through the Loyalty Level to which they belong.

Actions Menu

The Actions Menu for the Movement Rule includes the following option:



- **DELETE MOVEMENT RULE** - Deletes the Movement Rule from the Loyalty Level. See "Delete Movement Rule" on page 513 for more information.

View/Edit Movement Rule

To open a Movement Rule, click the Rule in the Movement Rules Tab. The Rule opens in the Movement Rule screen.

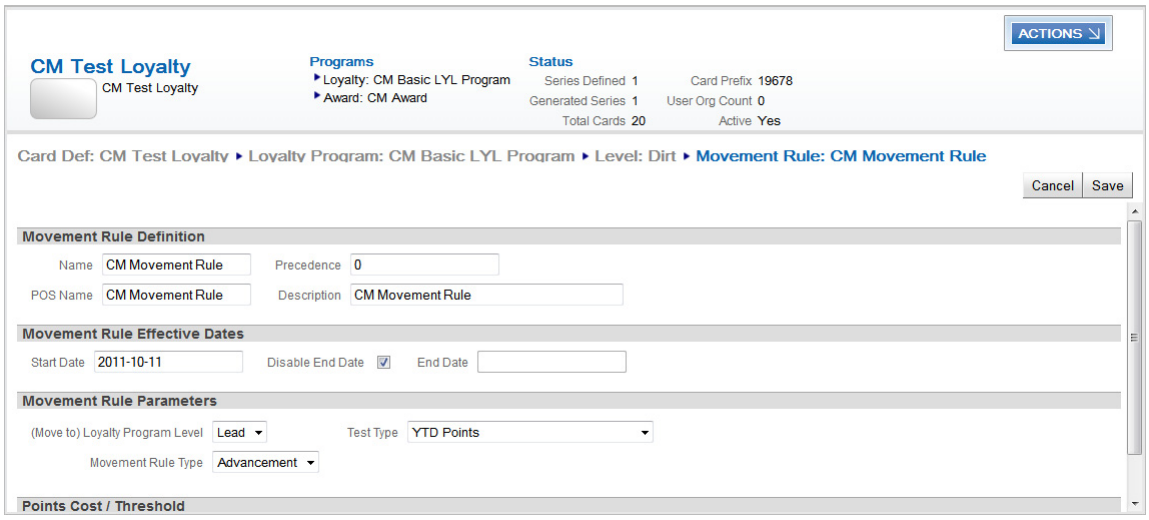


Figure 17-28: Movement Rule Screen

To edit an open Movement Rule, make the change in the field, then click the **Save** button to return to the Loyalty Level. To discard changes and return to the Loyalty Level, click the **Cancel** button.

Each Movement Rule contains the following information to view and/or edit:

- **Movement Rule Definition** - Basic configurations for the Movement Rule. This section contains the following fields:
  - **Name** - Name of the Movement Rule.
  - **POS Name** - Name of the Movement Rule displayed on a POS system.
  - **Precedence** - Order in which the Movement Rule will be applied if more than one Movement Rule is effective.
  - **Description** - Description of the Movement Rule.

- **Movement Rule Effective Dates** - Date range during which the Movement Rule will be effective. This section contains the following fields:
  - **Start Date** - Date the Movement Rule becomes effective.
  - **Disable End Date** - If checked (☑), the End Date configuration will be deactivated, allowing the Movement Rule to be effective forever.
  - **End Date** - Last date on which the Movement Rule will be effective.
- **Movement Rule Parameters** - Parameters determining how the Loyalty Level movement is performed. This section contains the following fields:
  - **(Move to) Loyalty Program Level** - The Loyalty Level to which the Customer is moved when the Loyalty Account meets the requirements for level movement.
  - **Test Type** - Type of test performed to determine whether a Customer should be moved. This Selection Menu has the following options:
    - **YTD Points** - Movement depends upon the number of points earned year-to-date in the Customer account.
    - **LTD Points** - Movement depends upon the number of points earned lifetime-to-date in the Customer account.
    - **Points Earned Since Last Level Move** - Movement depends upon the number of points earned since the last level move, or the creation of the Customer account.
    - **Average Points Earned Per Month** - Movement depends upon the average number of points earned per month in a defined number of months.
    - **Time Period Since Last Level Move** - Movement occurs after a defined period of time has passed since the last level move, or the creation of the Customer account.
  - **Movement Rule Type** - The type of action that is performed when the Movement Rule is activated. This Selection Menu has the following options:
    - **Advancement** - The Customer Account is moving to a higher level.
    - **Sustain** - The move is a lateral move.
    - **Demotion** - The Customer account is moving to a lower level.
  - **Movement Periods** - The number of periods (from Test Period Type) used for the movement test (only visible if the Test Type is either **Average Points Earned Per Month** or **Time Period Since Last Level Move**).
  - **Test Period Type** - The type of period used for the movement test (only visible if the Test Type is **Time Period Since Last Level Move**).
  - **Extend sustain period if customer meets the following criteria** - This Check Box determines whether the time period (determined by **Movement Periods** and **Test Period Type**) will be extended when the Customer meets certain criteria (only visible if the Movement Rule is **Sustain**, and the Test Type is **Time Period Since Last Level Move**).

    See "Extend a Sustain Period" on page 512 for further instructions and information about the fields that open when this Check Box is checked (☑).

- **Points Cost/Threshold** - Configurations for determining the point cost and point threshold for the Movement Rule. This section contains the following fields:
  - **Points Cost** - Number of Points consumed for the account movement and deducted from the Loyalty Account.
  - **Point Threshold** - Number of Points used by the Test Type (only visible if the Test Type does **not** equal **Time Period Since Last Level Move**).

Extend a Sustain Period

After a lateral, sustained Movement Rule is performed on an Account, Relate will not run the same Movement Rule on that Account (unless the Account changes Loyalty Levels). So, to extend the period of time an Account remains at a Loyalty Level following a sustain Movement Rule, the sustain period must be extended.

To extend a sustain period, enter a check mark (☑) in the **Extend sustain period if customer meets the following criteria** Check Box. The following fields open:

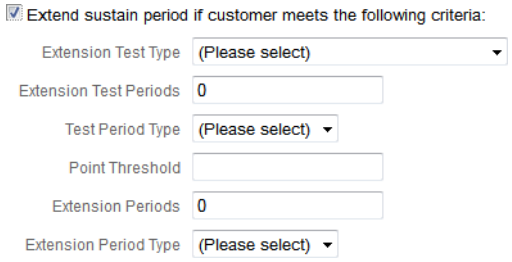


Figure 17-29: Extend Sustain Period Fields

- **Extension Test Type** - The type of test performed used to determine whether to extend the sustain period. This Selection Menu has the following options:
  - **YTD Points** - The number of points earned year-to-date.
  - **LTD Points** - The number of points earned lifetime-to-date.
  - **Points Earned Since Last Level Move** - The number of points earned since the last time the Account changed its Loyalty Level.
  - **Average Points Earned Per Month** - The average number of points earned per month.
- **Extension Test Periods** - The number of periods (determined by Test Period Type) that the sustain period is extended.
- **Test Period Type** - The type of time period used to change the sustain period.
- **Point Threshold** - The number of points that must be earned to extend the sustain period. Used with **Extension Test Type** (see above).
- **Extension Periods** - This Selection Menu determines the type of period by which the sustain period is extended.
- **Extension Period Type** - The number of periods (from Extension Periods) by which the sustain period is extended.

Add Movement Rule

To add a Movement Rule to a Loyalty Level, click **Create New Movement Rule** in the Actions Menu for the Loyalty Level. A blank Movement Rule opens.

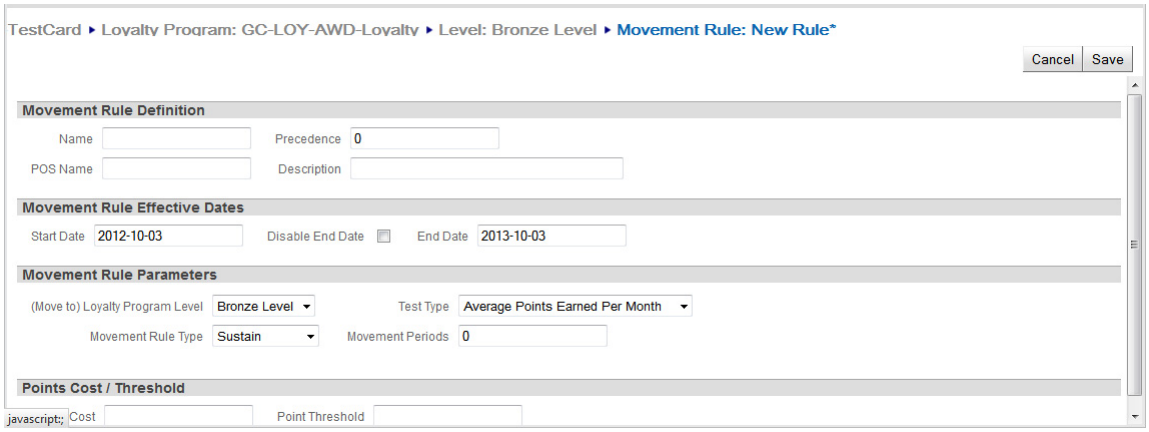


Figure 17-30: Blank Movement Rule

Enter the information for the Movement Rule. See "View/Edit Movement Rule" on page 510 for a description of each field.

When you have finished entering information, click the **Save** button to return to the Loyalty Level. To discard changes and return to the Loyalty Level, click the **Cancel** button.

Delete Movement Rule

To delete a Movement Rule from a Loyalty Level:

1. Open the Movement Rule in the Loyalty Level.
2. In the Actions Menu, click **Delete Movement Rule**.

   A confirmation prompt opens.

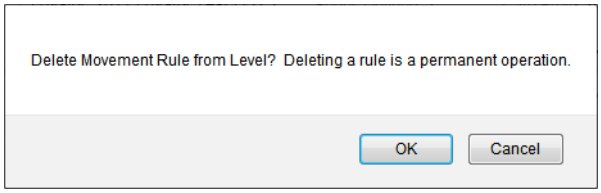


Figure 17-31: Confirmation Prompt

3. Click **OK** to delete the Movement Rule and return to the Loyalty Level. Click **Cancel** to cancel the deletion and return to the Movement Rule.

Entitlement Program

The following information is displayed for an Entitlement Program:

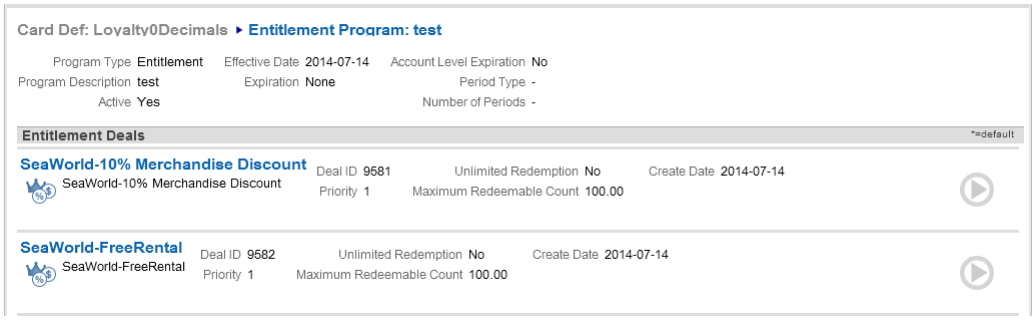


Figure 17-32: Entitlement Program Screen

- **Program Type** - Type of Program (i.e. Entitlement).
- **Program Description** - Description of the Program.
- **Active** - Indicates whether the Program is currently active.
- **Effective Date** - Date the Program is first effective.
- **Expiration** - Date the Program expires.
- **Account Level Expiration** - Indicates whether the account expires after a certain period of time.
- **Period Type** - If Account Level Expiration is set to Yes, indicates the type of period used for the Account Level Expiration Date.
- **Number of Periods** - If Account Level Expiration is set to Yes, determines the number of periods (from Period Type) that will pass before an Award Account expires.
- **Entitlement Deals** - A Layer List displaying the Deal(s) associated with the Program.
  - Name of the Deal.
  - Description of the Deal.
  - **Deal ID** - ID of the Deal.
  - **Priority** - Priority assigned to the Deal.
  - **Unlimited Redemption** - Indicates whether there is a maximum number of times the Deal can be applied.
  - **Maximum Redeemable Count** - The maximum number of times the Deal can be redeemed.
  - **Create Date** - Date the Deal was created.

Actions Menu

The Actions Menu for an Entitlement Program contains the following options:



- **ADD ENTITLEMENT DEAL** - Add a new Entitlement Deal to the Program.
- **DEACTIVATE PROGRAM** - Deactivate the Program (only available for active Programs).
- **ACTIVATE PROGRAM** - Activate the Program (only available for inactive Programs).

Entitlement Deal

An Entitlement Deal defines a set of rules that provide limits on the number of times a Deal can be applied. Each Entitlement Program must be assigned at least one Entitlement Deal.

Open an Entitlement Deal

An Entitlement Deal is opened by clicking it in an Entitlement Program Layer List.

Each Entitlement Deal displays a set of Tabs displaying information about the Entitlement Program: Entitlement Deal Parameters Tab, Time Eligibility Tab, Location Eligibility Tab

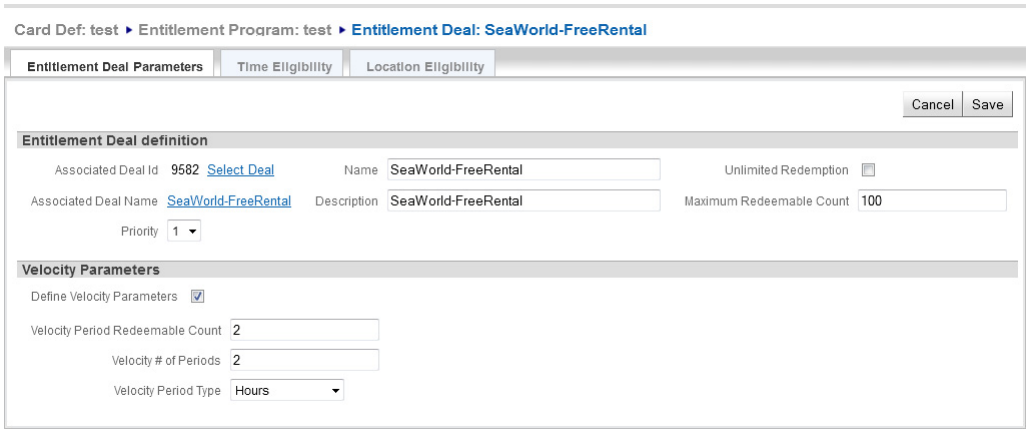


Figure 17-33: Entitlement Deal

Actions Menu

The Actions Menu for an Entitlement Deal has the following option:



- **DELETE ENTITLEMENT DEAL** - Deletes the Entitlement Deal from the Entitlement Program.

Entitlement Deal Parameters Tab

The Entitlement Deal Parameters Tab allows users to view and edit the definition of the Entitlement Deal.

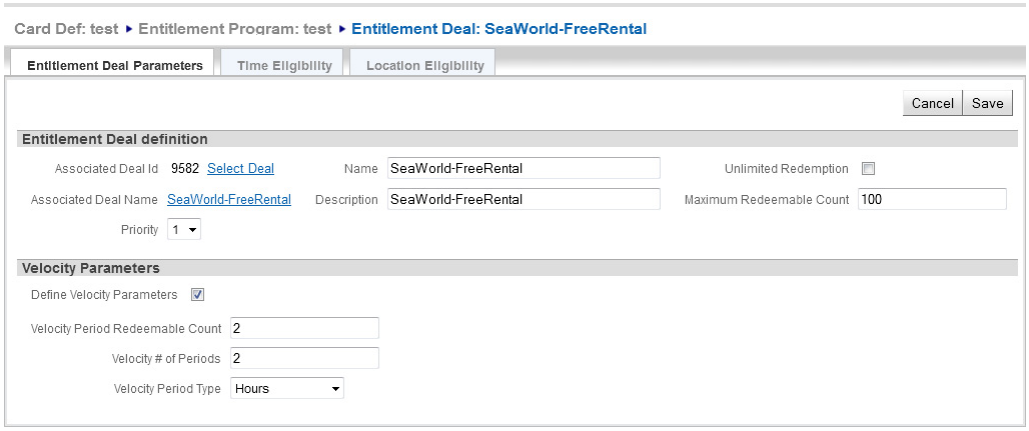


Figure 17-34: Entitlement Deal Parameters Tab

The following information can be viewed and edited:

- **Entitlement Deal definition** - This area contains the fields that define the
  - **Associated Deal Id** - ID of the Deal offered as part of the Entitlement Deal.
  - **Associated Deal Name** - Name of the Deal offered as part of the Entitlement Deal.
  - **Priority** - Number indicating the order in which the Deal is offered.
  - **Name** - Name of the Entitlement Deal.
  - **Description** - Description of the Entitlement Deal.
  - **Unlimited Redemption** - Check Box indicating whether there is a limit on the number of times the Entitlement Deal can be redeemed.
  - **Maximum Redeemable Count** - Maximum number of times the Entitlement Deal can be redeemed. This field is only enabled when the Unlimited Redemption
- **Velocity Parameters** - This area contains the fields that rate at which the Entitlement Deal can be redeemed.
  - **Define Velocity Parameters** - Check Box indicating whether there are limits on the rate at which Entitlement Deals can be redeemed.
  - **Velocity Period Redeemable Count** - Number of times the Entitlement Deal can be redeemed within the defined period of time. *This field is only present when the Define Velocity Check Box is checked (☑).*
  - **Velocity # of Periods** - Number of time periods (defined in Velocity Period Type, below) in the rate limitation. *This field is only present when the Define Velocity Check Box is checked (☑).*
  - **Velocity Period Type** - The number of time periods in the rate limitation. *This field is only present when the Define Velocity Check Box is checked (☑).*

Time Eligibility Tab

The Time Eligibility Tab displays a List of rules that determine the times at which the Entitlement Deal is effective.

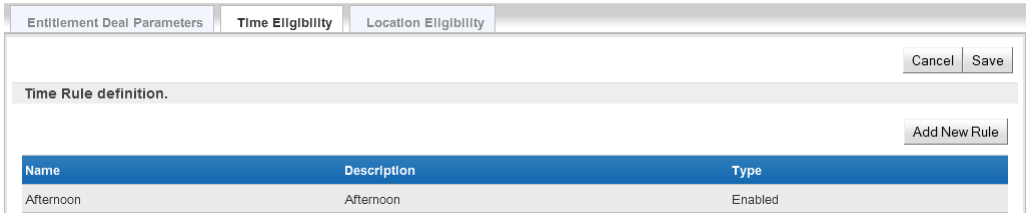


Figure 17-35: Time Eligibility Tab

If there are no Time Eligibility rules defined for the Entitlement Deal, Relate provides a **Click Here** Link *for adding one.*

- For more information about Time Eligibility Rules, see "Time Eligibility" on page 64.
- For instruction on configuring Time Eligibility Rules, see "Define Time Eligibility" on page 65.

Location Eligibility Tab

The Location Eligibility Tab displays a List of rules that determine locations at which the Entitlement Deal is effective.

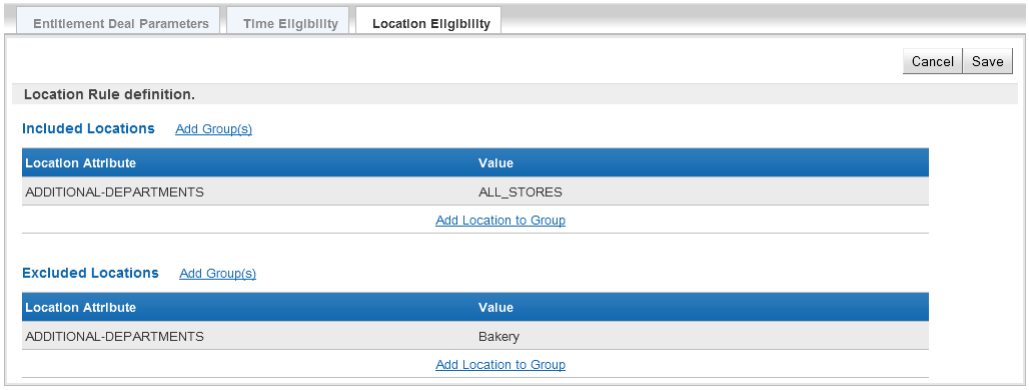


Figure 17-36: Location Eligibility Tab

If there are no Location Eligibility rules defined for the Entitlement Deal, Relate provides a **Click Here** Link *for adding an Included Location and a* **Click Here** Link *for adding an Excluded Location.*

- For information about Location Eligibility Rules, see "Location Eligibility" on page 48.
- For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.

Create Entitlement Deal

To create an Entitlement Deal in an Entitlement Program:

1. Select **ADD ENTITLEMENT DEAL** in the Actions Menu for an Entitlement Deal (see "Actions Menu" on page 515).

> *If there are no Entitlement Deals defined for the Entitlement Program, Relate provides a* **Click Here** *Link for adding an Entitlement Deal.*

A blank Entitlement Deal Parameters Tab opens.

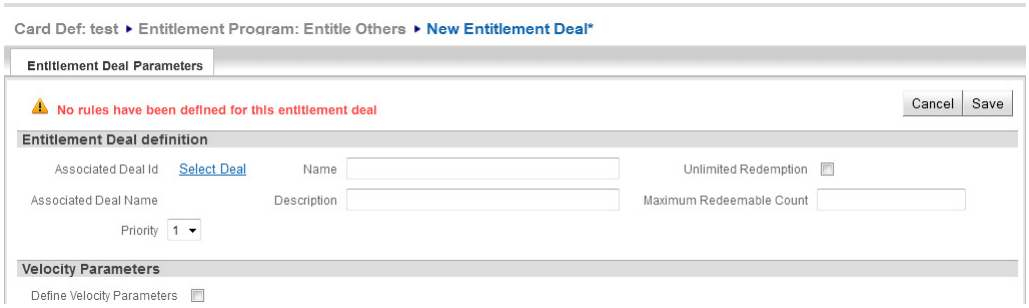


Figure 17-37: Blank Entitlement Deal Parameters Tab

2. Enter the information for the Entitlement Deal. See "Entitlement Deal Parameters Tab" on page 516 for more information.
3. Click **Save** to save the information and create the Entitlement Deal in the Entitlement Program.
4. If necessary, use the Time Eligibility Tab to define Time Eligibility Rules, and/or the Location Eligibility Tab to define Location Eligibility Rules.
   - ❑ For more information about Time Eligibility Rules, see "Time Eligibility" on page 64.
   - ❑ For instruction on configuring Time Eligibility Rules, see "Define Time Eligibility" on page 65.
   - ❑ For information about Location Eligibility Rules, see "Location Eligibility" on page 48.
   - ❑ For instructions on configuring Location Eligibility Rules, see "Define Location Eligibility" on page 49.

Create New Program

To add a new Program to a Card Definition:

1. Select **CREATE NEW PROGRAM** in the Actions Menu for a Card Definition (see "Actions Menu" on page 466).

> *If there are no Programs defined for the Card Definition, Relate provides a* **Click Here** Link *for adding a Program.*

The Program Creation Wizard opens with the Program Type step.

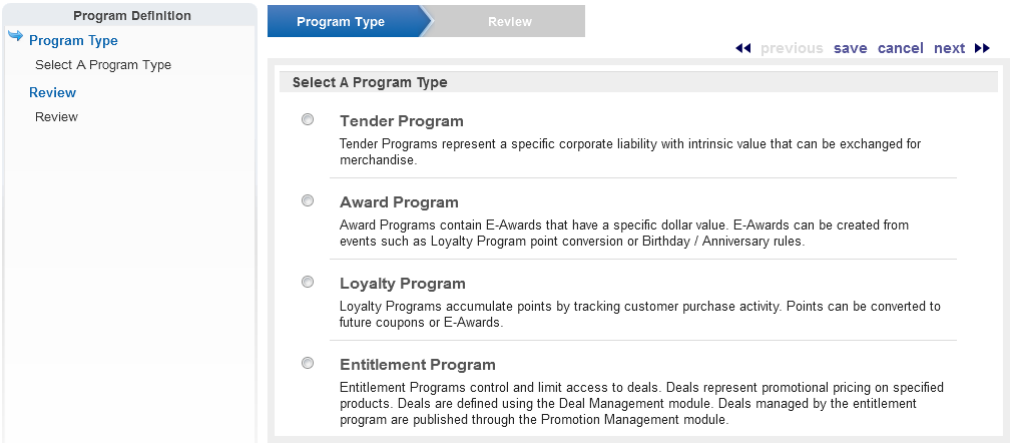


Figure 17-38: Create Program Wizard

2. Using the Radio Buttons, select the type of Program you are creating (see "Program Types" on page 484 for a description of each Type).
3. Click **next** to continue.

   The General step opens.

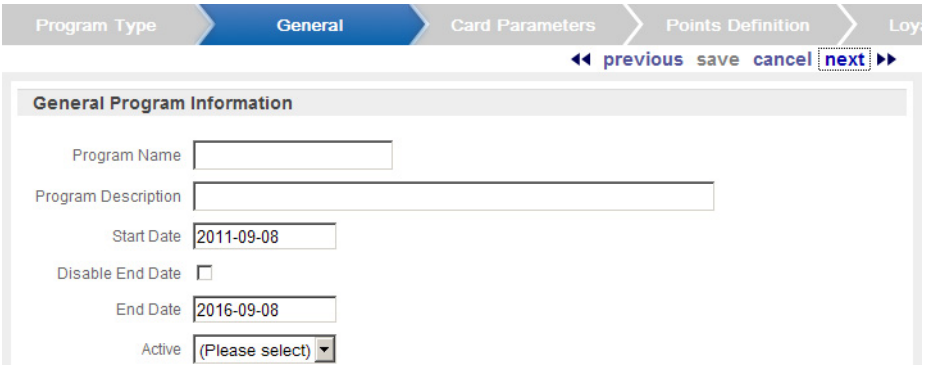


Figure 17-39: General Step

4. In the General step, enter the information for the Program.
   - **Program Name** - The name of the Program.

- **Program Description** - A description of the Program.
- **Start Date** - The date on which the Program starts; uses a Calendar Menu.
- **Disable End Date** - Determines whether the Program has an end date.
  - **Unchecked** - The Program has an end date.
  - **Checked** - The Program has no end date and will be valid forever.
- **End Date** - The date on which the Program ends; uses a Calendar Menu (only active if Disable End Date is unchecked).
- **Active** - Determines whether the Program will be immediately active on the Start Date.

5. Click **next** to continue with the correct procedure for the type of Program (selected in step 2).
   - **Tender Program** - Continue with "Create a Tender Program" on page 520.
   - **Loyalty Program** - Continue with "Create a Loyalty Program" on page 523.
   - **Award Program** - Continue with "Create an Award Program" on page 526.
   - **Entitlement Program** - Continue with "Create an Entitlement Program" on page 528.

Create a Tender Program

To create a Tender Program:

1. Perform the steps described in "Create New Program" on page 519.

   The Card Parameters step opens.

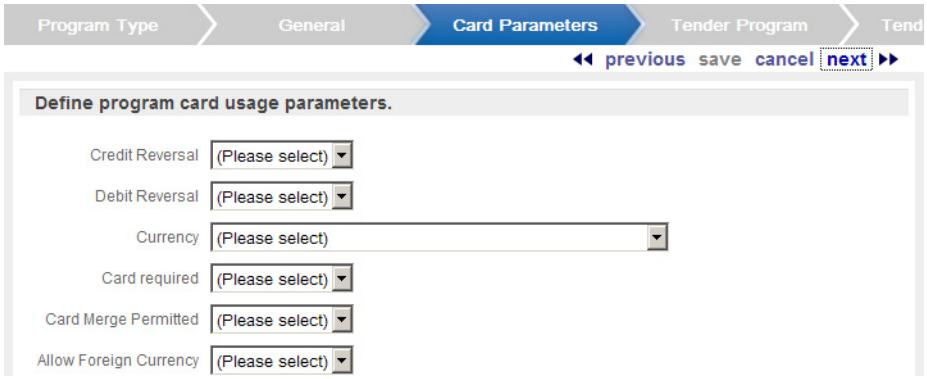


Figure 17-40: Card Parameters Step

2. Define the parameters for the Card:
   - **Credit Reversal** - Indicate whether credit reversals can be performed.
   - **Debit Reversal** - Indicate whether debit reversals can be performed.
   - **Currency** - Select the base currency for the Program.
   - **Card Required** - Indicate whether the customer must have their Card present to receive credit for a transaction.

- **Card Merge Permitted** - Indicate whether Card merges can be performed.
- **Allow Foreign Currency** - Indicate whether Customers will receive credit for transactions performed in foreign currencies.

3. Click **next** to continue.

   The Tender Program step opens.

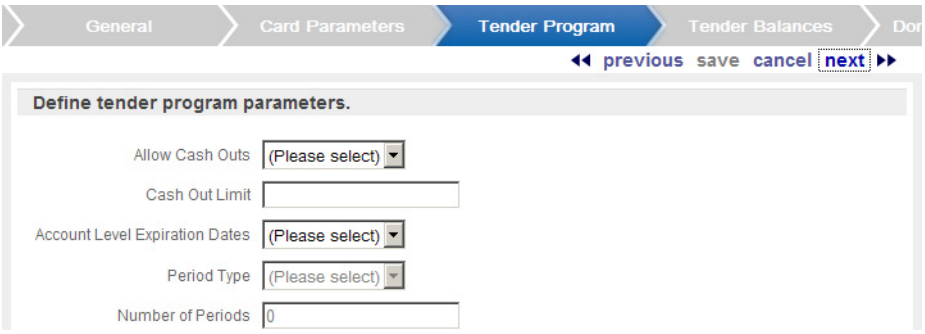


Figure 17-41: Tender Program Step

4. Define the parameters for the Tender Program:
   - **Allow Cash Outs** - Indicates whether the account can be redeemed for cash or an equivalent tender.
   - **Cash Out Limit** - Determines the limit for a Cash Out request (only active if Allow Cash Outs is set to **Yes**).
   - **Account Level Expiration Dates** - Determines whether the Tender Accounts will have expiration dates.
   - **Period Type** - Indicates the type of period used for the Account Level Expiration Date (only active if Account Level Expiration Dates is set to **Yes**).
   - **Number of Periods** - Determines the number of periods (selected in Period Type) that will pass before a Tender Account expires (only active if Account Level Expiration Dates is set to **Yes**).
5. Click **next** to continue.

   The Tender Balances step opens.

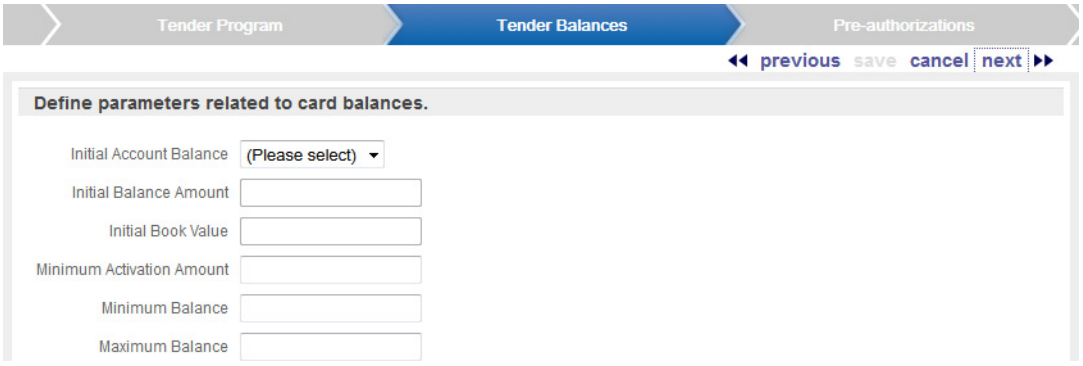


Figure 17-42: Tender Balances Step

6. Define the balance rules for the Tender Program:
   - **Initial Account Balance** - Indicates whether there is an initial balance on each account.
   - **Initial Balance Amount** - The amount of the initial balance (only active if Initial Account Balance is set to **Yes**).
   - **Initial Book Value** - The initial book value of the account (only active if Initial Account Balance is set to **Yes**).
   - **Minimum Activation Amount** - The minimum amount that can be in an Account for it to be activated.
   - **Minimum Balance** - The minimum amount that must be kept in an Account.
   - **Maximum Balance** - The maximum amount that can be put into the Account.
7. Click **next** to continue.

   The Preauthorizations step opens.

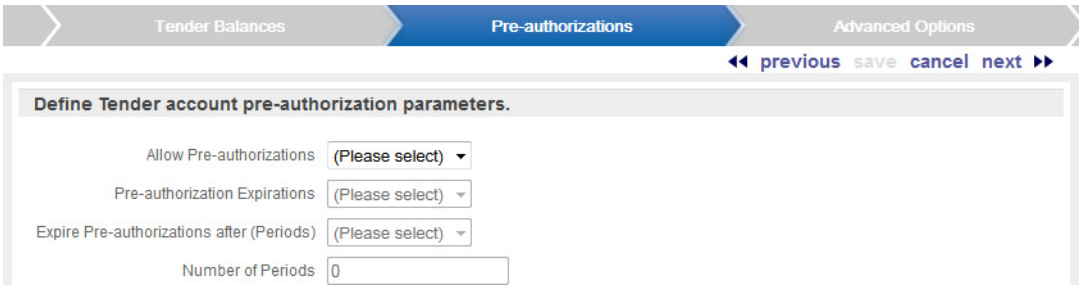


Figure 17-43: Preauthorizations Step

8. Define the pre-authorization rules for the Tender Program:
   - **Allow Pre-authorizations** - Indicates whether pre-authorizations are allowed for the Tender Accounts.
   - **Preauth Expirations** - Indicates whether pre-authorizations expire (only active if Preauth Expirations is set to **Yes**).
   - **Expire Pre-authorizations after (Periods)** - Indicates the type of period used for the pre-authorization expiration (only active if Allow Pre-authorizations and Preauth Expirations are both set to **Yes**).
   - **Number of Periods** - Determines the number of periods (selected in Expire Pre-authorizations after (Periods)) to pass, after which a pre-authorization expires (only active if Allow Pre-authorizations and Preauth Expirations are both set to **Yes**).
9. Click **next** to continue.

The Advanced Options step opens.

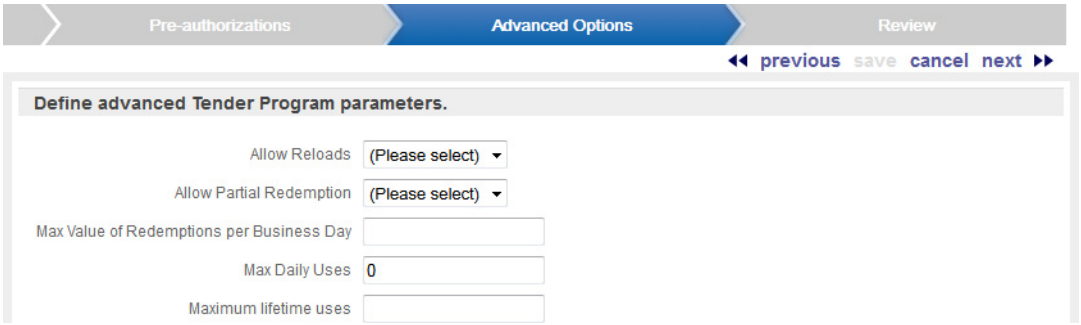


Figure 17-44: Advanced Options Step

10. Define the Advanced Options for the Tender Program:

- **Allow Reloads** - Indicates whether a Tender Account can be reloaded.
- **Allow Partial Redemption** - Indicates whether a balance on a Tender Account can be partially redeemed.
- **Max Value of Redemptions per Business Day** - The total amount of all redemptions that can be performed on a Tender Account in one day.
- **Max Daily Uses** - The total number of times that a Tender Account can be used in one day.
- **Maximum Lifetime Uses** - The total number of times that a Tender Account can be used over the lifetime of the account.

11. Click **next** to continue.

The Review step opens.

12. Review the entered information to ensure that it is correct.

- Click **save** to save the Program with the current settings and return to the Card Definition page.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to delete all information and return to the Card Definition page.

Create a Loyalty Program

To create a Loyalty Program:

1. Perform the steps described in "Create New Program" on page 519.

The Card Parameters step opens.

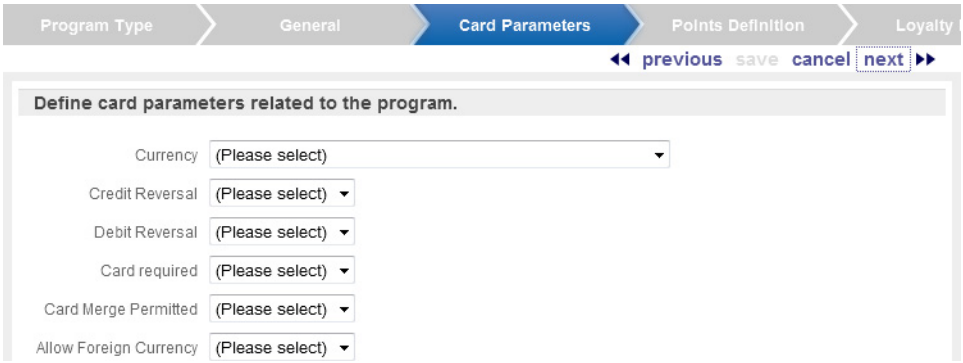


Figure 17-45: Card Parameters Step

2. Define the parameters for the Card:

- **Currency** - Base currency for the Program.
- **Credit Reversal** - Indicate whether credit reversals can be performed.
- **Debit Reversal** - Indicate whether debit reversals can be performed.
- **Card Required** - Indicate whether the customer must have their physical card present to receive credit for a transaction.
- **Card Merge Permitted** - Indicate whether Card Merges can be performed.
- **Allow Foreign Currency** - Indicate whether Customers will receive credit for transactions performed in foreign currencies.

3. Click **next** to continue.

The Points Definition step opens.

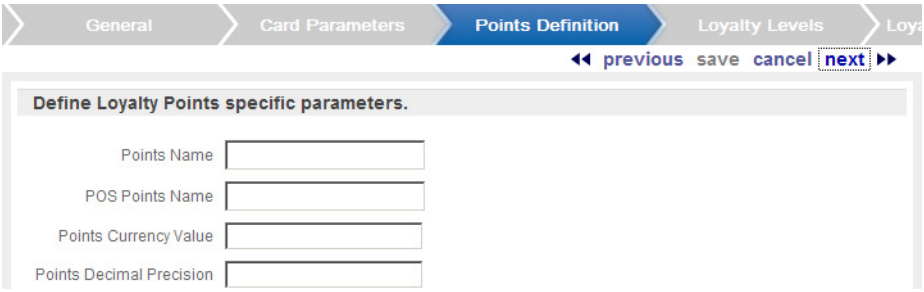


Figure 17-46: Points Definition Step

4. Define the parameters for the loyalty points:

- **Points Name** - The name used for the loyalty points.
- **POS Points Name** - The name for the points displayed on the POS system.
- **Points Currency Value** - The currency amount required to earn one (1) point.
- **Points Decimal Precision** - The number of decimal points used in tracking points.

5. Click **next** to continue.

The Loyalty Levels step opens.

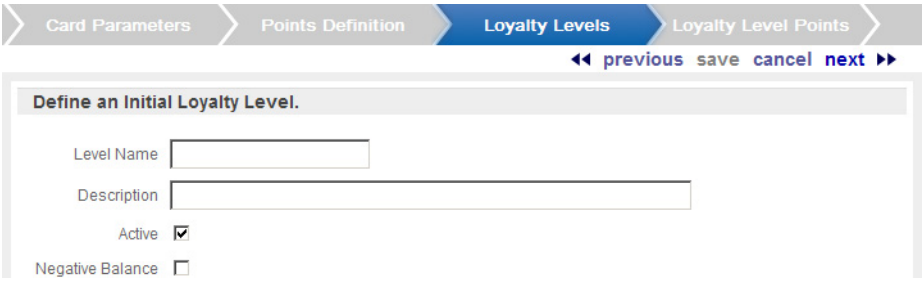


Figure 17-47: Loyalty Levels Step

6. Define the parameters for the initial loyalty level:

> *Only one loyalty level is created during this process. Further loyalty levels can be created in the procedure "Add a Loyalty Level" on page 497.*

- **Level Name** - The name of the loyalty level.
- **Description** - A description of the loyalty level.
- **Active** - Indicates whether the level will be active upon creation.
- **Negative Balance** - Indicates whether the loyalty level will allow negative balances.

7. Click **next** to continue.

The Loyalty Level Points step opens.

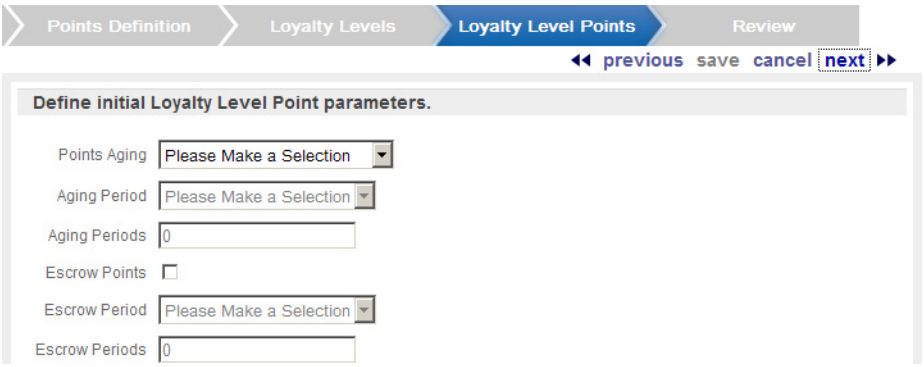


Figure 17-48: Loyalty Level Points Step

8. Define the parameters for the points issued by the initial loyalty level:

- **Points Aging** - Determines the method used for determining when points are reset. This parameter has the following options:
  - **Never Reset** - Points earned are retained until removed by an awards process.
  - **Reset after x periods** - If there is no account activity in the time specified, all points (escrow, earned, and bonus) are expired and points balances reset to zero after a defined period of time.

- **Reset after x rolling periods** - The expiration date for the points is calculated from the business date they are earned. If these points are not used, they are removed after a defined period of time, regardless of account activity.

- **Aging Period** - Indicates the type of period used for the Points Aging process (only active if Points Aging is set to **Reset after x periods** or **Reset after x rolling periods**).
- **Aging Periods** - Determines the number of periods (selected in Aging Period) that will pass before points are reset (only active if Points Aging is set to **Reset after x periods** or **Reset after x rolling periods**).
- **Escrow Points** - Indicates whether points are escrowed before they become available for use as Earned Points.
  - **Checked** - Points are held as Escrow Points for a define period of time, after which they become available for use as Earned Points.
  - **Unchecked** - Points are immediately available for use as Earned Points.
- **Escrow Period** - Indicates the type of period used to determine the escrow time (only active if Escrow Points is **Checked**).
- **Escrow Periods** - Determines the number of periods (selected in Period Type) that will pass before points are made available (only active if Escrow Points is **Checked**).

9. Click **next**.

The Review Step opens.

10. Review the entered information to ensure that it is correct.

- Click **save** to save the Program with the current settings and return to the Card Definition page.
- Use Wizard Navigation to return to an earlier step and make any necessary changes.
- Click **cancel** to delete all information and return to the Card Definition page.

11. If necessary, add Loyalty Levels to the Program. See "Add a Loyalty Level" on page 497 for more information.

12. Create the Rules for the Loyalty Level(s). See the following procedures for instructions:

- If the Program will have multiple Loyalty Levels, perform "Add a Loyalty Level" on page 497 and "Add Movement Rule" on page 513.
- "Add Issue Rule" on page 502
- "Add Award Rule" on page 509

Create an Award Program

To create an Award Program:

1. Perform the steps described in "Create New Program" on page 519.

The Card Parameters step opens.

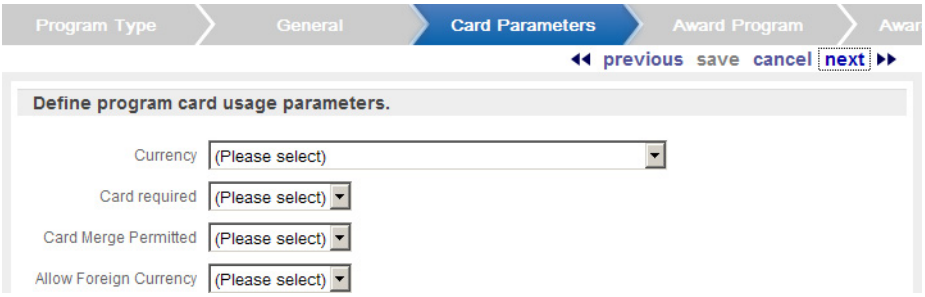


Figure 17-49: Card Parameters Step

2. Define the parameters for the Card:

- **Currency** - Select the base currency for the Program.
- **Card Required** - Indicate whether the customer must have the physical card present to receive credit for a transaction.
- **Card Merge Permitted** - Indicate whether Card Merges can be performed.
- **Allow Foreign Currency** - Indicate whether Customers will receive credit for transactions performed in foreign currencies.

3. Click **next** to continue.

The Award Program step opens.

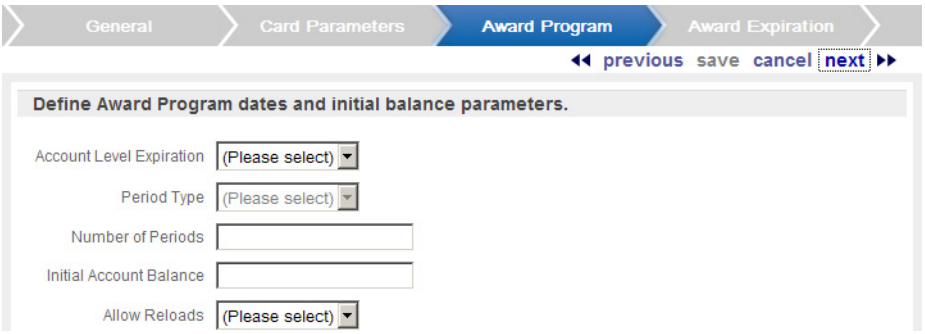


Figure 17-50: Award Program Step

4. Define the Award Program parameters:

- **Account Level Expiration** - Indicates whether awards will expire after a defined period of time.
- **Period Type** - Indicates the type of period used to determine the award expiration time (only active if Account Level Expiration is set to **Yes**).
- **Number of Periods** - Determines the number of periods (selected in Period Type) that will pass before an award expires (only active if Account Level Expiration is set to **Yes**).
- **Initial Account Balance** - The initial balance of each account.
- **Allow Reloads** - Indicates whether the account can be reloaded.

5. Click **next** to continue.

   The Award Expiration step opens.

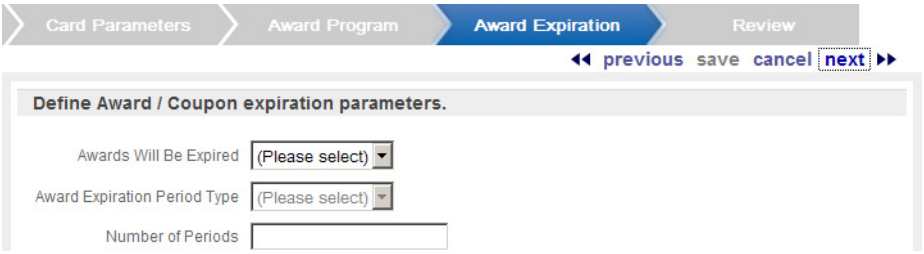


Figure 17-51: Award Expiration Step

6. Define the Award Expiration parameters:
   - **Awards Will be Expired** - Determines the method used for determining when awards are reset. This parameter has the following options:
     - **None** - Awards earned are retained until removed.
     - **Fixed** - If there is no account activity in the time specified, all awards are expired and balances reset to zero after a defined period of time.
     - **Rolling X** - The expiration date for awards is calculated from the business date they are earned. If these awards are not used, they are removed after a defined period of time, regardless of account activity.
   - **Award Expiration Period Type** - Indicates the type of period used for determining the time period of the award expiration (only active if Awards Will be Expired is set to **Fixed** or **Rolling X**).
   - **Number of Periods** - Indicates the number of periods (defined in Award Expiration Period Type) that will pass before awards will be expired (only active if Awards Will be Expired is set to **Fixed** or **Rolling X**).
7. Click **next** to continue.

   The Review step opens.
8. Review the entered information to ensure that it is correct.
   - Click **save** to save the Program with the current settings and return to the Card Definition page.
   - Use Wizard Navigation to return to an earlier step and make any necessary changes.
   - Click **cancel** to delete all information and return to the Card Definition page.

Create an Entitlement Program

To create an Entitlement Program:

1. Perform the steps described in "Create New Program" on page 519.

The Entitlement Program step opens.

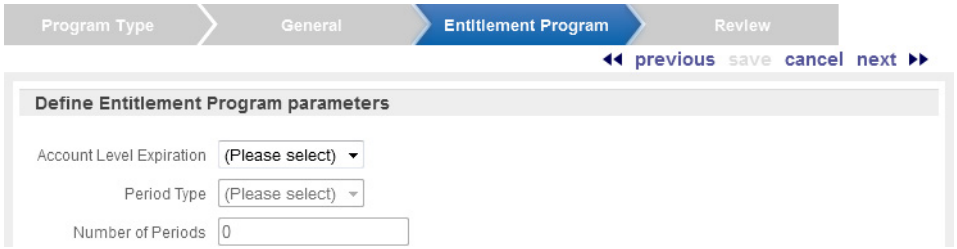


Figure 17-52: Entitlement Program Step

2. Define the parameters for the Entitlement Program:
   - ❑ **Account Level Expiration** - This Selection Menu determines whether
   - ❑ **Period Type** - Indicates the type of period used to determine when an Entitlement Account expires (only active if Account Level Expiration is set to **Yes**).
   - ❑ **Number of Periods** - Determines the number of periods (selected in Period Type) that will pass before an Entitlement Account expires (only active if Account Level Expiration is set to **Yes**).
3. Click **next** to continue.

   The Review step opens.
4. Review the entered information to ensure that it is correct.
   - ❑ Click **save** to save the Program with the current settings and return to the Card Definition page.
   - ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
   - ❑ Click **cancel** to delete all information and return to the Card Definition page.
5. Crate the Entitlement Deal(s) for the Entitlement Program. See "Create Entitlement Deal" on page 518.

CHAPTER 18

Card/Account Administration

Overview

The Card/Account Administration page provides Users with access to Cards issued to Customers, and the Accounts associated with those Cards. Users can then view information about that Card or Account, or make any necessary changes to that Card or Account.

About this Chapter

This chapter contains the following information:

- "Card/Account Search" on page 531 - Describes the procedure for searching for a Card and its associated Account(s).
- "Card/Account Administration" on page 532 - Provides information and procedures for managing Cards and Accounts.

Card/Account Search

The Card/Account Search page uses Card-specific or Account-specific information to locate a Card to open in Card/Account Administration.

To perform a Card/Account search:

1. Select the **Account->Card/Account Admin** menu option, or select the **Card/Account Admin** Link on the Main Page.

   The Card/Account Search page opens.

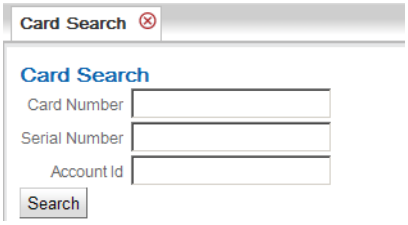


Figure 18-1: Card/Account Search Page

2. In the Card/Account Search page, enter the search information for the Card or Account:
   - **Card Number** - Card Number for the Card.
   - **Serial Number** - Serial Number for the Card.
   - **Account Number** - Account Number for an Account associated with a Card.

> *If you enter search criteria in more than one field, the information in the different fields must be associated with the same Card; otherwise, the search fails.*

3. Click the **Search** button, or press [Enter].
   - If a Card matches the entered criteria, the Card opens in Card/Account Administration.

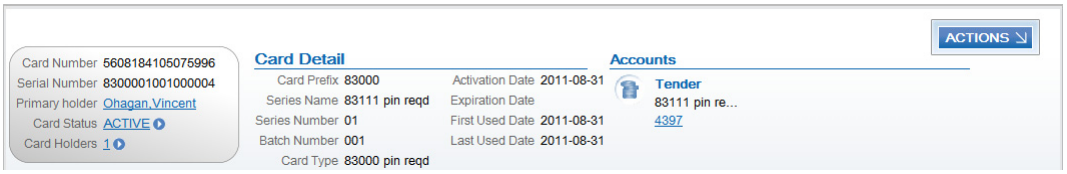


Figure 18-2: Card/Account Administration

   - If no Card is found matching the entered criteria, an error message displays and no Card opens.



Figure 18-3: Card Not Found Error Message

Open a Customer Card

You can also open a Card through a Customer record. See "Customer Lookup/Edit" on page 70 for instructions on opening a Customer record, and "Open Card" on page 80 for instructions on opening a Customer Card in Card Administration.

Card/Account Administration

The Card Administration page displays information about individual Cards and provides access to functions that can be performed on the Card and its associated Account(s).

Basic Card/Account Information

The upper portion of the Card/Account Administration page displays basic information about the Card and the Accounts associated with the Card. This information is always displayed in Card/Account Administration.



Figure 18-4: Basic Card/Account Information

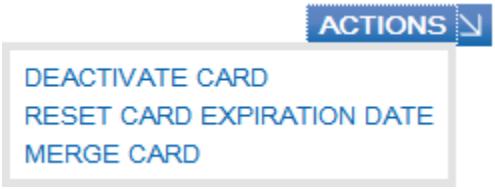
This area displays the following information:

- **Card Information** - Basic information about the Card. This includes the following information:
  - **Card Number** - Card Number for the Card.
  - **Serial Number** - Serial Number for the Card.
  - **Primary holder** - Name of Customer designated as the primary holder of the Card.
  - **Card Status** - Current status of the Card.
  - **Card Holders** - Total number of Customers assigned to this Card.
- **Card Detail** - Detailed information about the Card. This includes the following information:
  - **Card Prefix** - Prefix used for the Serial Number of the Card.
  - **Series Name** - Name of the Card Series to which the Card belongs.
  - **Series Number** - Series Number for the Card Series to which the Card belongs.
  - **Batch Number** - Batch Number for the Batch to which the Card belongs.
  - **Card Type** - Type of Card.
  - **Activation Date** - Date on which the Card was/is activated.
  - **Expiration Date** - Date on which the Card expires.
  - **First Used Date** - Date on which the Card was first used.
  - **Last Used Date** - Most recent date on which the Card was used.

- **Accounts** - Displays the Accounts associated with the Card.
  - **Account Type** - Type of Account (Tender, Award, or Loyalty).
  - **Account Name** - Name of the Account.
  - **Account Number** - Account Number for the Account.

Actions Menu

The Actions Menu for the Card/Account Administration page has the following options:



- **ACTIVATE CARD** - Activate an inactive Card (only shown for inactive Cards). See "Activate Card" on page 534.
- **DEACTIVATE CARD** - Deactivate an active Card (only shown for active Cards). See "Deactivate Card" on page 535.
- **RESET CARD EXPIRATION DATE** - Set a new expiration date for the card. See "Set New Card Expiration Date" on page 536.
- **MERGE CARD** - Merge the Card with another Card. See "Merge Card" on page 537.
- Account-specific options that depend upon the type of Account selected.

Open Customer Record

To open the Customer Record for the Customer associated with the Card, do one of the following:

- Click the name of the **Primary holder**. The Customer Record of the primary holder opens in the Customer Dashboard.
- Click the number of Card Holders to open a menu containing a menu of all of the Customers associated with the Card. Click the name in the menu to open the Customer Record in the Customer Dashboard.



Activate Card

There are two methods for activating an inactive Card:

- "Through the Actions Menu" on page 534
- "Using the Card Status Link" on page 534

Through the Actions Menu

1. Click **ACTIVATE CARD** in the Actions Menu.

   A Perform Action: Activate Card Window opens.

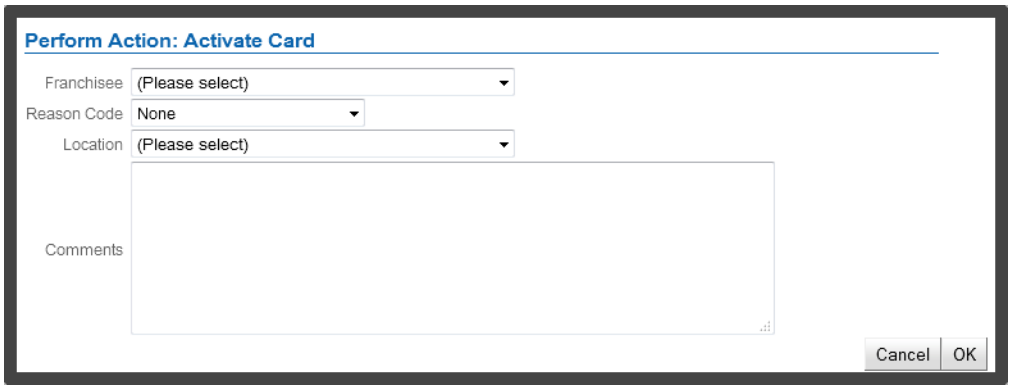


Figure 18-5: Perform Action: Activate Card Window

2. Select the **Franchisee** associated with the card, if Franchises are enabled.
3. Select the **Location** where the activation is being performed.
4. Enter **Comments** describing the reason for activating the Card.
5. Click **OK** to close the Window and activate the Card, or click **Cancel** to close the Window and keep the Card inactive.

Using the Card Status Link

1. Click the **INACTIVE** Card Status Link to open the Card Status menu.

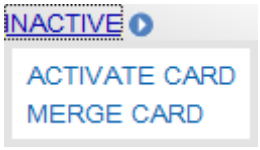


Figure 18-6: Card Status Menu

2. Click **ACTIVATE CARD**.

   A Perform Action: Activate Card Window opens (see Figure 18-5).

3. Enter the activation information for the Card:

> *The fields available in the Activate Card Window may be different, depending upon the configuration and current status of the Series to which it belongs.*

- **Tender Activation Amount** - The amount issued by the activation of the Tender Account.
- **Loyalty Activation Points** - The number of points issued at the activation of the Loyalty Account.
- **Award Activation Coupon Amount** - The amount of the Coupon issued by the activation of an Award Account.
- **Currency** - The currency used for the Tender Activation Amount and/or the Award Activation Coupon Amount.
- **Franchisee** - The Franchisee associated with the Card.
- **Reason Code** - The reason for activating the Card.
- **Location** - The Location where the activation is being performed.
- **Comments** - Comments describing the reason for activating the Card.

4. Click **OK** to close the Window and activate the Card, or click **Cancel** to close the Window and keep the Card inactive.

Deactivate Card

There are two methods for deactivating an active Card:

- "Through the Actions Menu" on page 535
- "Using the Card Status Link" on page 536

Through the Actions Menu

1. Click **DEACTIVATE CARD** in the Actions Menu.

   A Perform Action: Deactivate Card Window opens.

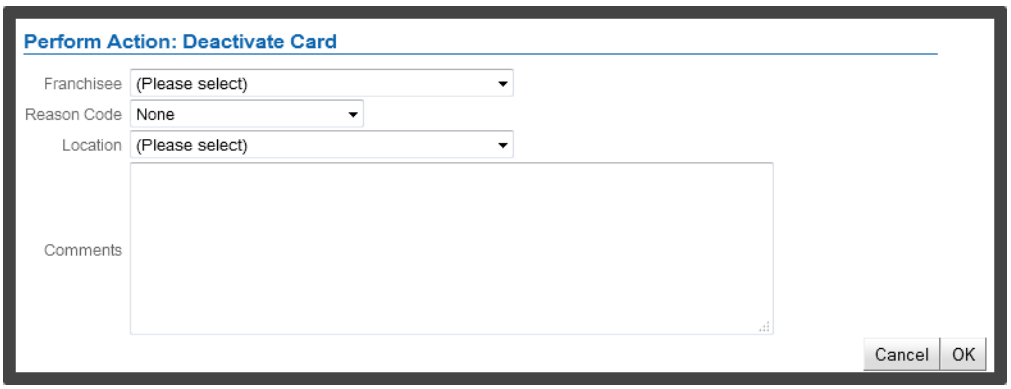


Figure 18-7: Perform Action: Deactivate Card Window

2. Select the **Franchisee** associated with the card, if Franchises are enabled.
3. Select the **Location** where the deactivation is being performed.
4. Enter **Comments** describing the reason for deactivating the Card.
5. Click **OK** to close the Window and deactivate the Card, or click **Cancel** to close the Window and keep the Card active.

Using the Card Status Link

1. Click the **ACTIVE** Card Status Link to open the Card Status menu.

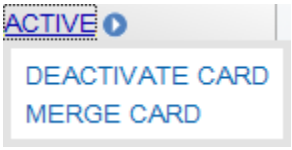


Figure 18-8: Card Status Menu

2. Click **DEACTIVATE CARD**.

   A Perform Action: Deactivate Card Window opens (see Figure 18-7).
3. Use the **Franchisee** Selection Menu to select the Franchisee to associate with the Card, if Franchises are enabled.
4. Use the **Reason Code** Selection Menu to select the reason for deactivating the Card.
5. Use the **Location** Selection Menu to select where the deactivation is being performed.
6. Enter **Comments** describing the reason for deactivating the Card.
7. Click **OK** to close the Window and deactivate the Card, or click **Cancel** to close the Window and keep the Card active.

Set New Card Expiration Date

Expiration dates can be set on individual Cards in Relate. To set a new expiration date for an individual Card:

1. Click **RESET CARD EXPIRATION DATE** in the Actions Menu.

   A Reset Card Expiration Date Window opens.



Figure 18-9: Reset Card Expiration Date Window

2. Use the Reset Card Expiration Date Calendar Menu, select the new expiration date for the Card.
3. Click **OK** to change the Card Expiration Date to the new value and close the Window, or click **Cancel** to close the Window without saving.

Merge Card

To merge a Card with another Card:

1. Click **MERGE CARD** in the Actions Menu.

   A Merge Card Window opens.

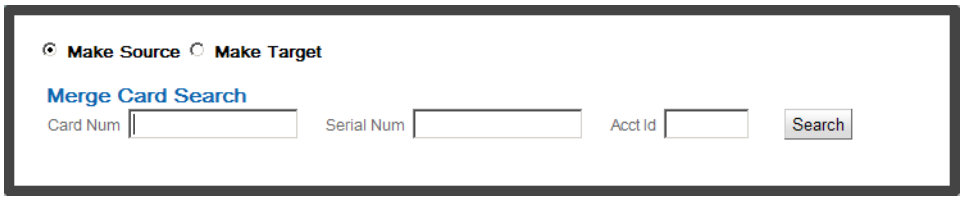


Figure 18-10: Merge Card Window

2. Using the Radio Buttons, select how to merge the Cards:
   - **Make Source** - The current Card will be the source for Card information.
   - **Make Target** - The Card selected for merge will be the target for Card information.
3. Enter the Merge Card Search information:
   - **Card Num** - The Card Number for the Card.
   - **Serial Num** - The Serial Number for the Card.
   - **Acct Id** - The ID for the Account.



If information is entered into more than one field, the information in each field must match the same Card. If the information is associated with different Cards, the search will not return any results.

4. Click **Search**.
   - If a Card matching the search criteria was found, the Card will be displayed in a List. Continue with the next step.
   - If no Cards matching the search criteria are found, an error message appears and no Cards are listed. Return to step 3.
5. To complete the merge, click to put a check mark (☑) in the **Merge Card** Check Box, then click the **Merge** button. The Cards are merged and the Window closes.

   To exit the Window without merging the Cards, click **Cancel**.

Account Information

Click the Account Number Link to view information about a specific Account. The information displayed for each Account depends upon its Account type.

Tender Account

The following information is displayed for each Tender Account:

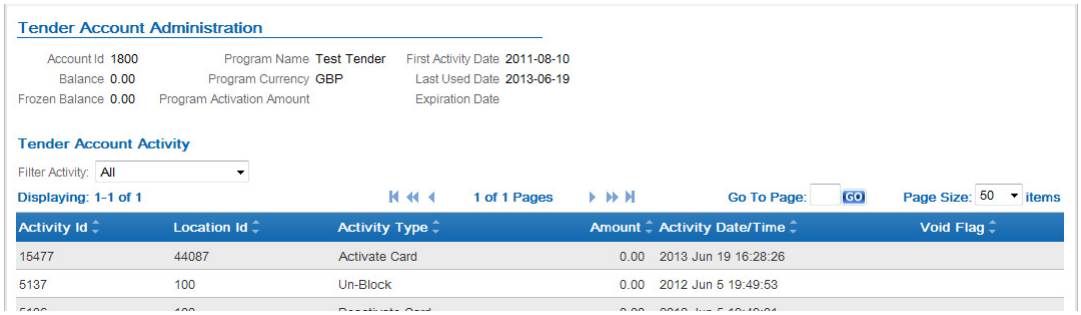
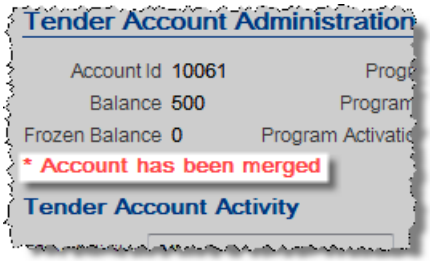


Figure 18-11: Tender Account Information

- **Tender Account Administration** - Displays information about the Tender Account. This area includes the following information:
  - **Account Id** - ID number for the Account.
  - **Balance** - Current tender balance of the Account.
  - **Frozen Balance** - Balance of the Account that is currently frozen.
  - **Program Name** - Name of the Program to which the Account belongs.
  - **Program Currency** - Base currency for the Program.
  - **Program Activation Amount** - Amount required by the Program to activate an Account.
  - **First Activity Date** - Date of the first activity on the Account.
  - **Last Used Date** - Date of the most recent activity on the Account.
  - **Expiration Date** - Date on which the Account expires.



If the Tender Account was merged with another Account, Relate will display the message "Account has been merged" below the Tender Account Administration area.



- **Tender Account Activity** - A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Activity Menu.

  This List uses Page Navigation to organize the actions.

The following information is displayed for each Account action:

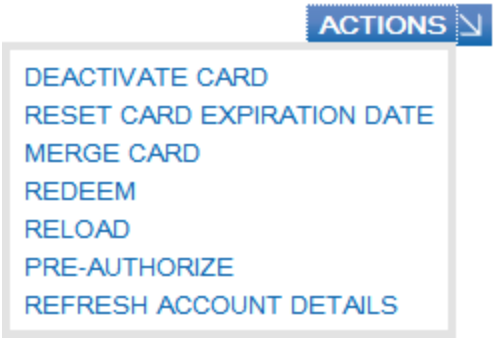
- **Activity Id** - ID of the activity on the Account.
- **Location Id** - ID of the location where the activity occurred.
- **Activity Type** - Type of activity performed.
- **Amount** - Amount applied to the Account by the activity.
- **Activity Date/Time** - Date and time of the activity.
- **Void Flag** - Indicates whether the activity was voided.

Filter Activity Menu

The Filter Activity menu is a Filter for the Tender Account Activity List. This Selection Menu filters the Tender Account Activity List by Activity Type.

Actions Menu

The Actions Menu for Tender Accounts will display the following options:



- **ACTIVATE CARD** - Activate an inactive Card (only shown for inactive Cards). See "Activate Card" on page 534.
- **DEACTIVATE CARD** - Deactivate an active Card (only shown for active Cards). See "Deactivate Card" on page 535.
- **RESET CARD EXPIRATION DATE** - Set a new expiration date for the card. See "Set New Card Expiration Date" on page 536.
- **MERGE CARD** - Merge the Card with another Card. See "Merge Card" on page 537.
- **REDEEM** - Redeem an existing amount from the balance on the Card. See "Redeem an Amount" on page 540.
- **RELOAD** - Reload the Card with an additional amount. See "Reload a Card" on page 541.
- **PRE-AUTHORIZE** - Pre-authorize an amount on the Card. See "Pre-Authorize an Amount" on page 542.
- **REFRESH ACCOUNT DETAILS** - Refresh/Reload the information displayed for the Account.

Redeem an Amount

To redeem an amount from a Card:

1. Click **REDEEM** in the Actions Menu for a Tender Account.

   A Perform Action: Redeem Window opens.

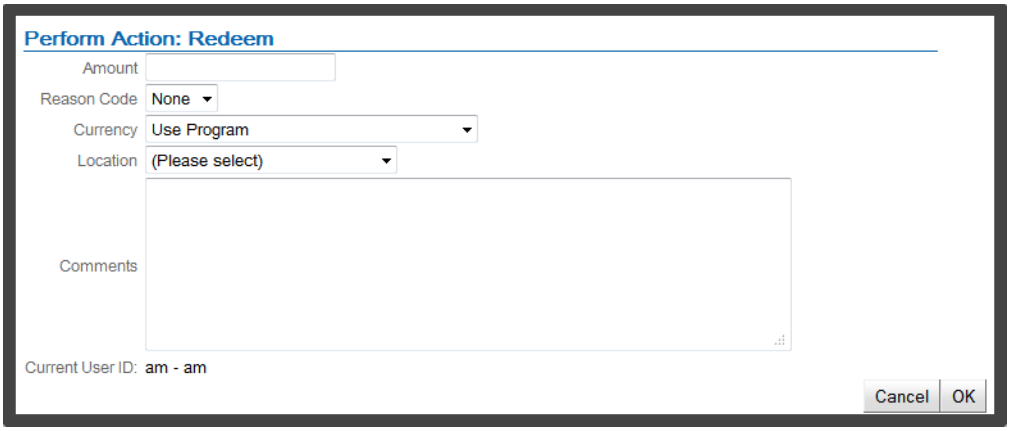


Figure 18-12: Perform Action: Redeem Window

2. Enter the information for the redemption:
   - **Amount** - The amount to be redeemed.
   - **Reason Code** - Use the Selection Menu to select the reason for the redemption.
   - **Currency** - Use the Selection Menu to select the currency in which to redeem the amount, or select **Use Program** **[DEFAULT]** to use the base currency for the program. *This field can only be changed in Tender Programs that allow foreign currencies.*
   - **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
   - **Location** - Use the Selection Menu to select the location where the redemption is being performed.
   - **Comments** - Enter any comments describing the redemption.
3. Click **OK** to perform the redemption and close the Window, or click **Cancel** to close the Window without redeeming an amount.

Reload a Card

To reload a Card with an amount:

1. Click **RELOAD** in the Actions Menu for a Tender Account.

   A Perform Action: Reload Window opens.

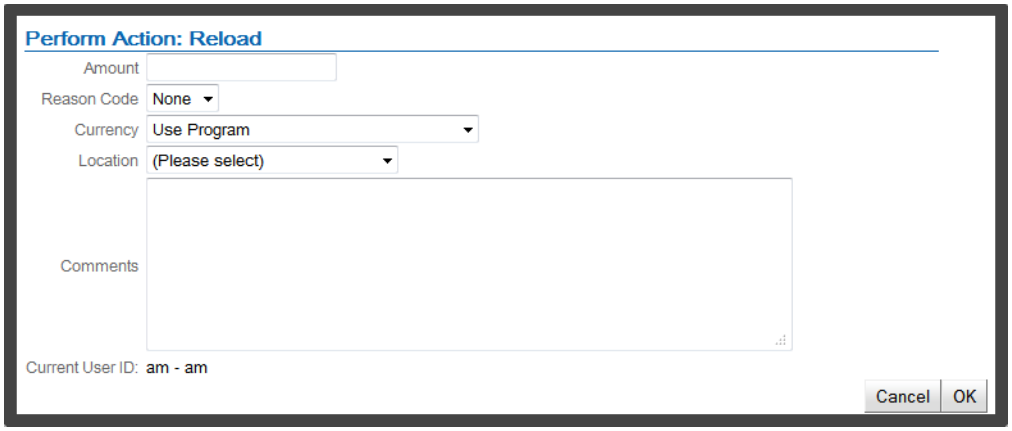


Figure 18-13: Perform Action: Reload Window

2. Enter the information for the reload:
   - **Amount** - The amount to be loaded onto the Card.
   - **Reason Code** - Use the Selection Menu to select the reason for the reload.
   - **Currency** - Use the Selection Menu to select the currency in which to reload the amount, or select **Use Program** **[DEFAULT]** to use the base currency for the program. *This option can only be changed in Tender Programs that allow foreign currencies.*
   - **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
   - **Location** - Use the Selection Menu to select the location where the reload is being performed.
   - **Comments** - Enter any comments describing the reload.
3. Click **OK** to perform the reload and close the Window, or click **Cancel** to close the Window without reloading the Card.

Pre-Authorize an Amount

To pre-authorize an amount on a Card:

1. Click **PRE-AUTHORIZE** in the Actions Menu for a Tender Account.

   A Perform Action: Pre-Authorize Window opens.

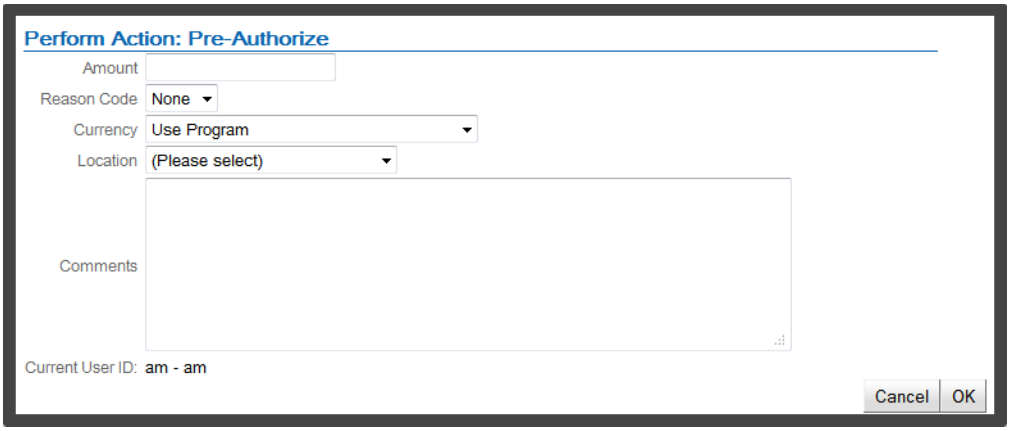


Figure 18-14: Perform Action: Pre-Authorize Window

2. Enter the information for the pre-authorization:
   - ❑ **Amount** - The amount to be pre-authorized for the Card.
   - ❑ **Reason Code** - Use the Selection Menu to select the reason for the pre-authorization.
   - ❑ **Currency** - Use the Selection Menu to select the currency in which to pre-authorize the amount, or select **Use Program** **[DEFAULT]** to use the base currency for the program. *This option is only available for Tender Programs that allow foreign currencies.*
   - ❑ **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
   - ❑ **Location** - Use the Selection Menu to select the location where the pre-authorization is being performed.
   - ❑ **Comments** - Enter any comments describing the pre-authorization.
3. Click **OK** to perform the pre-authorization and close the Window, or click **Cancel** to close the Window without pre-authorizing an amount.

Activity Detail Window

Click an activity to view detailed information about an activity in the List of activities displayed for an Account. The activity displays in the Activity Detail Window.

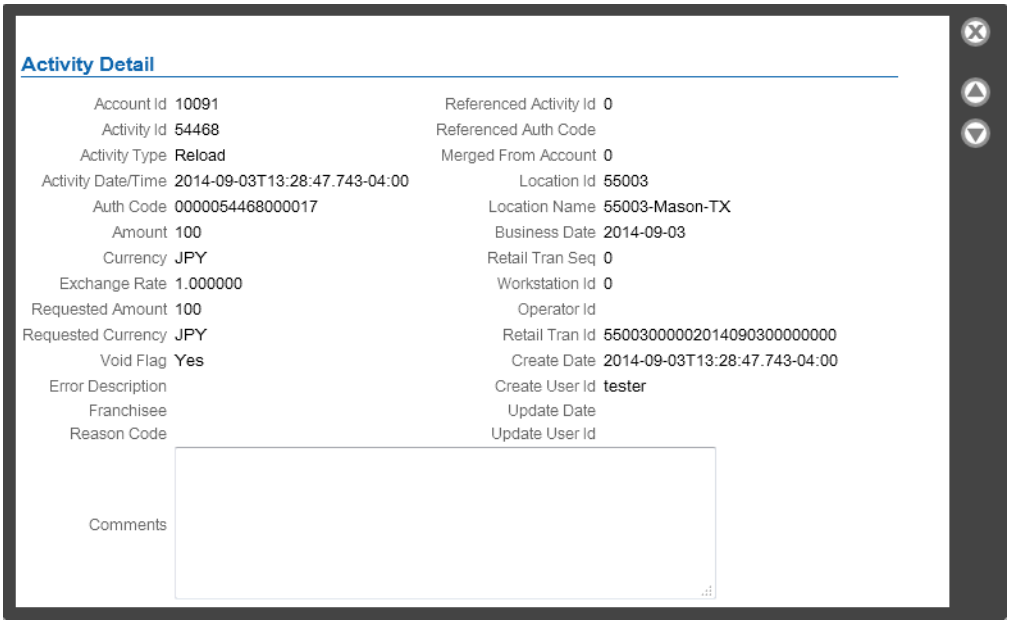


Figure 18-15: Activity Detail Window

The Activity Detail Window displays the following information for the selected activity:

- **Account Id** - ID number for the Account associated with the activity.
- **Activity Id** - ID of the activity on the Account.
- **Activity Type** - Type of activity performed.
- **Activity Date/Time** - Date and time of the activity.
- **Auth Code** - Authorization Code used by the activity.
- **Amount** - Amount applied to the Card by the activity.
- **Currency** - Currency used for the amount, if different from the base currency.
- **Exchange Rate** - If the transaction was performed in a foreign currency, the exchange rate between the foreign currency and the Account's base currency.
- **Requested Amount** - Requested currency amount.
- **Requested Currency** - Currency used for the requested amount, if different from the base currency.
- **Void Flag** - Indicates whether the activity was voided.
- **Error Description** - If an error occurred during the activity, a description of the error.
- **Franchisee** - Franchisee associated with the activity.
- **Reason Code** - Reason for the activity.
- **Referenced Activity Id** - ID of an activity to which this activity refers.

- **Referenced Auth Code** - Authorization Code used by the Referenced Activity.
- **Merged From Account** - If the Account was moved from another Account by a Card Merge, the ID number of the Account previously associated with the activity.
- **Location Id** - ID of the Location where the activity was performed.
- **Location Name** - Name of the Location where the activity was performed.
- **Franchisee** - Name of the Franchisee.
- **Business Date** - Business date of the activity.
- **Retail Tran Seq** - Sequence number of the activity within a retail transaction.
- **Workstation Id** - ID of the workstation (within the Location) where the activity was performed.
- **Retail Tran Id** - ID of the retail transaction of the activity. This field provides a Link to the Transaction in the Customer's Transaction History.
- **Create Date** - Date on which the activity was created.
- **Create User Id** - ID of the user who created the activity.
- **Update Date** - Date on which the activity was most recently updated.
- **Update User Id** - ID of the last user to update the activity.
- **Comments** - Additional comments entered about the activity.

Actions Menu

The Actions Menu in the Activity Detail Window for a Tender Account has the following options:



- **VOID** - Voids the open activity (see "Void an Activity" on page 545).
- **REVERSE** - Reverses the open activity (see "Reverse an Activity" on page 546).

Void an Activity

To void an activity on an Account:

1. Open the activity in the Activity Detail Window.
2. In the Activity Detail Window, select **VOID** in the Actions Menu.

   A Perform Action: Void Window opens.

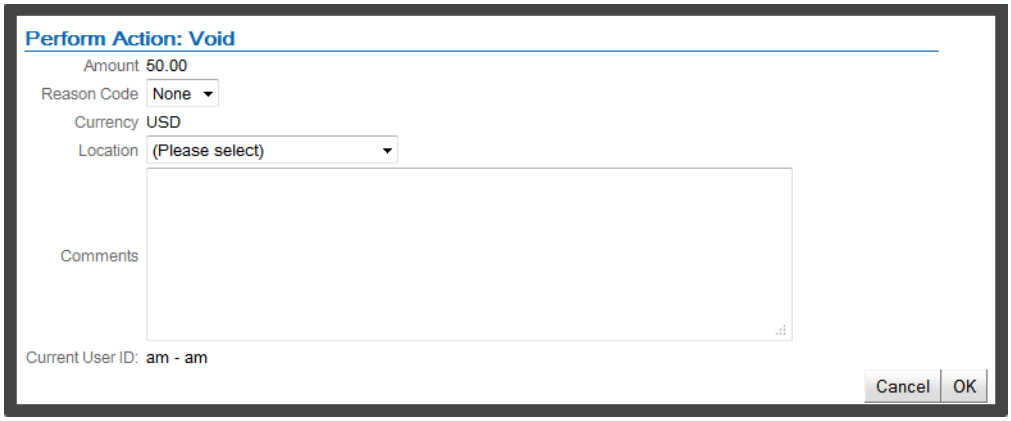


Figure 18-16: Perform Action: Void Window

3. Select the **Reason Code** for the Void in the Selection Menu.
4. Select the **Location** to be used for the Void in the Selection Menu.
5. Enter **Comments** describing the reasons for the Void.
6. Click the **OK** button to void the activity and close the Window, or click the **Cancel** button to close the Window without voiding the activity.

Reverse an Activity

To reverse an activity on an Account:

1. Open the activity in the Activity Detail Window.
2. In the Activity Detail Window, select **Reverse** in the Actions Menu.

   A Perform Action: Reverse Window opens.

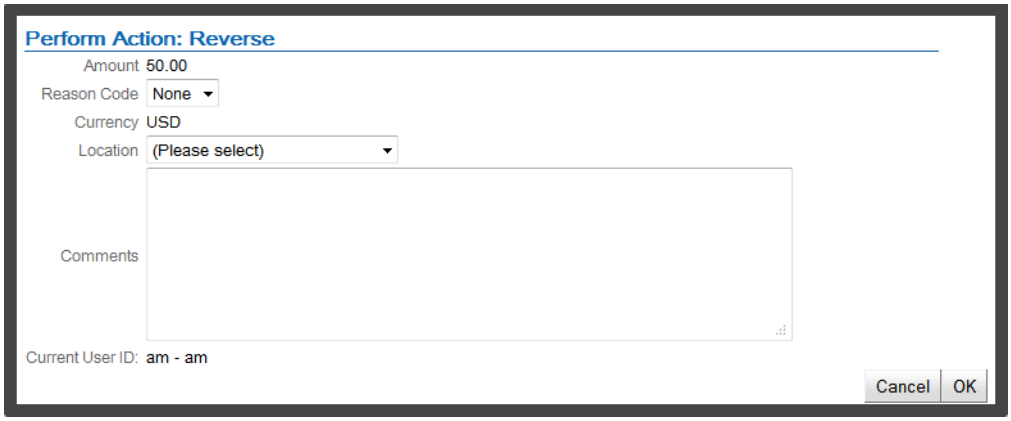


Figure 18-17: Perform Action: Reverse Window

3. Select the **Reason Code** for the Reverse in the Selection Menu.
4. Select the **Location** to be used for the Reverse in the Selection Menu.
5. Select the **Franchisee** in the Selection Menu.
6. Enter **Comments** describing the reasons for the Reverse.
7. Click the **OK** button to reverse the activity and close the Window, or click the **Cancel** button to close the Window without reversing the activity.

Award Account

The following information is displayed for each Award Account:

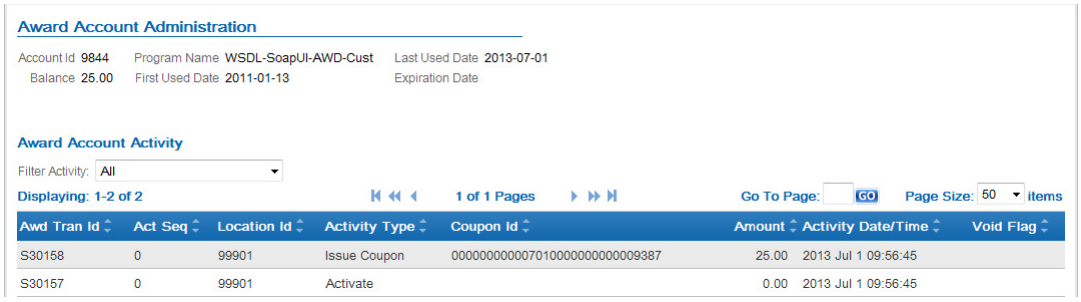
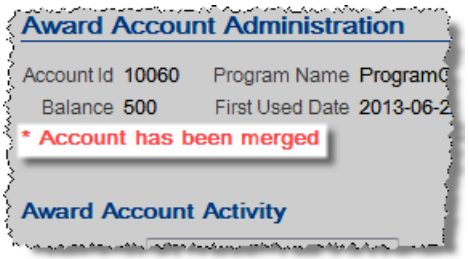


Figure 18-18: Award Account Information

- **Award Account Administration** - Displays information about the Award Account. This area includes the following information:
  - **Account Id** - ID number for the Account.

- **Balance** - Current award balance of the Account.
- **Program Name** - Name of the Program to which the Account belongs.
- **First Used Date** - Date of the first activity on the Account.
- **Last Used Date** - Date of the most recent activity on the Account.
- **Expiration Date** - Date on which the Account expires.

If the Award Account was merged with another Account, Relate will display the message "Account has been merged" below the Award Account Administration area.



- **Award Account Activity** - A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Activity Menu.

  This List uses Page Navigation to organize the actions.

  The following information is displayed for each Account action:

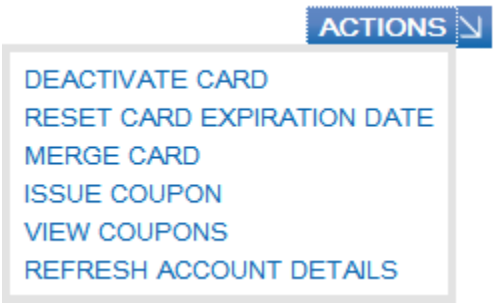
  - **Awd Tran Id** - Transaction ID of the activity on Account.
  - **Act Seq** - Sequence number of the activity within the transaction.
  - **Location Id** - ID of the location where the activity occurred.
  - **Activity Type** - Type of activity performed.
  - **Coupon Id** - ID number for the coupon (if any) created or redeemed by the activity.
  - **Amount** - Amount applied to the Account by the activity.
  - **Activity Date/Time** - Date and time of the activity.
  - **Void Flag** - Indicates whether the activity was voided.

Filter Activity Menu

The Filter Activity menu is a Filter for the Award Account Activity List. This Selection Menu filters the Award Account Activity List by Activity Type.

Actions Menu

The Actions Menu for the Award Account will display the following options:



- **ACTIVATE CARD** - Activate an inactive Card (only shown for inactive Cards). See "Activate Card" on page 534.
- **DEACTIVATE CARD** - Deactivate an active Card (only shown for active Cards). See "Deactivate Card" on page 535.
- **RESET CARD EXPIRATION DATE** - Set a new expiration date for the card. See "Set New Card Expiration Date" on page 536.
- **MERGE CARD** - Merge the Card with another Card. See "Merge Card" on page 537.
- **ISSUE COUPON** - Issue a Coupon to the Customer. See "Issue a Coupon" on page 548.
- **VIEW COUPONS** - View the Coupons that have been issued by the Award Account to the Customer. See "View Coupons" on page 549.
- **REFRESH ACCOUNT DETAILS** - Refresh/Reload the information displayed for the Account.

Issue a Coupon

To issue a Coupon to a Customer through an Award Account:

1. Click **ISSUE COUPON** in the Actions Menu.

   A Perform Action: Issue Coupon Window opens.

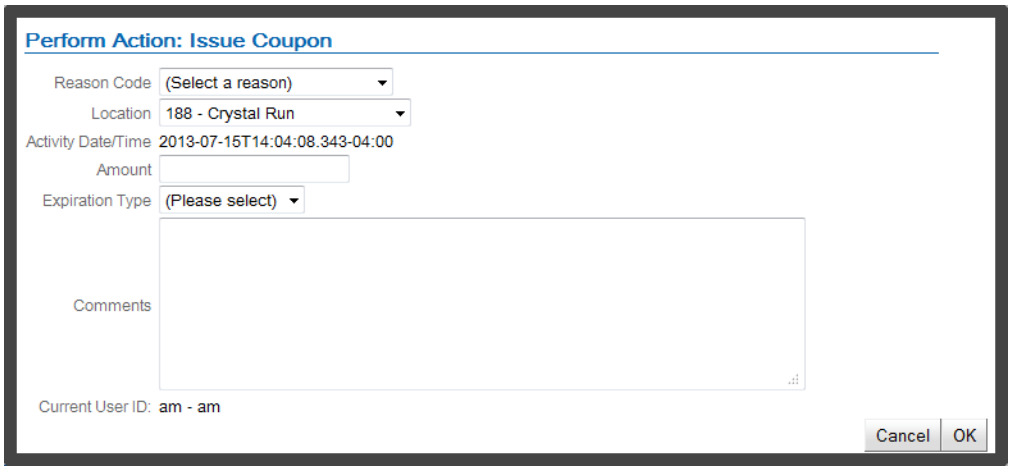


Figure 18-19: Issue Coupon Window

2. Enter the information for the Coupon:
   - **Reason Code** - Use the Selection Menu to select the reason for issuing the Coupon.
   - **Location** - Use the Selection Menu to select the location where the Coupon is being issued.

- **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
- **Amount** - The amount of the Coupon (uses the base currency for the Program).
- **Expiration Type** - Use the Selection Menu to select the type of expiration of the Coupon. This has the following options:
  - **Use Program** - Coupon expires when the Program expires.
  - **Specify** - Select a specific date on which the Coupon expires.
- **Expiration Date** - Use the Calendar Menu to select the date on which the Coupon will expire (only visible if the Expiration Date is **Specify**).
- **Comments** - Enter any comments describing the Coupon issue.

3. Click **OK** to issue the Coupon and close the Window, or click **Cancel** to close the Window without issuing a Coupon.

View Coupons

To view all of the Coupons issued to a Customer, select **VIEW COUPONS** in the Actions Menu to open a Coupons Window displaying a List of Coupons issued through the Account.

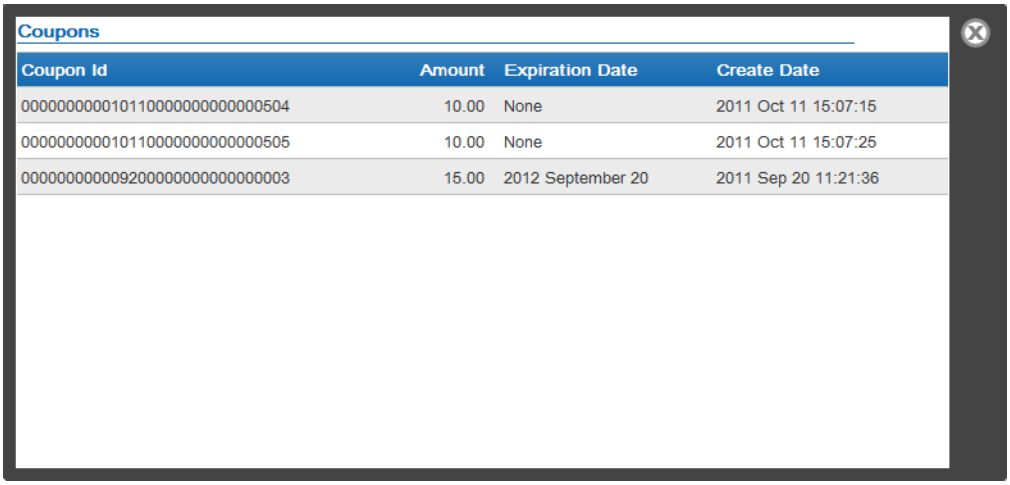


Figure 18-20: Coupons Window

The following information is displayed for each Coupon issued:

- **Coupon Id** - The ID number for the coupon.
- **Amount** - The amount of the coupon (in the base currency of the Program).
- **Expiration Date** - The expiration date of the Coupon.
- **Create Date** - Date the Coupon was created.

Activity Detail Window

Click an activity to view detailed information about an activity in the List of activities displayed for an Account. The activity will be displayed in the Activity Detail Window.

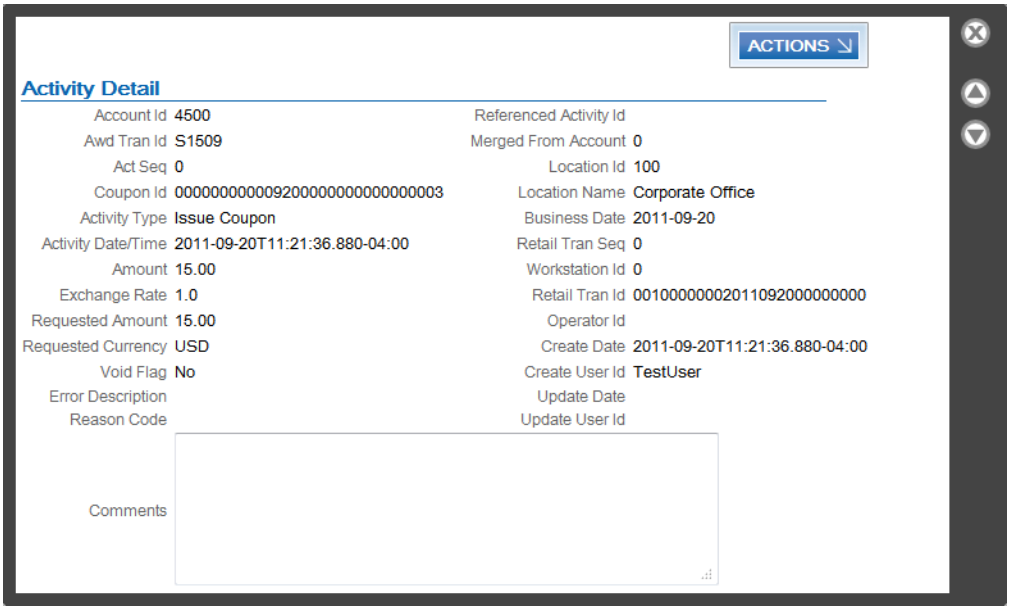


Figure 18-21: Activity Detail Window

The Activity Detail Window displays detailed information about an activity performed on an Account. The following information is displayed for each activity:

- **Account Id** - ID number for the Account associated with the activity.
- **Awd Tran Id** - Transaction ID of the activity on the Account.
- **Act Seq** - Sequence number of the activity within a transaction.
- **Coupon Id** - ID number for the coupon (if any) created or redeemed by the activity.
- **Activity Type** - Type of activity performed.
- **Activity Date/Time** - Date and time of the activity.
- **Amount** - Amount applied to the Account by the activity.
- **Exchange Rate** - If the transaction was performed in a foreign currency, the exchange rate between the foreign currency and the Account's base currency.
- **Requested Amount** - Requested currency amount.
- **Requested Currency** - Currency used for the requested amount, if different from the base currency.
- **Void Flag** - Indicates whether the activity was voided.
- **Error Description** - If an error occurred during the activity, a description of the error.
- **Reason Code** - Reason for the activity.
- **Referenced Activity Id** - ID of an activity to which this activity refers.
- **Merged From Account** - If the Account was moved from another Account by a Card Merge, the ID number of the Account previously associated with the activity.

- **Location Id** - ID of the Location where the activity was performed.
- **Location Name** - Name of the Location.
- **Franchisee** - Name of the Franchisee.
- **Business Date** - Business date of the activity.
- **Retail Tran Seq** - Sequence number of the activity within a retail transaction.
- **Workstation Id** - ID of the workstation (within the Location) where the activity was performed.
- **Retail Tran Id** - ID of the retail transaction where the activity was performed.
- **Operator Id** - ID of the employee who performed the transaction.
- **Create Date** - Date on which the activity was created.
- **Create User Id** - ID of the user who created the activity.
- **Update Date** - Date on which the activity was most recently updated.
- **Update User Id** - ID of the last user to update the activity.
- **Comments** - Additional comments entered about the activity.

Actions Menu

The Actions Menu in the Activity Detail Window for an Award Account has the following option:



- **VOID** - Voids the open activity (see "Void an Activity" on page 551).

Void an Activity

To void an activity on an Account:

1. Open the activity in the Activity Detail Window.
2. In the Activity Detail Window, select **VOID** in the Actions Menu.

   A Perform Action: Void Window opens.

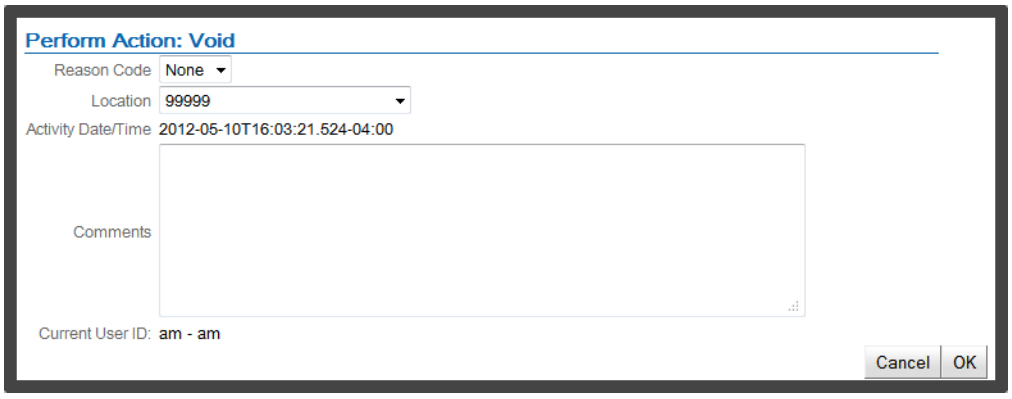


Figure 18-22: Perform Action: Void Window

3. Select the **Reason Code** for the Void in the Selection Menu.
4. Select the **Location** to be used for the Void in the Selection Menu.

5. Select the **Franchisee** in the Selection Menu.
6. Enter **Comments** describing the reasons for the Void.
7. Click the **OK** button to void the activity and close the Window, or click the **Cancel** button to close the Window without voiding the activity.

Loyalty Account

The following information is displayed for each Loyalty Account:

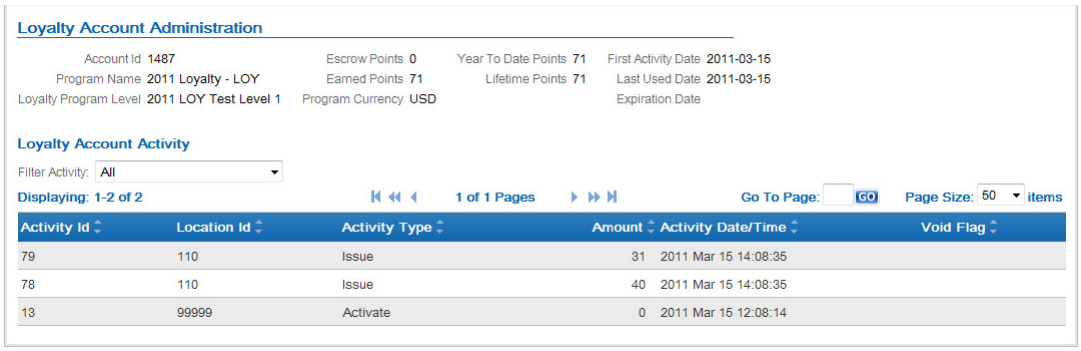
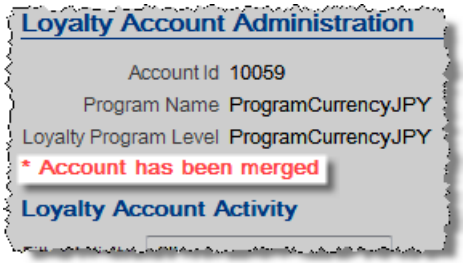


Figure 18-23: Loyalty Account Information

- **Loyalty Account Administration** - Displays information about the Loyalty Account. This area includes the following information:
  - **Account Id** - ID number for the Account.
  - **Program Name** - Name of the Program to which the Account belongs.
  - **Loyalty Program Level** - Name of the Loyalty Level to which the Account currently belongs.
  - **Escrow Points** - Number of points currently escrowed in the Account.
  - **Earned Points** - Current points balance of the Account.
  - **Program Currency** - ID of the currency used for the Loyalty Program.
  - **Year to Date Points** - Number of points earned by the Account in the current year to date.
  - **Lifetime Points** - Number of points earned by the Account during the lifetime of the Account.
  - **First Activity Date** - Date of the first activity on the Account.
  - **Last Used Date** - Date of the most recent activity on the Account.

- **Expiration Date** - Date on which the Account expires.

If the Loyalty Account was merged with another Account, Relate will display the message "Account has been merged" below the Loyalty Account Administration area.



- **Loyalty Account Activity** - A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Activity Menu.

  This List uses Page Navigation to organize the actions.

  The following information is displayed for each Account action:

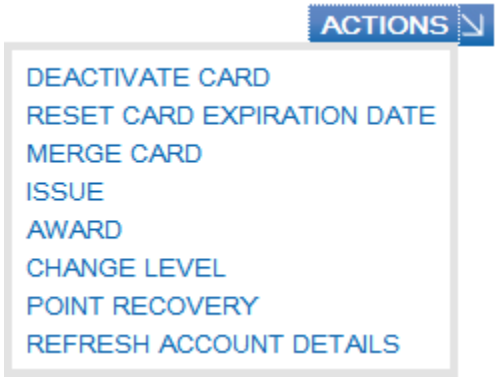
  - **Activity Id** - ID of the activity on the Account.
  - **Location Id** - ID of the location where the activity occurred.
  - **Activity Type** - Type of activity performed.
  - **Amount** - Number of Points applied to the Account by the activity.
  - **Activity Date/Time** - Date and time of the activity.
  - **Void Flag** - Indicates whether the activity was voided.

Filter Activity Menu

The Filter Activity menu is a Filter for the Loyalty Account Activity List. This Selection Menu filters the Loyalty Account Activity List by Activity Type.

Actions Menu

The Actions Menu for a Loyalty Account will display the following options:



- **ACTIVATE CARD** - Activate an inactive Card (only shown for inactive Cards). See "Activate Card" on page 534.
- **DEACTIVATE CARD** - Deactivate an active Card (only shown for active Cards). See "Deactivate Card" on page 535.
- **RESET CARD EXPIRATION DATE** - Set a new expiration date for the card. See "Set New Card Expiration Date" on page 536.
- **MERGE CARD** - Merge the Card with another Card. See "Merge Card" on page 537.
- **ISSUE** - Issue points to a Loyalty Account. See "Issue Points" on page 554.
- **AWARD** - Issue an award to a Customer. See "Issue an Award" on page 555.

- **CHANGE LEVEL** - Change the Loyalty Level of the Loyalty Account. See "Change Level" on page 556.
- **POINT RECOVERY** - Issue points that were not issued to a Customer in a previous transaction. See "Recover Points" on page 557.
- **REFRESH ACCOUNT DETAILS** - Refresh/Reload the information displayed for the Account.

Issue Points

To issue points to a Loyalty Account:

1. Click **ISSUE** in the Actions Menu for a Loyalty Account.

   A Perform Action: Issue Window opens.

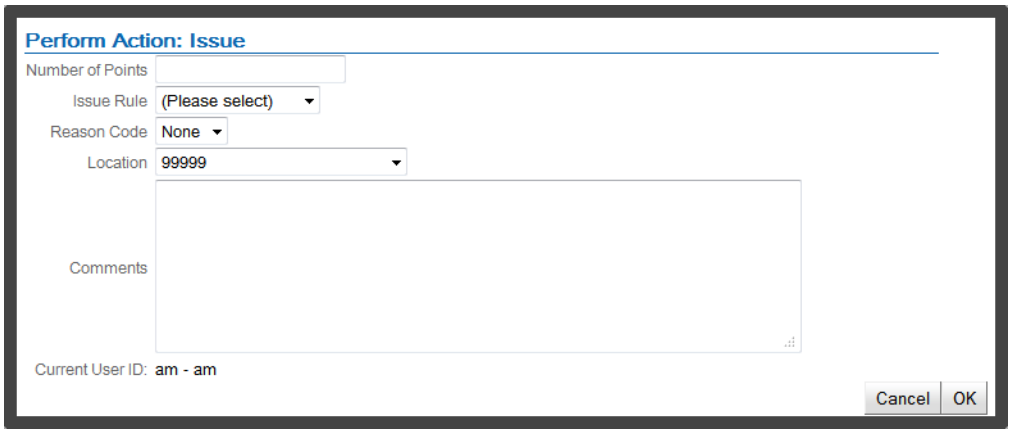


Figure 18-24: Perform Action: Issue Window

2. Enter the information for issuing points:
   - **Number of Points** - The number of points to issue.
   - **Issue Rule** - Use the Selection Menu to select the Loyalty Rule to use for issuing the points. The menu includes those rules that belong to the Loyalty Program.
   - **Reason Code** - Use the Selection Menu to select the reason for issuing the points.
   - **Location** - Use the Selection Menu to select the location where the points are being issued.
   - **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
   - **Comments** - Enter any comments describing the points issued.
3. Click **OK** to issue the points and close the Window, or click **Cancel** to close the Window without issuing points.

Issue an Award

To issue an Award to an Account:

1. Click **AWARD** in the Actions Menu for a Loyalty Account.

   A Perform Action: Award Window opens.

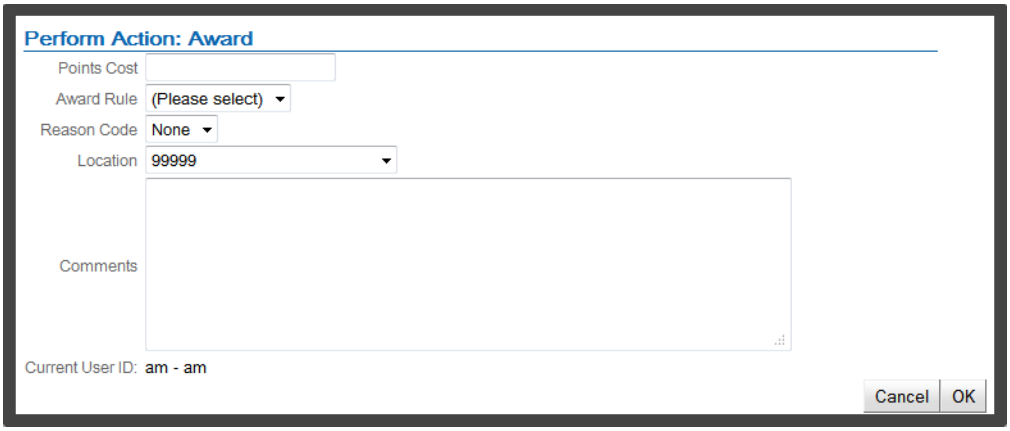


Figure 18-25: Perform Action: Award Window

2. Enter the information for issuing the E-Award:
   - ❑ **Points Cost** - The number of points to remove from the Loyalty Account as part of issuing the E-Award.
   - ❑ **Award Rule** - Use the Selection Menu to select the Award Rule to use for issuing the E-Award. The menu includes those Award Rules that belong to the Card Definition.
   - ❑ **Reason Code** - Use the Selection Menu to select the reason for awarding the points.
   - ❑ **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
   - ❑ **Location** - Use the Selection Menu to select the location where the Award is being issued.
   - ❑ **Comments** - Enter any comments describing the issuance of the Award.
3. Click **OK** to issue the Award and close the Window, or click **Cancel** to close the Window without issuing an Award.

Change Level

To change the Loyalty Level for a Customer:

1. Click **CHANGE LEVEL** in the Actions Menu for a Loyalty Account.

   A Perform Action: Change Level Window opens.

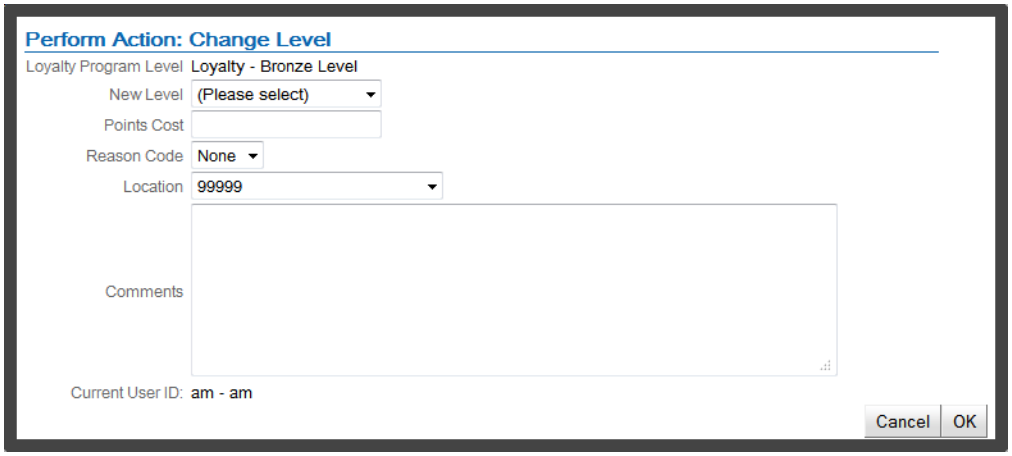


Figure 18-26: Perform Action: Change Level Window

2. Enter the information for changing the Loyalty Level:
   - **New Level** - Use the Selection Menu to select the new Loyalty Level for the Account. The menu includes the Levels in the Loyalty Program.
   - **Points Cost** - The number of points to remove from the Loyalty Account for changing the Loyalty Level.
   - **Reason Code** - Use the Selection Menu to select the reason for changing the level.
   - **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
   - **Location** - Use the Selection Menu to select the location where the Loyalty Level change is being performed.
   - **Comments** - Enter any comments describing the change in Loyalty Level.
3. Click **OK** to change the Loyalty Level and close the Window, or click **Cancel** to close the Window without change the Loyalty Level of the Account.

Recover Points

To issue loyalty points that were earned, but not issued to a Customer for a specific transaction:

1. Click **POINT RECOVERY** in the Actions Menu for a Loyalty Account.

   A Perform Action: Search for Retail Transaction Window opens.



Figure 18-27: Perform Action: Search for Retail Transaction Window

2. Enter the transaction search information:
   - ❑ **Location Id** - ID number for the location where the transaction was performed.
   - ❑ **Register Id** - ID number for the register where the transaction was performed.
   - ❑ **Business Date** - Use the Calendar Menu to select business date on which the transaction was performed.
   - ❑ **Seq. Number** - The sequence number of the transaction.
3. Click **OK** to search for the transaction and close the Window, or click **Cancel** to close the Window without searching for the transaction.

   If the transaction is found and the loyalty points have not been processed for that line item, a Perform Action: Point Recovery Window opens.

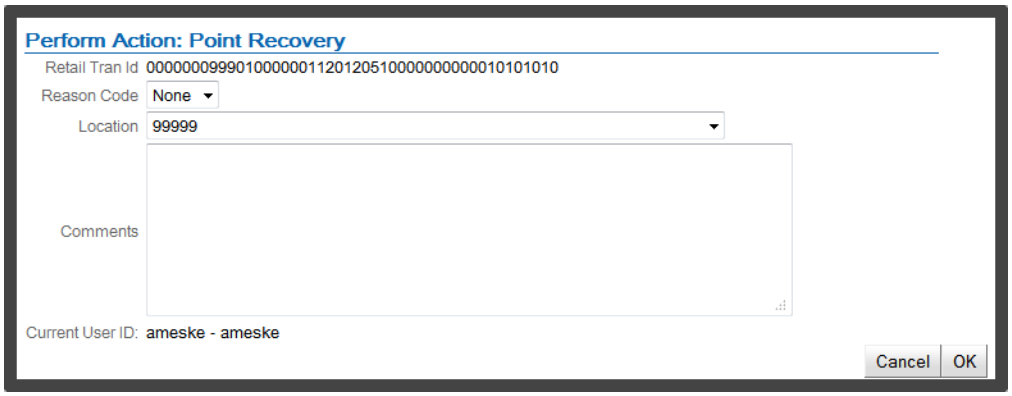


Figure 18-28: Perform Action: Point Recovery Window

   If the transaction is not found, or if the transaction was found, but the loyalty points have already been processed for the transaction, the window will close and an error message will be displayed.
4. Enter the Point Recovery information:
   - ❑ **Reason Code** - Use the Selection Menu to select the reason for performing the point recovery.

- **Franchisee** - Use the Selection Menu to select the Franchisee associated with the action.
- **Location** - Use the Selection Menu to select the Location where the points are being recovered.
- **Comments** - Enter any comments describing the point recovery.

5. Click **OK** to recover the points and close the Window, or click **Cancel** to close the Window without recovering the points.

Activity Detail Window

Click an activity to view detailed information about an activity in the List of activities displayed for an Account. The activity will be displayed in the Activity Detail Window.

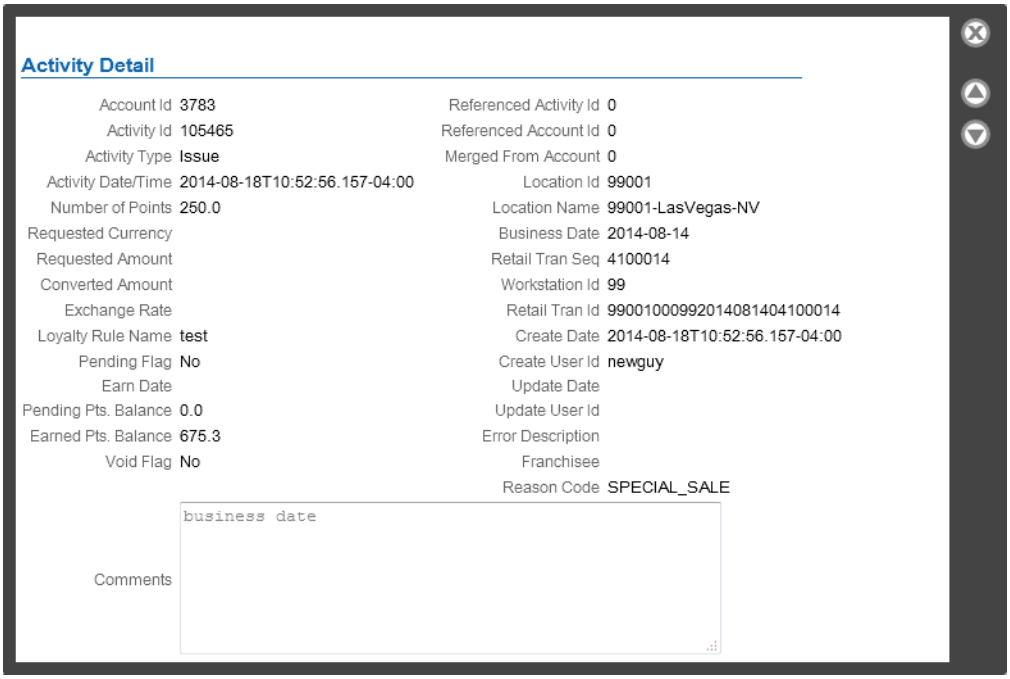


Figure 18-29: Activity Detail Window

The Activity Detail Window displays detailed information about an activity performed on an Account. The following information is displayed for each activity:

- **Account Id** - ID number for the Account associated with the activity.
- **Activity Id** - ID of the activity on the Account.
- **Activity Type** - Type of activity performed.
- **Activity Date/Time** - Date and time of the activity.
- **Number of Points** - Number of points applied to the points balance.
- **Requested Currency** - Type of currency requested.
- **Requested Amount** - Amount of the request.
- **Converted Amount** - Amount of the request in the system's base currency.

- **Exchange Rate** - Exchange rate between the requested currency and the system's base currency.
- **Loyalty Rule Name** - The name of the loyalty rule used by the activity.
- **Pending Flag** - Indicates whether the points are pending (**Yes**) or completed (**No**).
- **Earn Date** - Date a pending activity will complete.
- **Pending Pts. Balance** - Number of points pending at the time of the activity.
- **Earned Pts. Balance** - Earned points balance at the time of the activity.
- **Void Flag** - Indicates whether the activity was voided.
- **Referenced Activity Id** - ID of an activity to which this activity refers.
- **Referenced Account Id** - ID of the Loyalty Account used by the Referenced Activity.
- **Merged From Account** - If the Account was moved from another Account by a Card Merge, the ID number of the Account previously associated with the activity.
- **Location Id** - ID of the Location where the activity was performed.
- **Location Name** - Name of the Location.
- **Business Date** - Business date of the activity.
- **Retail Tran Seq** - Sequence number of the activity on the retail transaction.
- **Workstation Id** - ID of the workstation (within the Location) where the activity was performed.
- **Retail Tran Id** - ID of the retail transaction where the activity was performed.
- **Create Date** - Date on which the activity was created.
- **Create User Id** - ID of the user who created the activity.
- **Update Date** - Date on which the activity was most recently updated.
- **Update User Id** - ID of the last user to update the activity.
- **Error Description** - If an error occurred during the activity, a description of the error.
- **Franchisee** - Name of the Franchisee.
- **Reason Code** - Reason for the activity.
- **Comments** - Additional comments entered about the activity.

Entitlement Account

The following information is displayed for each Entitlement Account:

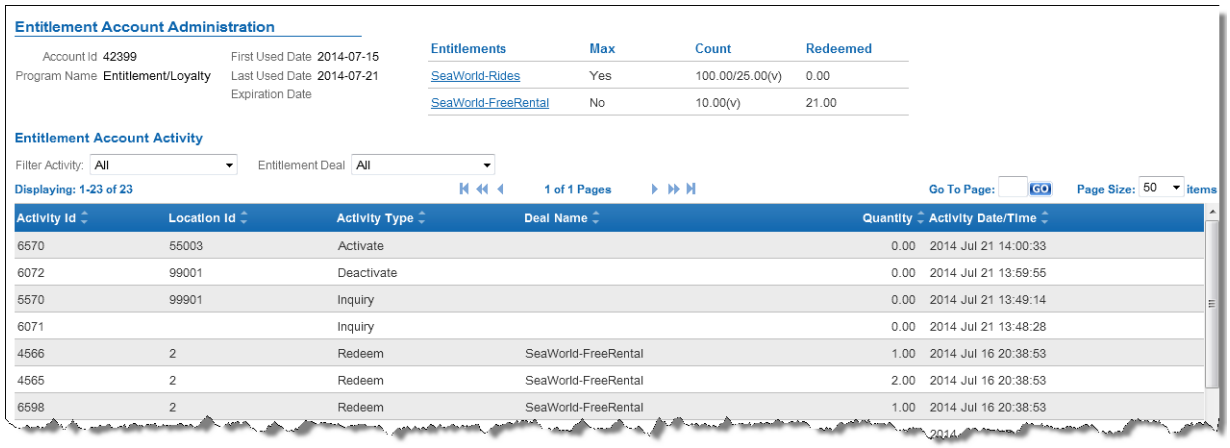
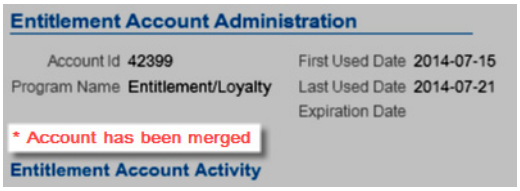


Figure 18-30: Entitlement Account

- **Entitlement Account Administration** - Displays information about the Entitlement Account. This area includes the following information:
  - **Account Id** - ID number for the Account.
  - **Program Name** - Name of the Program to which the Account belongs.
  - **First Used Date** - Date of the first activity on the Account.
  - **Last Used Date** - Date of the most recent activity on the Account.
  - **Expiration Date** - Date on which the Account expires.



If the Entitlement Account was merged with another Account, Relate will display the message "Account has been merged" below the Entitlement Account Administration area.



  - A list of Entitlements available through the Entitlement Account.
    - **Entitlements** - Name of the Entitlement.
    - **Max** - Indicates whether there is a maximum number of times the Entitlement can be applied.
    - **Count** - A slash-separated (/) list of maximums, if any, assigned to the Account.

      If **Max** is set to yes, Count will display the maximum number of times the Entitlement can be redeemed.

      If there is a velocity maximum for the Entitlement, Count will display the maximum set for the velocity, followed by a 'v' in parentheses. For example, if the Entitlement can be applied a maximum of 2 times in one hour, `2.00(v)` will appear in the Count field.

- **Redeemed** - The number of times the Entitlement has been redeemed.

- **Entitlement Account Activity** - A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Menus.

  This List uses Page Navigation to organize the actions.

  The following information is displayed for each Account action:

  - **Activity Id** - ID of the activity on the Account.
  - **Location Id** - ID of the location where the activity occurred.
  - **Activity Type** - Type of activity performed.
  - **Deal Name** - Name of the Deal applied by the activity.
  - **Quantity** - Number of times the Deal was applied by the activity.
  - **Activity Date/Time** - Date and time of the activity.
  - **Void Flag** - Indicates whether the activity was voided.

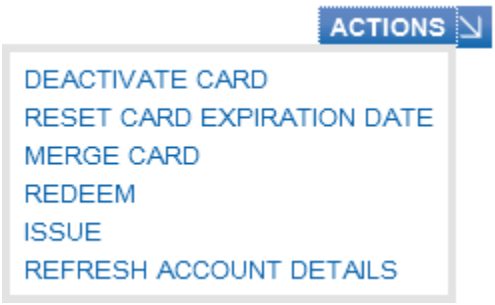
Filter Menus

The Entitlement Account Activity List has the following Filter menus:

- **Filter Activity** - This Selection Menu filters the Entitlement Account Activity List by Activity Type.
- **Entitlement Deal** - This Selection Menu filters the Entitlement Account Activity List by the Entitlement Deal associated with the activity.

Actions Menu

The Actions Menu for Entitlement Accounts will display the following options:



- **ACTIVATE CARD** - Activate an inactive Card (only shown for inactive Cards). See "Activate Card" on page 534.
- **DEACTIVATE CARD** - Deactivate an active Card (only shown for active Cards). See "Deactivate Card" on page 535.
- **RESET CARD EXPIRATION DATE** - Set a new expiration date for the card. See "Set New Card Expiration Date" on page 536.
- **MERGE CARD** - Merge the Card with another Card. See "Merge Card" on page 537.
- **REDEEM** - Redeem an Entitlement Deal. See "Redeem an Entitlement" on page 562.
- **ISSUE** - Issue an Entitlement to a Customer. See "Issue an Entitlement" on page 563.
- **REFRESH ACCOUNT DETAILS** - Refresh/Reload the information displayed for the Account.

Redeem an Entitlement

To redeem an entitlement:

1. Click **REDEEM** in the Actions Menu for an Entitlement Account.

   A Perform Action: Redeem Window opens.

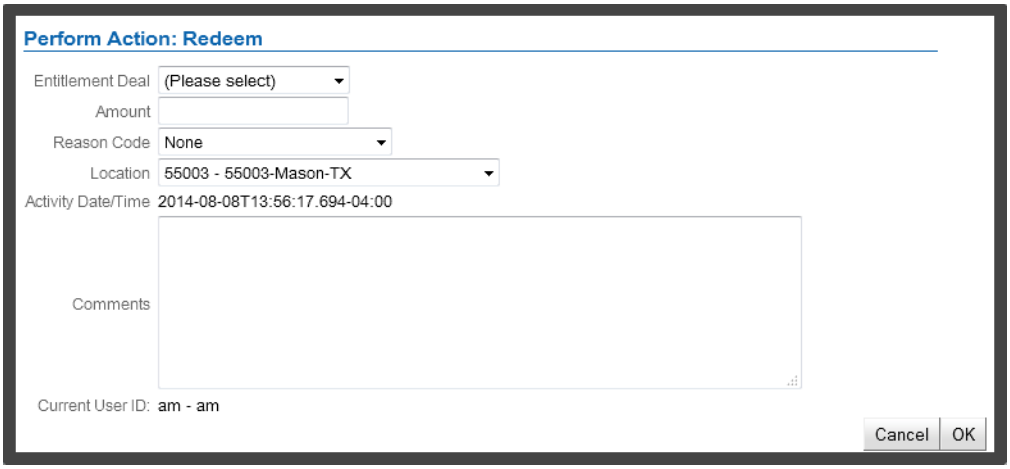


Figure 18-31: Perform Action: Redeem Window

2. Enter the configurations for the Entitlement redemption:
   - ❑ **Entitlement Deal** - Selection Menu that determines the Entitlement Deal being redeemed.
   - ❑ **Amount** - Amount of the redemption.
   - ❑ **Reason Code** - Selection Menu indicating the reason for the redemption.
   - ❑ **Location** - Selection Menu indicating the Location where the redemption occurs.
   - ❑ **Comments** - Additional comments on the redemption.
3. When finished, click the **OK** button.

   The Entitlement is redeemed and the Perform Action: Redeem Window closes.

Issue an Entitlement

1. Click **ISSUE** in the Actions Menu for an Entitlement Account.

   A Perform Action: Issue Window opens.

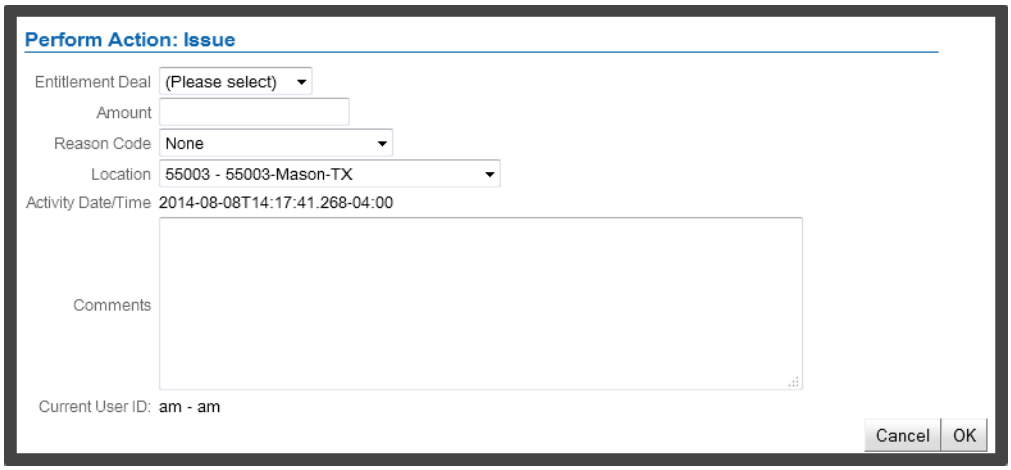


Figure 18-32: Perform Action: Issue Window

2. Enter the configurations for issuing the Entitlement:
   - ❑ **Entitlement Deal** - Selection Menu that determines the Entitlement Deal being issued.
   - ❑ **Amount** - Amount of the issuance.
   - ❑ **Reason Code** - Selection Menu indicating the reason for the issuance.
   - ❑ **Location** - Selection Menu indicating the Location where the Deal is being issued.
   - ❑ **Comments** - Additional comments on the issuance.
3. When finished, click the **OK** button.

   The Entitlement is issued and the Perform Action: Issue Window closes.

Entitlement Deal Window

Click an Entitlement Deal in the Entitlement Account Administration to view detailed information about that Entitlement Deal in an Entitlement Deal Window.

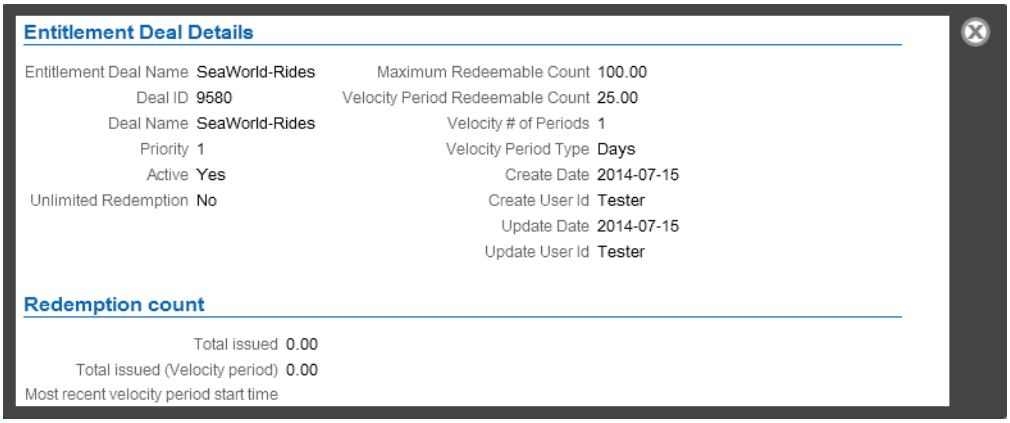


Figure 18-33: Entitlement Deal Window

The Entitlement Deal Window displays the following information for an Entitlement:

- **Entitlement Deal Details** - This area displays configuration information about the Deal used by the Entitlement.
  - **Entitlement Deal Name** - Name of the Entitlement Deal.
  - **Deal ID** - ID of the Deal used by the Entitlement.
  - **Deal Name** - Name of the Deal used by the Entitlement.
  - **Priority** - Order in which the Deal is applied to a transaction.
  - **Active** - Indicates whether the Entitlement is active.
  - **Unlimited Redemption** - Indicates whether there is a limit on the number of times the Entitlement can be redeemed.
  - **Maximum Redeemable Count** - Maximum number of times the Entitlement can be redeemed by the Customer. *This configuration is only used if **Unlimited Redemption** is set to Yes.*
  - **Velocity Period Redeemable Count** - Maximum number of times, if any, that the Entitlement can be redeemed during a specified period of time.
  - **Velocity # of Periods** - Number of time periods (see Velocity Period Type) in the velocity limitation.
  - **Velocity Period Type** - Type of time period used to determine the velocity limit.
  - **Create Date** - Date the Entitlement was created.
  - **Create User Id** - ID of the User who created the Entitlement.
  - **Update Date** - Date the Entitlement was last updated.
  - **Update User Id** - ID of the User who last updated the Entitlement.

- **Redemption Count** - Redemption information for the Deal.
  - **Total issued** - Number of times the Entitlement has been redeemed by the Customer.
  - **Total issued (Velocity period)** - Number of times the Entitlement has been redeemed by the Customer during the current velocity time period.
  - **Most recent velocity period start time** - Time the most recent velocity time period began.

Activity Detail Window

Click an activity to view detailed information about an activity in the List of activities displayed for an Account. The activity will be displayed in the Activity Detail Window.

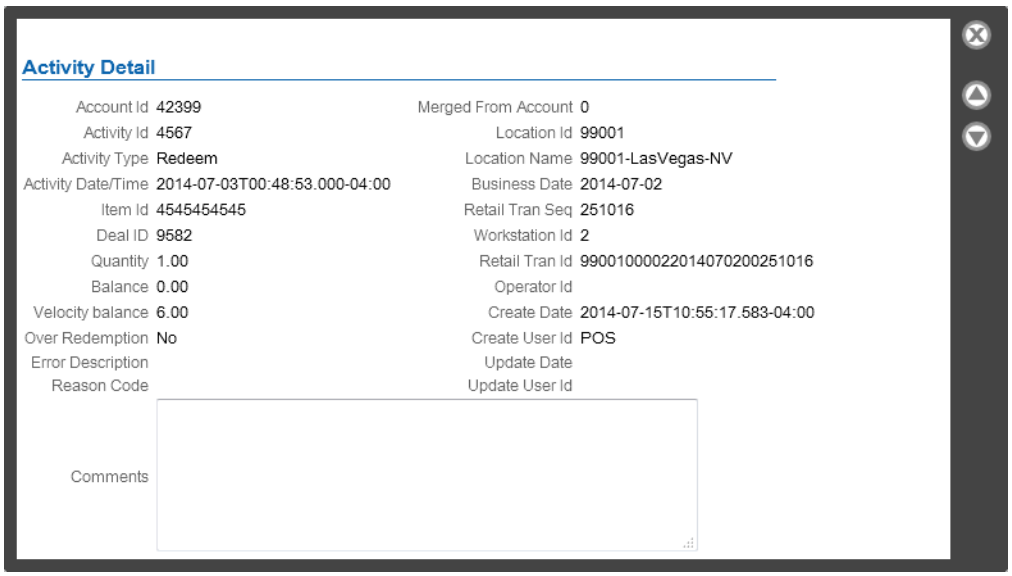


Figure 18-34: Activity Detail Window

The Activity Detail Window displays detailed information about an activity performed on an Account. The following information is displayed for each activity:

- **Account Id** - ID number for the Account associated with the activity.
- **Activity Id** - ID of the activity on the Account.
- **Activity Type** - Type of activity performed.
- **Activity Date/Time** - Date and time of the activity.
- **Item Id** - ID of the item on which the activity was performed.
- **Deal ID** - ID of the Deal used by the activity.
- **Quantity** - Number of items on which the activity was performed.
- **Balance** - Current Entitlement balance for the Account.
- **Velocity Balance** - Current Entitlement velocity balance for the Account.
- **Over Redemption** - Indicates whether the Account is over its redemption limit.

- **Error Description** - If an error occurred during the activity, a description of the error.
- **Reason Code** - Reason for the activity.
- **Merged From Account** - If the Account was moved from another Account by a Card Merge, the ID number of the Account previously associated with the activity.
- **Location Id** - ID of the Location where the activity was performed.
- **Location Name** - Name of the Location.
- **Business Date** - Business date of the activity.
- **Retail Tran Seq** - Sequence number of the activity within a retail transaction.
- **Workstation Id** - ID of the workstation (within the Location) where the activity was performed.
- **Retail Tran Id** - ID of the retail transaction of the activity. This field provides a Link to the Transaction in the Customer's Transaction History.
- **Operator Id** - ID of the User who performed the activity.
- **Create Date** - Date on which the activity was created.
- **Create User Id** - ID of the user who created the activity.
- **Update Date** - Date on which the activity was most recently updated.
- **Update User Id** - ID of the last user to update the activity.
- **Comments** - Additional comments entered about the activity.

CHAPTER 19

Location Management

Overview

In Relate, Locations contain information about the locations in the company and chain. These Locations include information about the physical address of the location. Custom attributes can also be created and defined for Locations.

About this Chapter

This chapter contains the following information:

- "Location Search" on page 568 - Provides the procedure for searching for a Location.
- "Location List" on page 569 - Describes the Location List page and the functionality available within it.
- "Location Window" on page 570 - Describes the Location Window and its functionality.
- "Location Dashboard" on page 572 - Describes the Location Dashboard and its functions.
- "Edit Location Data" on page 574 - Describes the methods for editing information about a Location.
- "Edit Location Attributes" on page 575 - Describes the methods for creating, updating, and deleting Attributes assigned to a Location.
- "Create a Location" on page 577 - Provides the procedure for creation a Location in Relate.

Location Search

The Location Search page is used to search for Locations and Location information stored in Relate. Through the Location Search page, users can find a Location record and make changes to that record.

Use the **Admin->Location** menu option, or click the **Location Definition** Link on the Main Page to open the Location Search page.

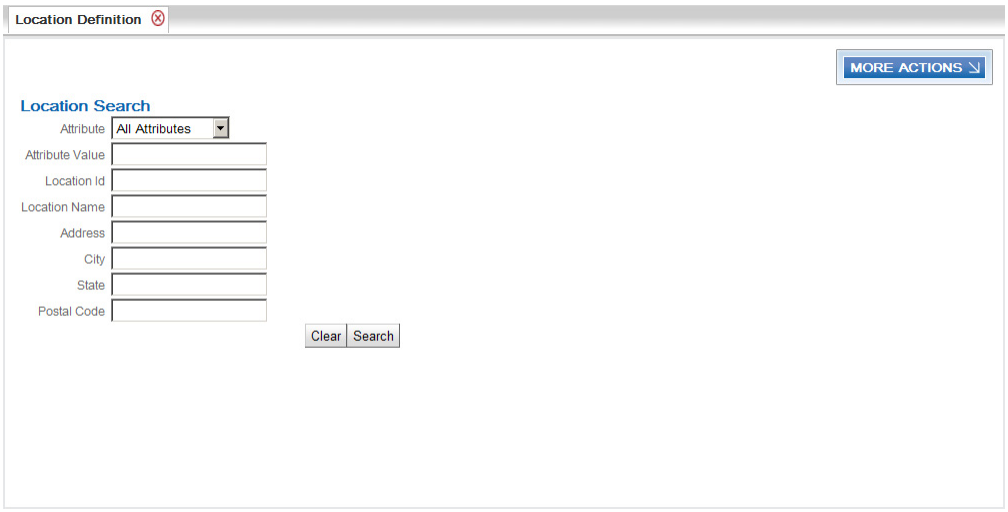


Figure 19-1: Location Search Page

Location Lookup

To look up a Location in Relate:

1. Open the Location Search page.
   - ❑ Use the **Admin->Location** menu option from anywhere in Relate.
   - ❑ Click the **Search** button in the Location List.
2. Enter the search information for the Location.



Be as specific as possible when entering search information. The more specific the information, the fewer Location records will be returned.

The Location Search page uses the following Data Elements for search entry:

- ❑ **Attribute** - If a value is selected in this Selection Menu, Relate will search for Locations that have this Attribute set.
- ❑ **Attribute Value** - Data within an Attribute value.
  - ❍ If a specific Attribute is selected in the Attribute Selection Menu, Relate will only search for the data in the specified Attribute's values.
  - ❍ If **All Attributes** is selected in the Attribute Selection Menu, Relate will search for the value in all the Attributes.

- **Location Id** - ID number for the Location.
- **Location Name** - Name of the Location.
- **Address** - Address line for the Location.
- **City** - City of the Location.
- **State** - State or Province of the Location.
- **Postal Code** - Postal Code or ZIP Code for the Location.

3. Click **Search** to perform the search.

   Relate opens the Location List with a List of all the Location records that match the entered search criteria.

Location List

The Location List is accessed through a Location Lookup.

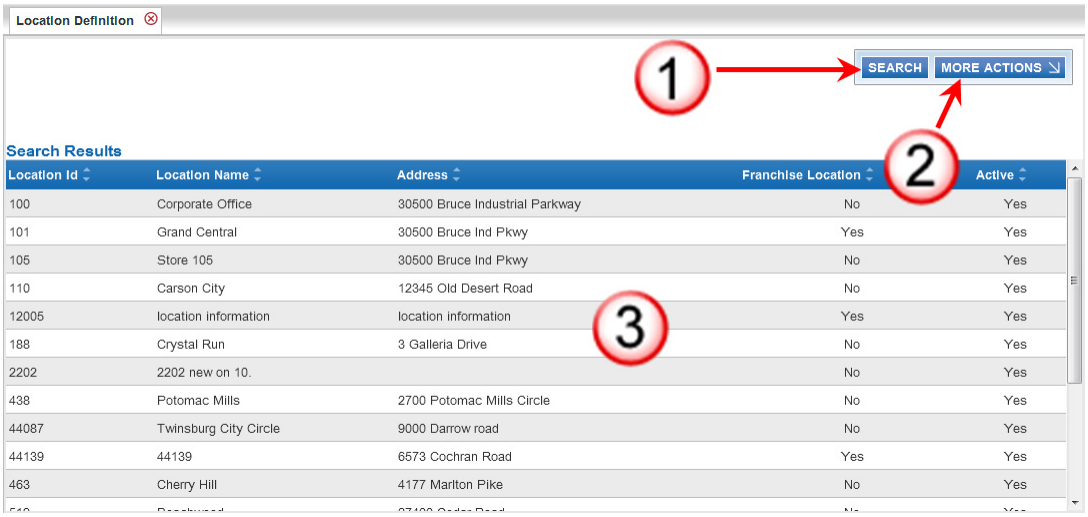


Figure 19-2: Location List

Table 19-1: *Location List Page Key*

Item	Description
1	**Search Button** - Click to return to the Location Search page. See "Location Search" on page 568 for more information.
2	**More Actions Menu** - Click to open a menu of actions that can be performed in the Location List page. See "More Actions Menu" on page 570 for more information.
3	**Location List** - A List of Locations currently in the system. The List displays a limited number of Locations; use the Filter Menus to narrow down the List and locate a certain Location.

The Location List displays the following information for each Location:

- **Location Id** - Unique ID for the Location.
- **Location Name** - Name of the Location.
- **Address** - Address Line 1 for the Location.
- **Franchise Location** - Indicates whether the Location is a Franchisee.
- **Active** - Indicates whether the Location is currently active.

More Actions Menu

The More Actions Menu is the Actions Menu for the Location List. This menu has the following options:



- **ADD LOCATION** - Create a new Location in Relate. See "Create a Location" on page 577.

Open a Location

To open a Location for viewing or updating, click the Location in the Location List. The Location will be displayed in a Location Window.

Location Window

The Location Window displays information about the selected Location and provides access to actions that can be performed on the Location.

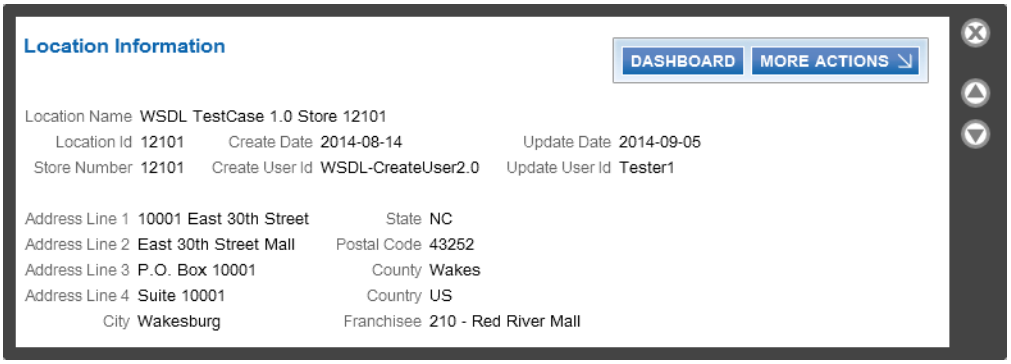


Figure 19-3: Location Window

The Location Window displays the following information for the Location:

- **DASHBOARD Button** - Opens the Location in the Location Dashboard.
- **Location Basic Information** - Basic information about the Location. This includes the following information:
  - **Location Name** - Name of the Location.
  - **Location ID** - Unique ID of the Location.
  - **Location Number** - Location Number of the Location.
  - **Create Date** - Date on which the Location was entered into the system.

- **Create User ID** - ID for the User who created the Location in the system.
- **Update Date** - Most recent date on which the Location information was changed.
- **Update User ID** - ID for the User who performed the most recent changes to the Location information.

- **Address** - Address information about the Location. This includes the following information:
  - **Address Line 1** - Line 1 of the Location's address.
  - **Address Line 2** - Line 2 of the Location's address.
  - **Address Line 3** - Line 3 of the Location's address.
  - **Address Line 4** - Line 4 of the Location's address.
  - **City** - City of the Location.
  - **State** - State or Province of the Location.
  - **Postal Code** - Postal Code or ZIP Code of the Location.
  - **County** - County of the Location.
  - **Country** - Country of the Location.
  - **Franchisee** - Name of the Franchisee to which the Location is assigned.

Open Location Dashboard

To open a Location in the Location Dashboard, do one of the following:

- In the Location Window, click the **Dashboard** button.
- Click **Dashboard** in the Location Actions Menu in the Location Basic Information area.

More Actions Menu

The More Actions Menu is the Actions Menu for the Location Window. This menu has the following options:



- **LOCATION** - Open the Location in the Edit Location Data screen. See "Edit Location Data" on page 574.

Location Dashboard

The Location Dashboard allows a user to view all information about a Location.

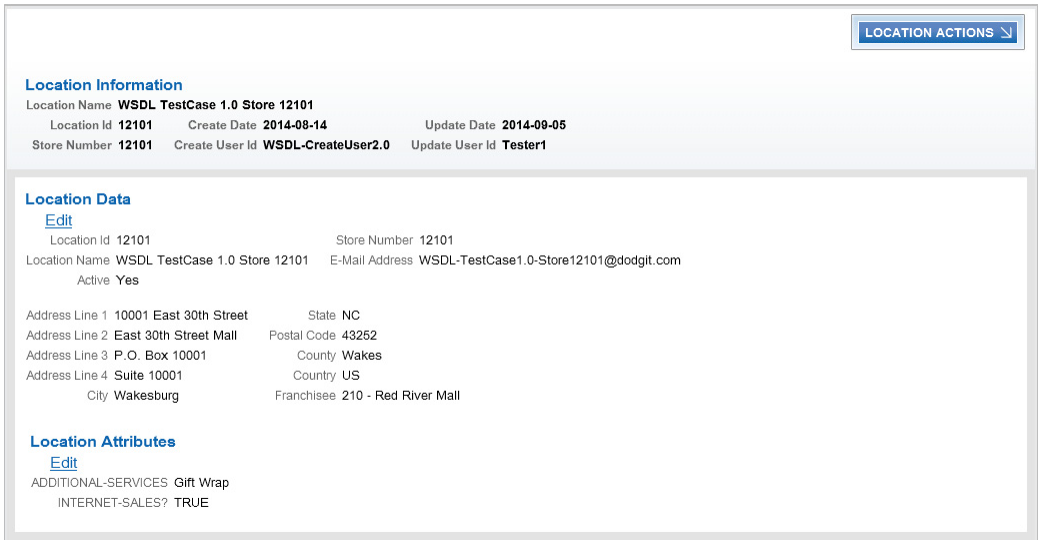


Figure 19-4: Location Dashboard

The Location Dashboard displays the following information:

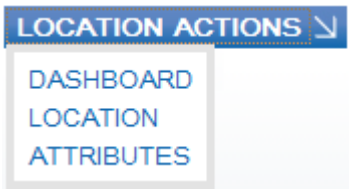
- **Location Basic Information** - Basic information about the Location that is also displayed in all areas of Location editing. This includes the following information:
  - **Location Address** - Address of the Location.
  - **Location Name** - Name of the Location.
  - **Location ID** - Unique ID of the Location.
  - **Location Number** - Location Number of the Location.
  - **Create Date** - Date on which the Location was entered into the system.
  - **Create User ID** - ID for the User who created the Location in the system.
  - **Update Date** - Most recent date on which the Location information was changed.
  - **Update User ID** - ID for the User who performed the most recent changes to the Location information.
- **Location Data** - Contains the same information as the Location Basic Information section.
  - **Location ID** - Unique ID of the Location.
  - **Location Name** - Name of the Location.
  - **Active** - Indicates whether the Location is currently active.
  - **Location Number** - Location Number of the Location.
  - **E-Mail Address** - E-Mail address for the Location.
  - **Address Line 1** - Line 1 of the Location's address.

- **Address Line 2** - Line 2 of the Location's address.
- **Address Line 3** - Line 3 of the Location's address.
- **Address Line 4** - Line 4 of the Location's address.
- **City** - City of the Location.
- **State** - State or Province of the Location.
- **Postal Code** - Postal Code or ZIP Code of the Location.
- **County** - County of the Location.
- **Country** - Country of the Location.
- **Franchisee** - Name of the Franchisee to which the Location is assigned.

- **Location Attributes** - If Attributes are configured for the Location, the following information is displayed for each assigned Attribute:
  - Type of Attribute.
  - Value for the Attribute.

Location Actions Menu

The Location Actions Menu is the Actions Menu for the Location Dashboard. This menu has the following options:



- **DASHBOARD** - Return to the Location Dashboard for the Location.
- **LOCATION** - Edit Location information. See "Edit Location Data" on page 574 for more information.
- **ATTRIBUTES** - Edit Attribute information for the Location. See "Edit Location Attributes" on page 575 for more information.

Edit Location Data

To edit the information in the Basic Information, Location Data, and/or Address sections for the Location:

1. Open the Edit Location Data screen by doing one of the following:
   - ❑ Click the **Edit** Link in the Location Data area of the Location Dashboard or the Edit Location Attributes screen.
   - ❑ Click **LOCATION** in the More Actions Menu in the Location Window.
   - ❑ Click **LOCATION** in the Location Actions Menu in the Location Dashboard.

   The Edit Location Data screen opens.

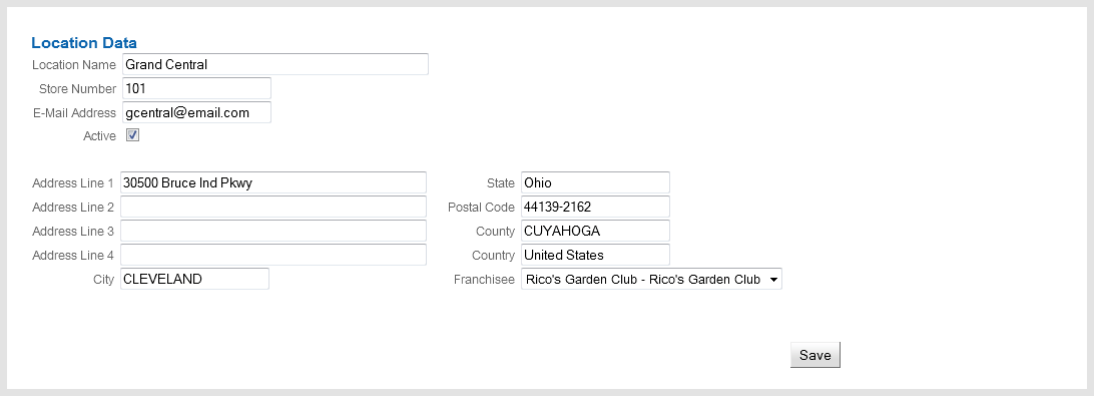


Figure 19-5: Edit Location Data Screen

2. Make any necessary changes to the fields.

   This screen includes the following editable fields:
   - ❑ **Location Name** - Name of the Location.
   - ❑ **Location Number** - Location Number of the Location.
   - ❑ **E-Mail Address** - E-Mail address for the Location.
   - ❑ **Active** - This Check Box determines whether the Location is currently active.
   - ❑ **Address Line 1** - Line 1 of the Location's address.
   - ❑ **Address Line 2** - Line 2 of the Location's address.
   - ❑ **Address Line 3** - Line 3 of the Location's address.
   - ❑ **Address Line 4** - Line 4 of the Location's address.
   - ❑ **City** - City of the Location.
   - ❑ **State** - State or Province of the Location.
   - ❑ **Postal Code** - Postal Code or ZIP Code of the Location.
   - ❑ **County** - County of the Location.
   - ❑ **Country** - Country of the Location.

- ❑ **Franchisee** - This Selection Menu determines the Franchisee to which the Location is assigned. Select **None** for a Location that will not be assigned to any Franchisee.

3. Click the **Save** button.

   The changes are saved and Relate returns to the Location Dashboard.

Edit Location Attributes

To edit the Attributes assigned to the Location:

1. Open the Edit Location Attributes screen by doing one of the following:
   - ❑ Click the **Edit** Link in the Location Attribute section of the Location Dashboard.
   - ❑ Click **ATTRIBUTES** in the Location Actions Menu of the Location Dashboard or the Edit Location Data screen.

   The Edit Location Attributes screen opens.

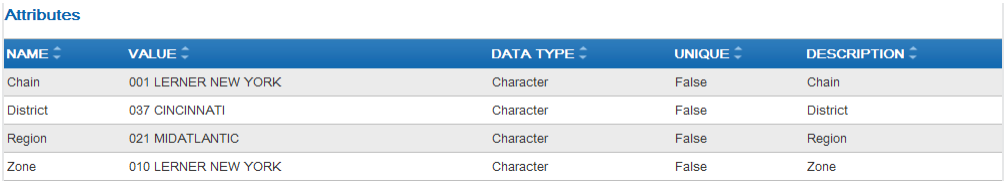


Figure 19-6: Edit Location Attributes Screen

2. Perform the necessary procedure(s):
   - ❑ "Update an Attribute" on page 575
   - ❑ "Add an Attribute" on page 576
   - ❑ "Delete an Attribute" on page 577

Update an Attribute

1. Click the Attribute to update.

   The Attribute opens in an Attribute Detail Window.

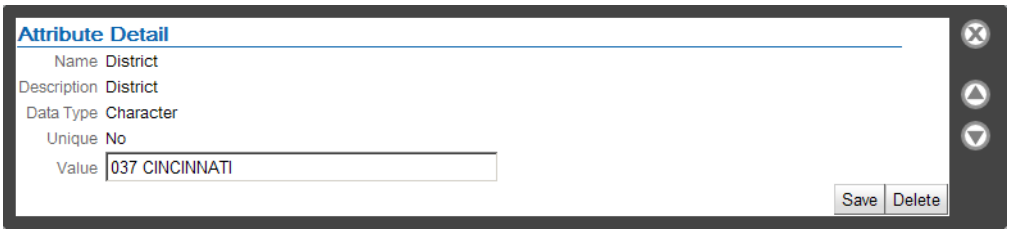


Figure 19-7: Attribute Detail Window

2. Change the value of the Attribute.
   - ❑ If the Attribute Data Type is **Character**, **Number**, or **Currency**, enter the new value in the Text Field.
   - ❑ If the Attribute Data Type is **Date**, select the new value in the Calendar Menu.

- ❑ If the Attribute Data Type is **List** or **Logical**, select the new value in the Selection Menu.

3. Click the **Save** button to save the Attribute with the new value and return to Edit Location Attributes.

Add an Attribute

1. Click the **ADD ATTRIBUTE** button.

   A blank Attribute Detail Window opens.

2. Use the Attribute Type Selection Menu to select the Attribute to add.

   The Attribute Type data populates the Attribute Detail Window fields.

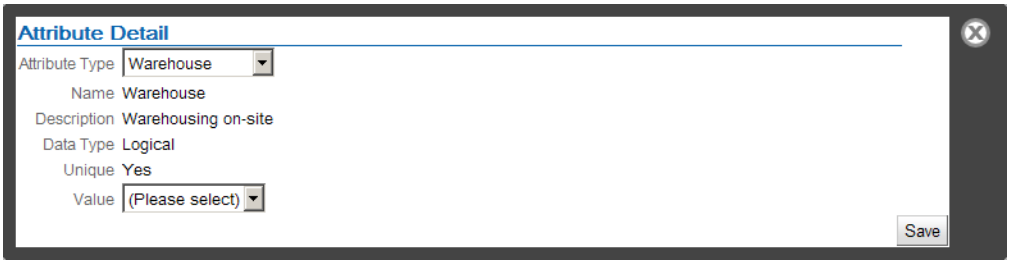


Figure 19-8: Attribute Type Selected

3. Select the value of the Attribute:
   - ❑ If the Attribute Data Type is **Character**, **Number**, or **Currency**, enter the new value in the Text Field.
   - ❑ If the Attribute Data Type is **Date**, select the new value in the Calendar Menu.
   - ❑ If the Attribute Data Type is **List** or **Logical**, select the new value in the Selection Menu.
4. Click the **Save** button to add the new Attribute to the Location and return to Edit Location Attributes.

Delete an Attribute

1. Click the Attribute to delete.

   The Attribute opens in an Attribute Detail Window.

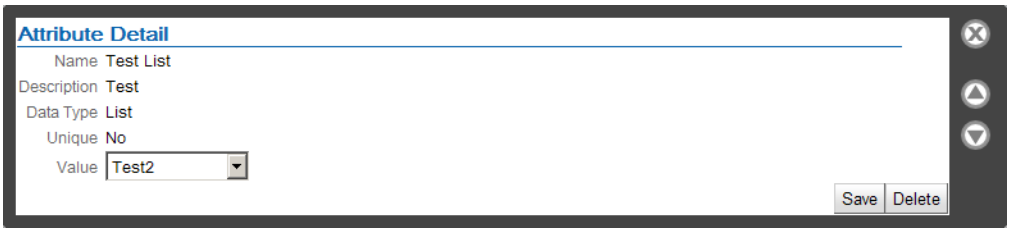


Figure 19-9: Attribute Detail Window

2. Click the **Delete** button to delete the Attribute from the Location and return to Edit Location Attributes.

Create a Location

To create a Location in Relate:

1. Perform a Location Lookup.

   A List of Locations is displayed.

2. Click **Add Location** in the More Actions Menu.

   The Create Location page opens.

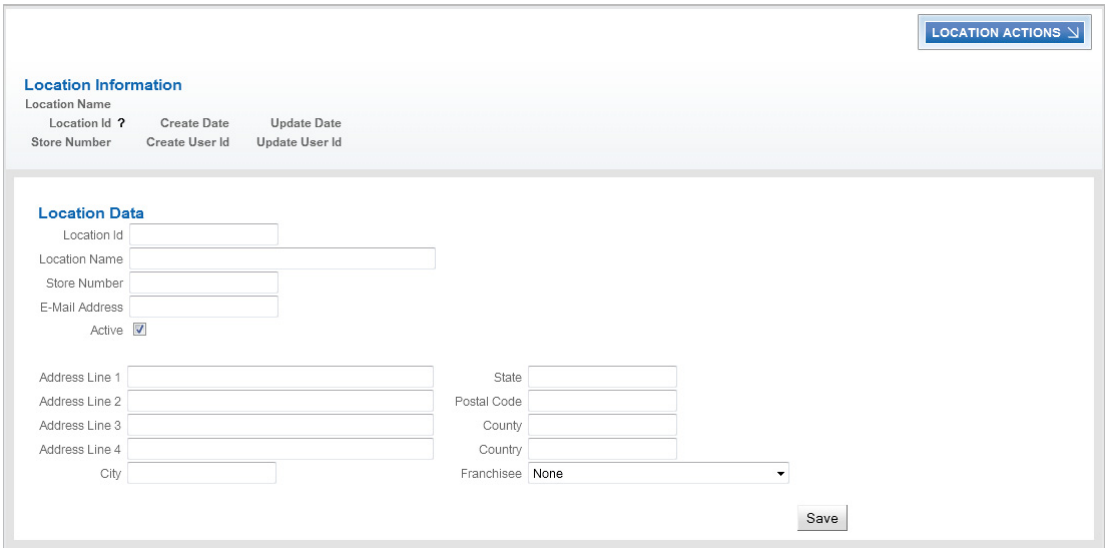


Figure 19-10: Create Location Page

3. Make any necessary entries in the fields.

   This screen includes the following editable fields:

   - **Location Id** - Unique ID for the Location.

- **Location Name** - Name of the Location.
- **Location Number** - Location Number of the Location.
- **E-Mail Address** - E-Mail address for the Location.
- **Active** - This Check Box determines whether the Location is currently active.
- **Address Line 1** - Line 1 of the Location's address.
- **Address Line 2** - Line 2 of the Location's address.
- **Address Line 3** - Line 3 of the Location's address.
- **Address Line 4** - Line 4 of the Location's address.
- **City** - City of the Location.
- **State** - State or Province of the Location.
- **Postal Code** - Postal Code or ZIP Code of the Location.
- **County** - County of the Location.
- **Country** - Country of the Location.
- **Franchisee** - This Selection Menu determines the Franchisee to which the Location is assigned. Select **None** **[DEFAULT]** for a Location that will not be assigned to any Franchisee.

4. Click the **Save** button.

   The changes are saved and Relate opens the Location Dashboard for the new Location.

5. If necessary, define the Attributes for the Location. See "Edit Location Attributes" on page 575 for a description of the procedure.

CHAPTER 20

Attributes

Overview

The chapter describes the methods and procedures for creating and managing Attributes in Relate.

Attributes provide additional, descriptive information about a Relate element. This information can be used to further define and/or group individual elements within Relate, beyond what Relate stores in its base configuration. For example, an Attribute for a Customer could be used to describe the person's job title, school, or their favorite team.

Attributes can be defined for Customers, Items, Locations, Promotions, Gift Registries, Segments, Deals, PromoDeals, or Cards. Each Attribute can only be assigned to one of these elements; you cannot assign an element to, for example, both an Item and a Location.



The "Relate_AttributeDefinition" role is required to access this area of Relate and perform the functions available in it. See the Relate Configuration Guide for more information.

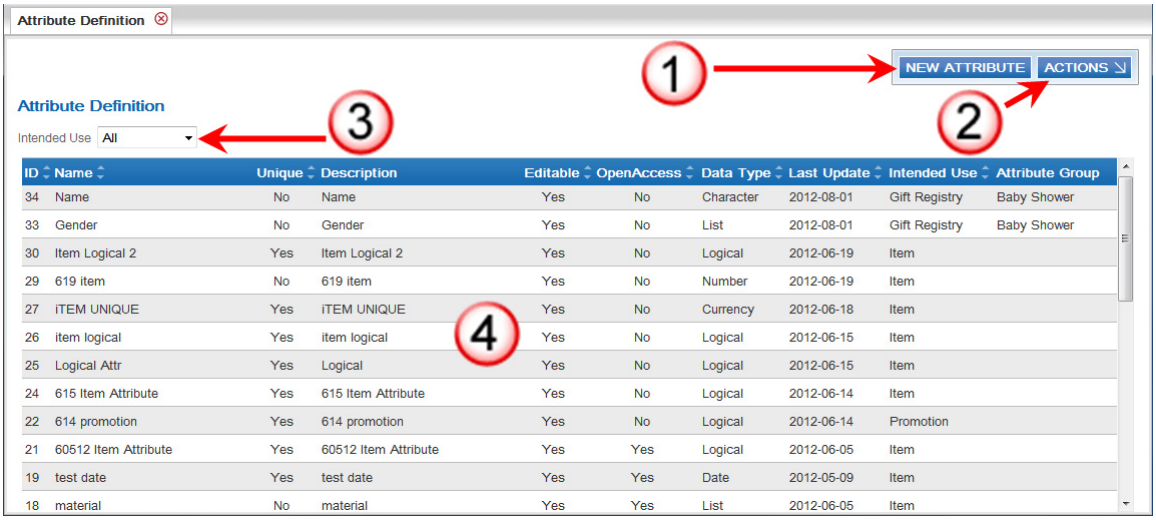
About this Chapter

This chapter contains the following information:

- "Attribute Definition List" on page 580 - Describes the Attribute Definition List and the functionality available in it.

Attribute Definition List

Open the Attribute Definition List using the **Admin->Attribute Definition** menu option, or by clicking the **Attribute Definition** Link on the Main Page.



ID	Name	Unique	Description	Editable	OpenAccess	Data Type	Last Update	Intended Use	Attribute Group
34	Name	No	Name	Yes	No	Character	2012-08-01	Gift Registry	Baby Shower
33	Gender	No	Gender	Yes	No	List	2012-08-01	Gift Registry	Baby Shower
30	Item Logical 2	Yes	Item Logical 2	Yes	No	Logical	2012-06-19	Item	
29	619 item	No	619 item	Yes	No	Number	2012-06-19	Item	
27	ITEM UNIQUE	Yes	ITEM UNIQUE	Yes	No	Currency	2012-06-18	Item	
26	item logical	Yes	item logical	Yes	No	Logical	2012-06-15	Item	
25	Logical Attr	Yes	Logical	Yes	No	Logical	2012-06-15	Item	
24	615 Item Attribute	Yes	615 Item Attribute	Yes	No	Logical	2012-06-14	Item	
22	614 promotion	Yes	614 promotion	Yes	No	Logical	2012-06-14	Promotion	
21	60512 Item Attribute	Yes	60512 Item Attribute	Yes	Yes	Logical	2012-06-05	Item	
19	test date	Yes	test date	Yes	Yes	Date	2012-05-09	Item	
18	material	No	material	Yes	Yes	List	2012-06-05	Item	

Figure 20-1: Attribute List

Table 20-1: *Attribute List Page Key*

Item	Description
1	**NEW ATTRIBUTE Button** - Click to create a new Attribute. See "Create a New Attribute" on page 585 for more information.
2	**ACTIONS Menu** - Click to open a menu of actions that can be performed in the Attribute List page. See "Actions Menu" on page 581 for more information.
3	**Filter Menu** - Select criteria in the Filter Menus to view a subset of the Attributes in the Attribute List. See "Filter Menu" on page 581 for more information.

Table 20-1: *Attribute List Page Key (continued)*

Item	Description
4	**Attributes** - A List of Attributes currently in the system. The List displays a limited number of Attributes; use the Filter Menu to narrow down the List and locate a certain Attribute. This List includes the following information for each Attribute: ■ **ID** - Unique ID for the Attribute. ■ **Name** - Name of the Attribute. ■ **Unique** - Indicates whether only one of this Attribute can be set for each element it is assigned to. ■ **Description** - A description of the Attribute. ■ **Editable** - Indicates whether the Attribute can be edited by any User with permission to edit Customer records (**Yes**), or if the Attribute can only be edited by a User with system administration access (**No**). *This field is only used by Customer Attributes.* ■ **OpenAccess** - Indicates whether the Attribute has Open Access. *This field is only used by Customer Attributes.* ■ **Data Type** - The type of data stored in the Attribute value. ■ **Last Update** - Most recent date on which the Attribute was changed. ■ **Intended Use** - The element to which the Attribute is to be assigned. ■ **Attribute Group** - The Attribute Group to which the Attribute belongs.

Actions Menu

The Actions Menu for the Attribute Definition List page has the following option:



- **REFRESH** - Refreshes the list of Attributes, showing any changes made to the list in the time since it was opened.

Filter Menu

The Attribute Definition List includes the following Filter menu:



Figure 20-2: Filter Menu

- **Intended Use** - Filters the List to show only the Attributes with the Intended Use selected. This menu has the following options:
  - ❑ **All** - **[DEFAULT]** Show all Attributes.
  - ❑ **Customer** - Show only Customer Attributes.
  - ❑ **Item** - Show only Item Attributes.

- **Location** - Show only Location Attributes.
- **Promotion** - Show only Promotion Attributes.
- **Gift Registry** - Show only Gift Registry Attributes.
- **Segment** - Show only Segment Attributes.
- **Deal** - Show only Deal Attributes.
- **PromoDeal** - Show only Promo-Deal Attributes.
- **Card** - Show only Card Attributes.

Open an Attribute

To open an Attribute, click the Attribute in the Attribute Definition List. The Attribute opens in an Edit Attribute Definition Window.

Edit Attribute Definition Window

The Edit Attribute Definition Window allows users to view and edit Attribute information.

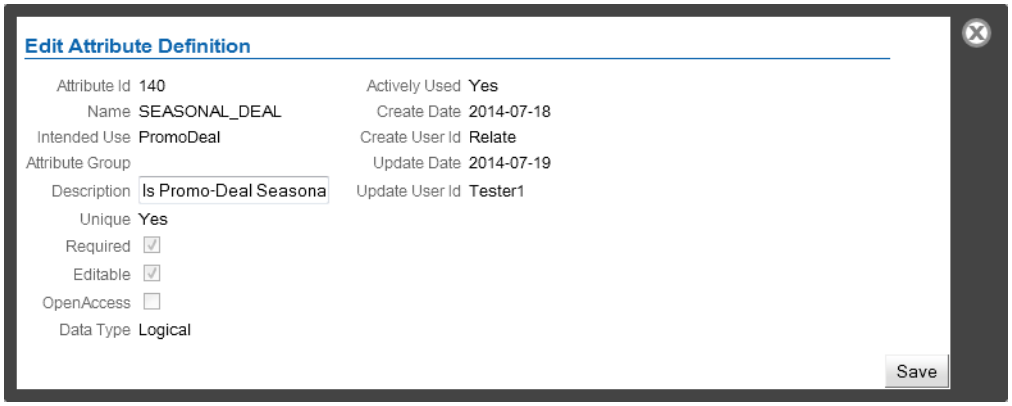


Figure 20-3: Edit Attribute Definition Window

The Edit Attribute Definition Window includes the following information:

- **Attribute Id** - Unique ID for the Attribute.
- **Name** - Name of the Attribute.
- **Intended Use** - The element to which the Attribute is to be assigned. This field has the following possible values:
  - **Customer** - Can be assigned to Customer records.
  - **Item** - Can be assigned to Item records.
  - **Location** - Can be assigned to Location records.
  - **Promotion** - Can be assigned to Promotion records.
  - **Gift Registry** - Can be assigned to Customer Gift Registry records.
  - **Segment** - Can be assigned to Segments.
  - **Deal** - Can be assigned to Deals.

- **PromoDeal** - Can be used to categorize Deals within the context of a Promotion.
- **Card** - Can be assigned to Cards.

- **Attribute Group** - The Attribute Group to which the Attribute belongs.
- **Description** - A description of the Attribute.
- **Unique** - Indicates whether the Attribute can be assigned to an element more than once.
  - **Yes** - The Attribute can only be assigned to an element once.
  - **No** - The Attribute can be assigned to an element multiple times.

    If the **Data Type** is set to **Logical**, the element will be unique.
- **Required** - Indicates whether each Intended Use element must be assigned this Attribute. *Only displayed if the Intended Use is* **Promotion** *or* **Gift Registry**.
  - **Checked (☑)** - The Attribute must be assigned.
  - **Unchecked (☐)** - The Attribute is optional.
- **Editable** - Indicates whether the value set for the attribute can be edited by a user who does not have system administration access.
  - **Checked (☑)** - The Attribute value can be edited.
  - **Unchecked (☐)** - The Attribute value cannot be edited.
- **OpenAccess** - Indicates whether there is open access to this attribute.
  - **Checked (☑)** - The Attribute has open access.
  - **Unchecked (☐)** - The Attribute does not have open access.
- **Data Type** - The type of data stored in the Attribute value. This field has the following possible values:
  - **Character** - The Attribute stores a string of character data entered through a Text Field.
  - **Number** - The Attribute stores a number value entered through a Text Field.
  - **Currency** - The Attribute stores a currency amount entered through a Text Field.
  - **Date** - The Attribute stores a date entered through a Calendar Menu.
  - **Logical** - The Attribute stores a true or false value selected through a Selection Menu.
  - **List** - The Attribute stores one of a number of defined values selected through a Selection Menu.

- If the Data Type is **List**, the Window contains a Value Definition area.

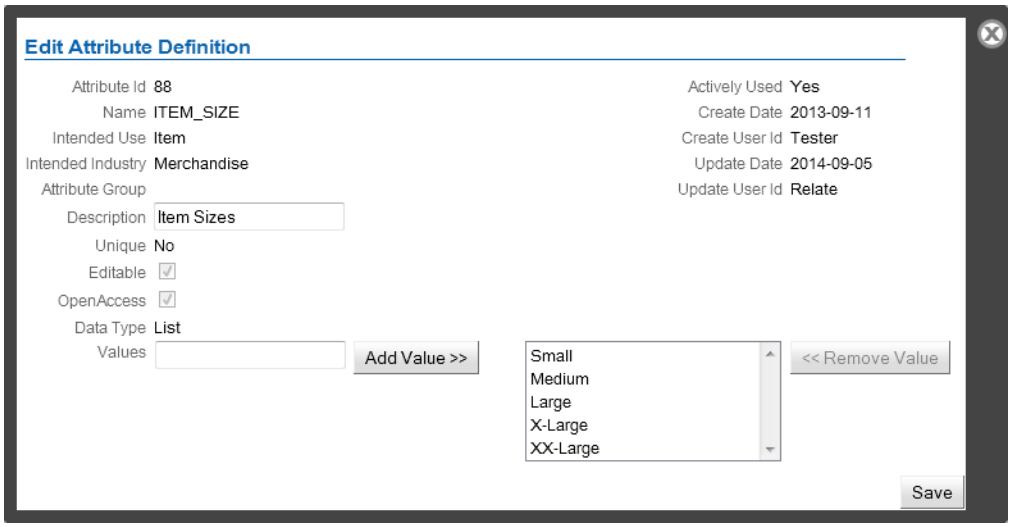


Figure 20-4: Edit Attribute Definition Window - List Value Definition

- **Create Date** - Date the Attribute was created.
- **Create User Id** - ID of the user who created the Attribute.
- **Update Date** - Date the Attribute was last updated.
- **Update User** - ID of the user who performed the last update to the Attribute.

Edit an Attribute

After you Open an Attribute in an Edit Attribute Definition Window, the Attribute can be edited. Make any changes to the Attribute, then click the **Save** button to save the changes and close the Window.

Delete an Attribute



Attributes can only be deleted if they are not actively used. Once an Attribute has been actively used, it cannot be deleted.

To delete an attribute:

1. Open an Attribute in an Edit Attribute Definition Window.
2. Click the **Delete** button.

   A confirmation prompt opens.

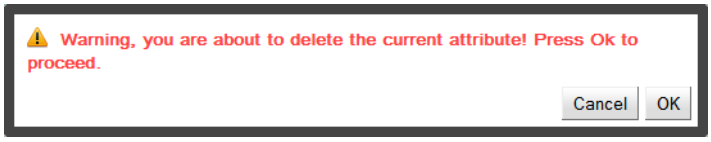


Figure 20-5: Delete Attribute Confirmation

3. Click the **OK** button to delete the Attribute and return to the Attribute Definition List, or click the **Cancel** button to return to the Edit Attribute Definition Window without deleting the Attribute.

Create a New Attribute

To create a new Attribute:

1. In the Attribute Definition List page, click the **NEW ATTRIBUTE** button.

   A Create Attribute Definition Window opens.

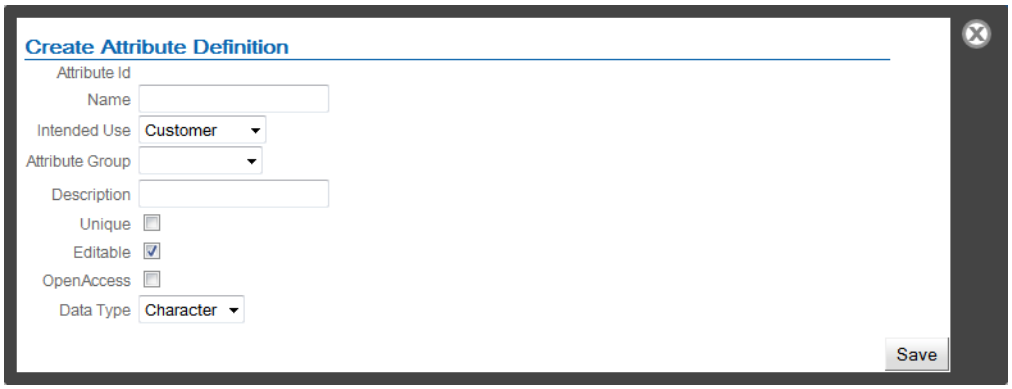
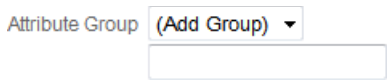


Figure 20-6: Create Attribute Definition Window

2. Enter the configuration information for the new Attribute:
   - **Name** - Name of the Attribute.
   - **Intended Use** - The element to which the Attribute is to be assigned. The Selection Menu has the following options:
     - **Customer** - **[DEFAULT]** The Attribute will be assigned to Customer records.
     - **Item** - The Attribute will be assigned to Item records.
     - **Location** - The Attribute will be assigned to Location records.
     - **Promotion** - The Attribute will be assigned to Promotion records.
     - **Gift Registry** - The Attribute will be assigned to Customer Gift Registries.
     - **Segment** - The Attribute will be assigned to Segments.
     - **Deal** - The Attribute will be assigned to Deals.
     - **PromoDeal** - The Attribute will be used to categorize Deals within the context of a Promotion.
     - **Card** - The Attribute will be assigned to Cards.
   - **Attribute Group** - This Selection Menu determines the Attribute Group to which the Attribute belongs. Select the Attribute Group, or select **(Add Group)** to create a new Attribute Group.

If you select **(Add Group)**, a Text Field opens. Enter the name of the new Attribute Group in the Text Field.



- **Description** - A description of the Attribute.
- **Unique** - This Check Box determines whether the Attribute can be assigned to an element more than once.
  - **Checked (☑)** - The Attribute can only be assigned to an element once.

> *If the* **Data Type** *is set to* **Logical**, *the element will be automatically set to be Unique.*

  - **Unchecked (☐)** - **[DEFAULT]** The Attribute can be assigned to an element multiple times.
- **Required** - This Check Box determines whether each **Intended Use** element must have a value for this Attribute. *This option is only available if* **Intended Use** *is set to* **Promotion**, **Gift Registry** *or* **Card**.
  - **Checked (☑)** - The Attribute must be assigned.
  - **Unchecked (☐)** - **[DEFAULT]** The Attribute is optional.
- **Editable** - This Check Box determines whether the value set for the attribute can be edited by a user who does not have system administration access. *This option is only active if Intended Use is set to* **Customer**, *or if the User has the Relate_SystemAdmin Role assigned, and the Intended Use is* **Card**.
  - **Checked (☑)** - **[DEFAULT]** The Attribute value can be edited.
  - **Unchecked (☐)** - The Attribute value cannot be edited.
- **OpenAccess** - This Check Box determines whether there is open access to this attribute. *This option is only active if Intended Use is set to* **Customer**, *or if the User has the Relate_SystemAdmin Role assigned, and the Intended Use is* **Card**.
  - **Checked (☑)** - The Attribute has open access.
  - **Unchecked (☐)** - **[DEFAULT]** The Attribute does not have open access.
- **Data Type** - The type of data stored in the Attribute value. This Selection Menu has the following possible values:
  - **Character** - **[DEFAULT]** The Attribute stores a string of character data entered through a Text Field.
  - **Number** - The Attribute stores a number value entered through a Text Field.
  - **Currency** - The Attribute stores a currency amount entered through a Text Field.
  - **Date** - The Attribute stores a date entered through a Calendar Menu.
  - **Logical** - The Attribute stores a true or false value selected through a Selection Menu.

- **List** - The Attribute stores one of a number of defined values selected through a Selection Menu. If this option is selected, a value definition area opens in the Window.

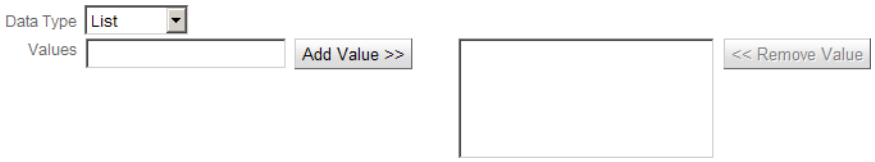


Figure 20-7: List Value Definition

3. If the Data Type selected for the Attribute is **List**, perform the following steps; otherwise, continue with step 4.
   a. In the **Values** field, enter a new value for the Attribute.
   b. Click **Add Value >>**.

      The value is added to the list of values.



Figure 20-8: New Value Added

   c. Repeat steps a-b for each value to add to the list.
   d. To remove a value, click the value in the list of current values, then click **<< Remove Value**.

      The value is removed from the list.
4. Click **Save**.

   The Attribute is added to the Attribute Definition List and the Create Attribute Definition Window closes.

CHAPTER 21

Tasks

Overview

Tasks define responsibilities for Users. Users are expected to log into Relate each workday to check their Tasks for the day.

About this Chapter

This chapter includes the following information:

- "My Tasks" on page 589 - This screen displays all the Tasks assigned to the current User. This screen allows Users to quickly find and view the Tasks that have been assigned to them.
- "Search Tasks" on page 593 - This screen is used to search for Tasks throughout Relate. Depending upon the permissions given to the User, the User can use this screen to search for Tasks assigned to other Users.
- "Edit Task Window" on page 598 - This Window, which is used by both the My Tasks and the Search Tasks screen, provides Users with the ability to view details about, and make updates to, individual Tasks.

My Tasks

The My Tasks List screen is opened using the **Admin->My Tasks** menu option, or by clicking the **My Tasks** Link on the Main Page.

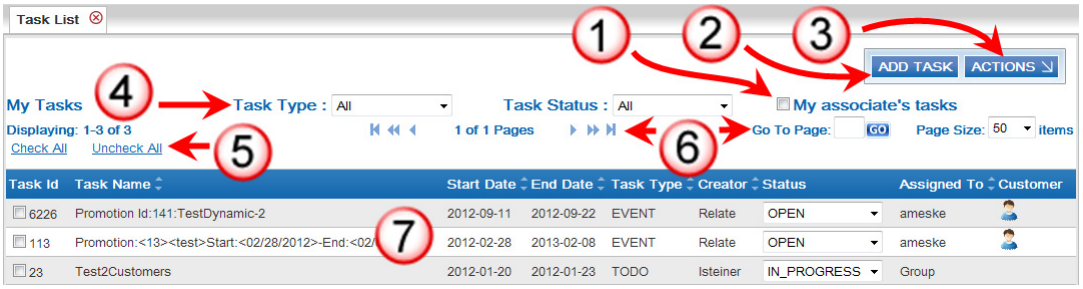


Figure 21-1: My Tasks

Table 21-1: *Task List Page Key*

Item	Description
1	**My Associate's Tasks** - This Check Box determines whether the Tasks List displays the current User's Tasks, or the Tasks for the associates that the current User manages. *This Check Box is only available for Users designated as Managers.* **See also:** The *Relate Configuration Guide* for more information about configuring Users.
2	**Add Task Button** - Click to create a new Task. See "Create a Task" on page 604 for more information.
3	**Actions Menu** - Click to open a menu of actions that can be performed in the Task List page. See "Actions Menu" on page 590 for more information.
4	**Filter Menu** - Select criteria in the Filter Menus to view a subset of the Tasks in the Task List. See "Filter Menus" on page 590 for more information.
5	**Check Options** - Links to place or remove a check mark (☑) in each Check Box displayed in the current screen.
6	**Page Navigation** - Page Navigation for the List.

Table 21-1: *Task List Page Key (continued)*

Item	Description
7	**Tasks** - A List of Tasks currently in the system. The List displays a limited number of Tasks; use the Filter Menu to narrow down the List and locate a certain Task. This List includes the following information for each Task: ■ **Task Id** - ID of the Task. ■ **Task Name** - Name of the Task. ■ **Start Date** - Date on which the Task starts. ■ **End Date** - Date on which the Task ends. ■ **Task Type** - Type of Task. ■ **Creator** - ID of the User who created the Task. ■ **Status** - Status of the Task. ■ **Assigned To** - ID of the User to whom the Task is assigned. ■ **Customer** - Indicates whether the Task is associated with a Customer; if it is, an icon ( ) will appear in this field.

Actions Menu

The Actions Menu for the Task List page has the following options:



- **REFRESH** - Refreshes the list of Tasks, showing any changes made to the list in the time since it was opened.
- **RE-ASSIGN** - Reassign the Task to a different User. See "Reassign a Task" on page 591.

Filter Menus

The Task List includes the following Filter menus:

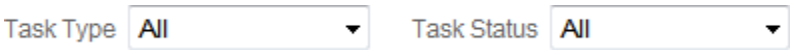


Figure 21-2: Filter Menus

- **Task Type** - Filters the List to show only the Tasks with the Task Type selected. The options in this Selection Menu depend upon configuration.

See also: *Relate Configuration Guide* for information about configuring Task types.

- **Task Status** - Filters the List to show only the Tasks with the Task Status selected. This Selection Menu has the following options:
  - **All** - **[DEFAULT]** Show Tasks of all statuses.
  - **OPEN** - Show only open Tasks.

- **IN_PROGRESS** - Show only Tasks that are in progress.
- **CANCELLED** - Show only Tasks that have been cancelled.
- **CLOSED** - Show only Tasks that have been closed.

Change Task Status

The status of a Task can be changed in the My Tasks List.

In the My Tasks List, use the **Status** Selection Menu to select a new status for the Task.

Open/Edit a Task

See "Open/Edit a Task" on page 601.

Reassign a Task

To reassign a Task to a different User, do the following:

1. In the My Tasks List, click to enter a check mark (☑) in the **Task Id** Check Box for each Task being reassigned.
2. Open the Actions Menu for the My Tasks List.
3. Click **RE-ASSIGN** in the Actions Menu.

   A Reassign User Window opens.

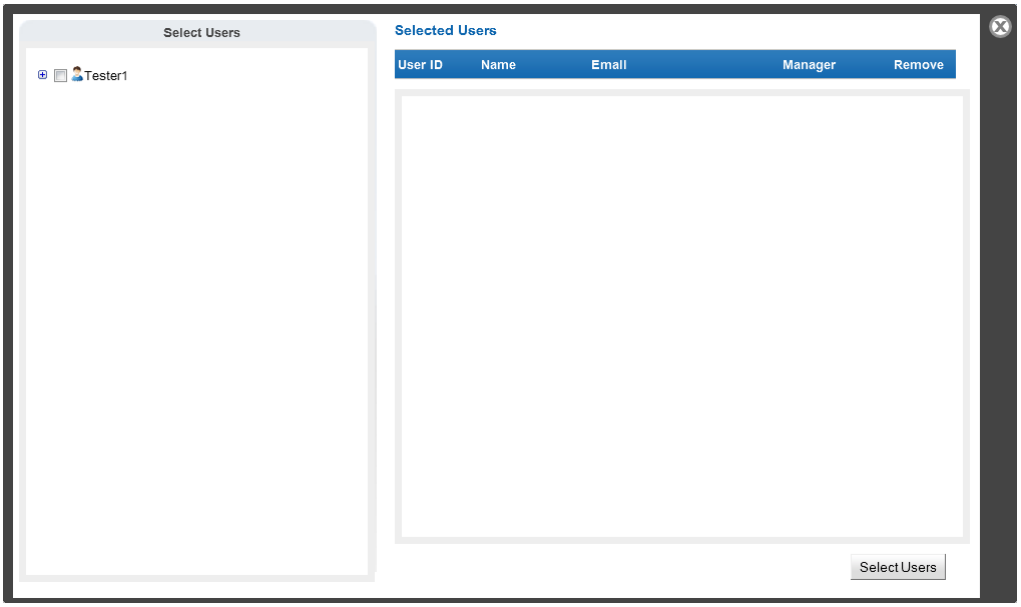
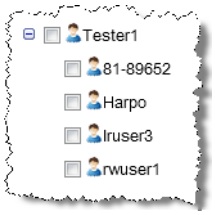


Figure 21-3: Reassign User Window

4. In the Select Users area, use the expand buttons (⊞) to open the User hierarchy and find the User to be assigned the Task. *A hierarchy will only be available for Users with associates assigned to them.*



5. Click to enter a check mark (☑) in the Check Box for the appropriate User(s).



- Only one User can be selected for APPOINTMENT, EVENT, TODO, and MEETING, and TASK type Tasks.
- One or more User(s) can be selected for ADMIN Tasks.

The User(s) appears in the Selected Users List.

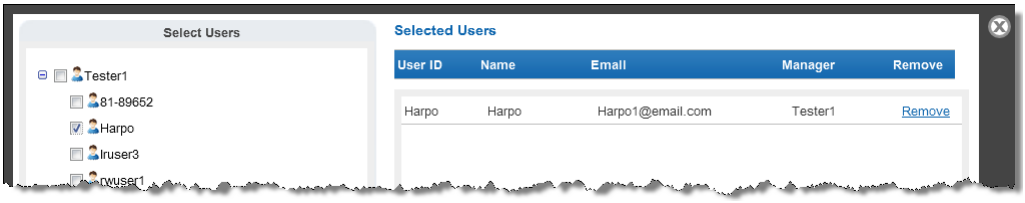


Figure 21-4: Assign User Window - User Selected

6. Click the **Select Users** button to change the assigned User and close the Window.

- ❑ To replace the User, enter a check mark (☑) in the Check Box for a different User.
- ❑ To remove a User, click the **Remove** Link.
- ❑ To close the Window without changing the assigned User, click the **X** () in the top-right corner of the Window.

Search Tasks

The Search Tasks screen provides Users with the ability to search for Tasks stored in Relate.

The Search Tasks screen is opened using the **Admin->Search Tasks** menu option, or by clicking the **Search Tasks** Link on the Main Page.

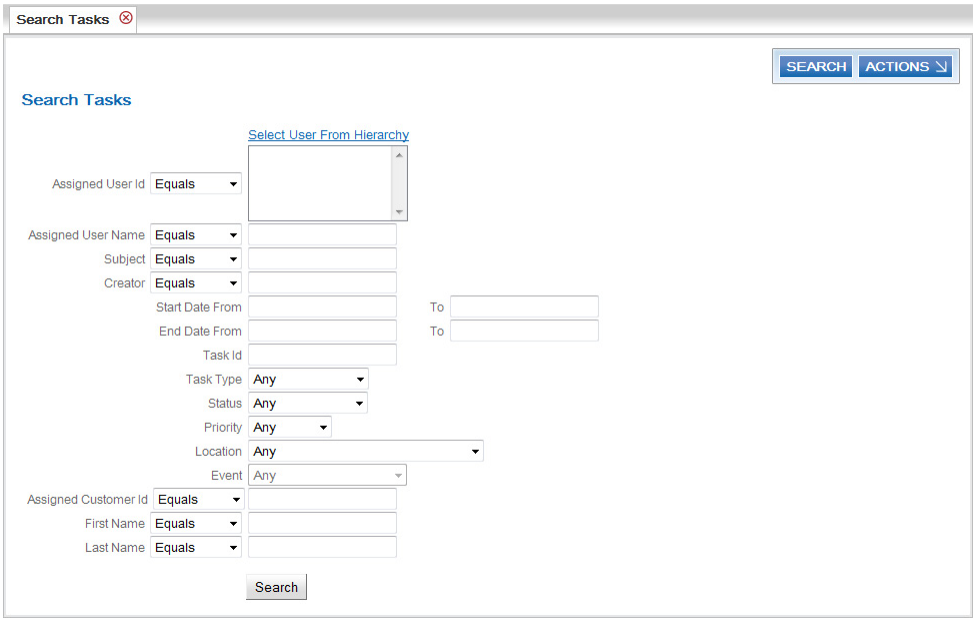


Figure 21-5: Search Tasks Screen

Search Tasks Screen

The Search Tasks screen includes the following fields:

- **Select User From Hierarchy** - This Link provides the ability to select a set of Users that are assigned to the current User. These selected Users are then entered into the **Assigned User Id** field (see below). See "Select Users From Hierarchy" on page 595 for more information.
- **Assigned User Id** - A list of IDs of the User to whom the Task is assigned. Uses a Multi-Select Menu and an inactivated Matching Rule Menu set only to **In**. *This field is populated through the Select User From Hierarchy Link. It cannot be edited directly.*
- **Assigned User Name** - Name of the User to whom the Task is assigned. Uses a Matching Rule Menu and Text Field.
- **Subject** - Subject of the Task. Uses a Matching Rule Menu and Text Field.
- **Creator** - ID of the User who created the Task. Uses a Matching Rule Menu and Text Field.
- **Start Date** - Sets a date range to search for the Task's start date.
  - **From** - This Calendar Menu sets the beginning of the date range.
  - **To** - This Calendar Menu sets the end of the date range.
- **End Date** - Sets a date range to search for the Task's end date.

- **From** - This Calendar Menu sets the beginning of the date range.
- **To** - This Calendar Menu sets the end of the date range.

- **Task Id** - ID of the Task.
- **Task Type** - Type of Task. The options in this Selection Menu depend upon configuration.

See also: *Relate Configuration Guide* for information about configuring Task types.

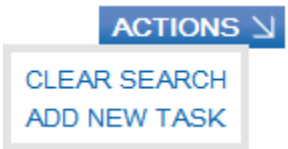
- **Status** - Status of the Task. This Selection Menu has the following options:
  - **All** - **[DEFAULT]** Show Tasks of all statuses.
  - **OPEN** - Show only open Tasks.
  - **IN_PROGRESS** - Show only Tasks that are in progress.
  - **CANCELLED** - Show only Tasks that have been cancelled.
  - **CLOSED** - Show only Tasks that have been closed.
- **Priority** - Priority of the Task. The options in this Selection Menu depend upon configuration.

See also: *Relate Configuration Guide* for information about configuring Task priorities.

- **Location** - Location of the Task. This Selection Menu is populated with Locations.
- **Event** - The Promotion Event associated with the Task. This Selection Menu is only enabled when the **Task Type** is set to "EVENT".
- **Assigned Customer Id** - ID of the Customer with whom the Task is associated. Uses a Matching Rule Menu and Text Field.
- **First Name** - First name of the Customer with whom the Task is associated. Uses a Matching Rule Menu and Text Field.
- **Last Name** - Last name of the Customer with whom the Task is associated. Uses a Matching Rule Menu and Text Field.

Actions Menu

The Actions Menu for the Search Tasks page has the following options:



- **CLEAR SEARCH** - Remove all information entered into the search criteria fields.
- **ADD NEW TASK** - Add a new Task. See "Create a Task" on page 604.

Select Users From Hierarchy

To select one or more Users from a hierarchy, do the following:

1. Click the **Select User From Hierarchy** Link in the Search Tasks page.

   A Select Users Window opens.

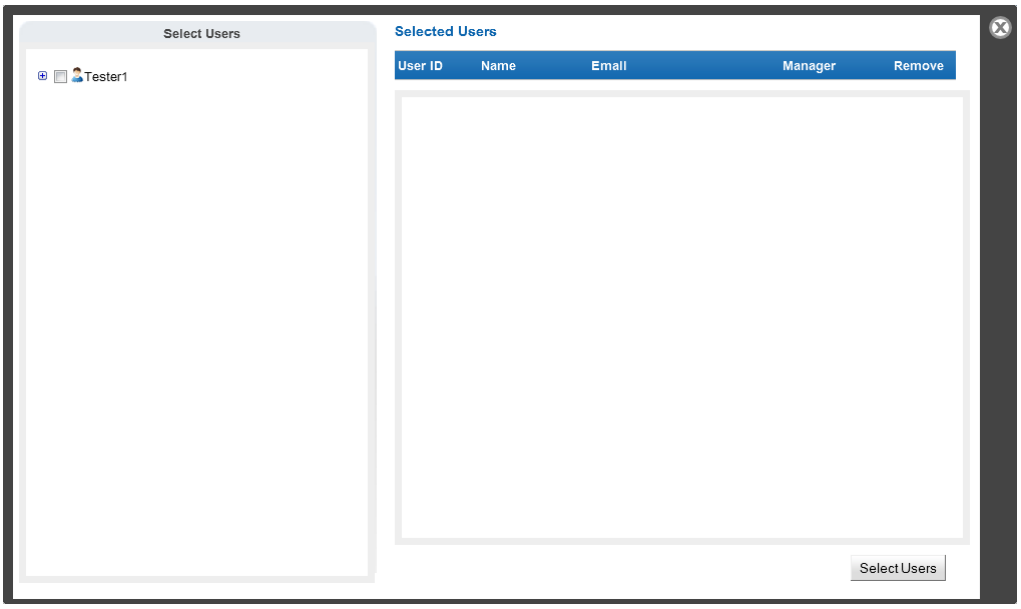
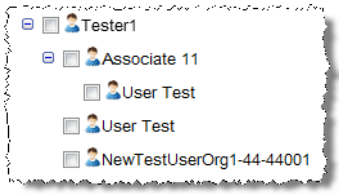


Figure 21-6: Select Users Window

2. In the Select Users area, use the expand buttons (⊞) to open the User hierarchy and find the User(s) to be selected. *A hierarchy will only be available for Users with associates assigned to them.*



3. Click to enter a check mark (☑) in the Check Box for the appropriate User(s).

   The User(s) appear in the Selected Users List.

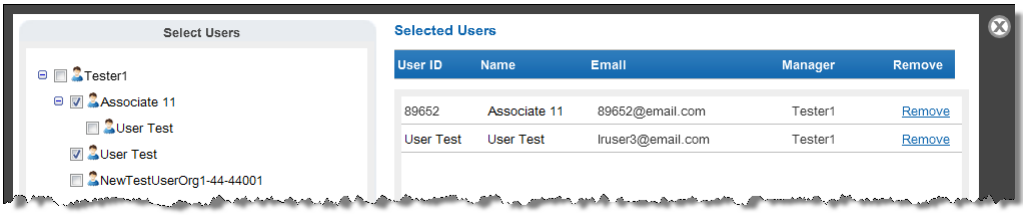


Figure 21-7: Select User Window - Users Selected

4. Click the **Select Users** button to accept the User(s) and close the Window.

   - ❑ To remove a User, click the **Remove** Link.
   - ❑ To close the Window without selecting a User, click the **X** (⊗) in the top-right corner of the Window.

Task List

The Task List page is accessed through the Search Tasks process.

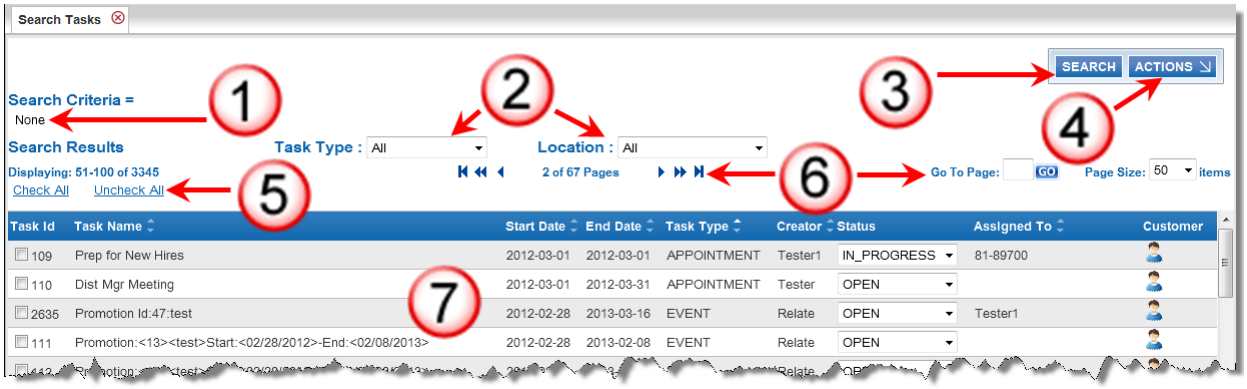


Figure 21-8: Task Search Results Screen

Table 21-2: *Task Search Results Page Key*

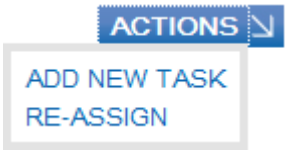
Item	Description
1	**Search Criteria** - Displays the search criteria used for the search results displayed in the List.
2	**Filter Menus** - Select criteria in the Filter Menus to view a subset of the Tasks in the Task List. See "Filter Menus" on page 597 for more information.
3	**Search Button** - Return to the Search Tasks screen to perform another search.
4	**Actions Menu** - Click to open a menu of actions that can be performed in the Task List page. See "Actions Menu" on page 597 for more information.
5	**Check Options** - Links to place or remove a check mark (☑) in each Check Box displayed in the current screen.
6	**Page Navigation** - Page Navigation for the List.

Table 21-2: *Task Search Results Page Key (continued)*

Item	Description
7	**Tasks** - A List of Tasks that meet the entered search criteria. The List displays a limited number of Tasks; use the Filter Menu to narrow down the List and locate a certain Task. This List includes the following information for each Task: ■ **Task Id** - ID of the Task. ■ **Task Name** - Name of the Task. ■ **Start Date** - Date on which the Task starts. ■ **End Date** - Date on which the Task ends. ■ **Task Type** - Type of Task. ■ **Creator** - ID of the User who created the Task. ■ **Status** - Status of the Task. ■ **Assigned To** - ID of the User to whom the Task is assigned. ■ **Customer** - Indicates whether the Task is associated with a Customer; if it is, an icon ( ) will appear in this field.

Actions Menu

The Actions Menu for the Task List page has the following options:



- **ADD NEW TASK** - Add a new Task. See "Create a Task" on page 604.
- **RE-ASSIGN** - Reassign the Task to a different User. See "Reassign a Task" on page 591.

Filter Menus

The Task Search Results List includes the following Filter menus:



Figure 21-9: Filter Menus

- **Task Type** - Filters the List to show only the Tasks with the Task Type selected. The options in this Selection Menu depend upon configuration. To show Tasks of all types, select **All** **[DEFAULT]**.

See also: *Relate Configuration Guide* for information about configuring Task types.

- **Location** - Filters the List to show only the Tasks for the selected location. To show Tasks for all locations, select **All** **[DEFAULT]**.

Edit Task Window

The Edit Task Window allows Users to view and edit Task information:

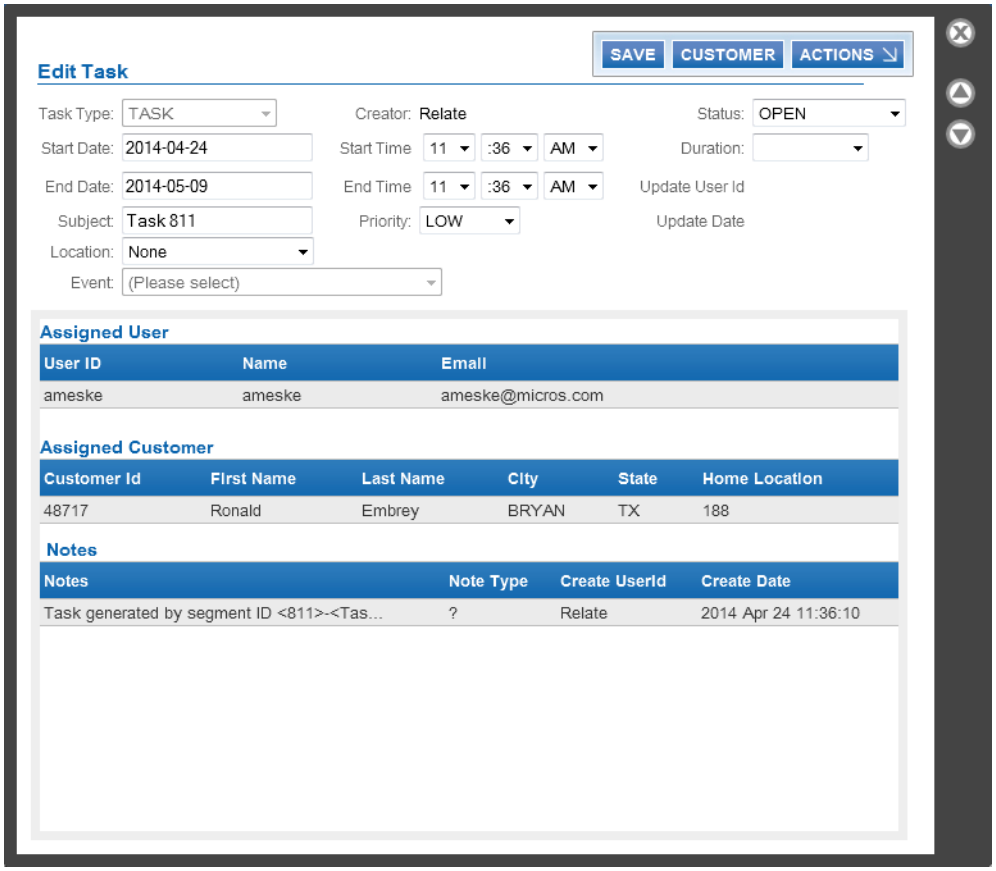


Figure 21-10: Edit Task Window

The Edit Task Window displays the following information:

- **Task Type** - Type of Task. The options in this Selection Menu depend upon configuration. *This field cannot be edited.*

See also: *Relate Configuration Guide* for information about configuring Task types.

- **Start Date** - This Calendar Menu determines the date on which the Task starts.
- **End Date** - This Calendar Menu determines the date on which the Task ends. *This field is only enabled for ADMIN, TODO, MEETING, or TASK Task Types.*
- **Subject** - This Text Field contains the subject of the Task.
- **Location** - This Selection Menu determines the Location where the Task is to be performed.
- **Event** - This Selection Menu determines the Promotion associated with the Task. *This field is only enabled for EVENT Task Types.*

- **Creator** - ID of the User who created the Task.
- **Start Time** - These Time Menus determine the time at which the Task starts
- **End Time** - These Time Menus determine the time at which the Task ends.

> *This field can be set using the Duration field (see below).*

- **Priority** - The priority assigned to the Task. The options in this Selection Menu depend upon configuration.

See also: *Relate Configuration Guide* for information about configuring Task priorities.

- **Status** - The status of the Task.
- **Duration** - The duration of the Task.

> *Use this field to automatically set the End Time to a time, of the selected duration, after the selected Start Time.*

- **Update User Id** - ID of the User who most recently updated the Task. *This field cannot be edited.*
- **Update Date** - Date on which the Task was most recently updated. *This field cannot be edited.*
- **Group Status Summary** - For ADMIN Task Types, this field displays the number of Users at each Status for the Task (see Figure 21-12 below).
- **Assigned User** - A List of the User(s) assigned to the Task.

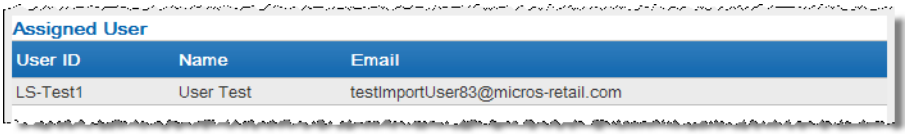


Figure 21-11: Assigned User List - APPOINTMENT, EVENT, TODO, MEETING, or TASK



Figure 21-12: Assigned User List - ADMIN

The following information is displayed for the assigned User:

- **User ID** - ID of the User.
- **Name** - Name of the User.
- **Email** - Email of the User.
- **Status** - The status of the Task for the User. *This Selection Menu is only available for ADMIN Task Types.*

- **Assigned Customer** - A List containing the Customer assigned to the Task. *This List is only displayed for APPOINTMENT, EVENT, TODO, MEETING, or TASK Task Types.*

  The following information is displayed for the assigned Customer:

  - **Customer Id** - ID of the Customer.
  - **First Name** - Customer first name.
  - **Last Name** - Customer last name.
  - **City** - Customer city.
  - **State** - Customer state.
  - **Home Location** - Home location for the Customer.

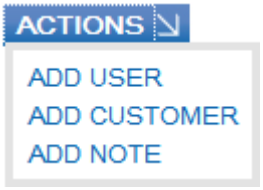
- **Notes** - A List containing Notes added to the Task.

  The following information is displayed for the Notes:

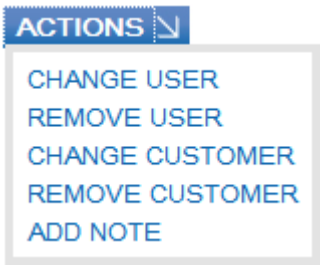
  - **Notes** - Text of the Note.
  - **Note Type** - Type of Note.
  - **Create UserId** - ID of the User who entered the Note.
  - **Create Date** - Date the Note was created.

Actions Menu

The Actions Menu for the Add/Edit Task Window page can include the following options:



- **ADD USER** - Assign the Task to a User. This option will only be available for Tasks that do not have a User assigned (see "Add/Change User" on page 601).
- **CHANGE USER** - Change the User to whom the Task is assigned. This option will only be available for Tasks that have a User assigned (see "Add/Change User" on page 601).
- **REMOVE USER** - Remove the User assigned to the Task. This option will only be available for Tasks that have a User assigned (see "Remove a User" on page 602).
- **ADD CUSTOMER** - Associate the Task with a Customer. This option will only be available for Tasks that are not associated with a Customer (see "Add/Change Customer" on page 602).



- **CHANGE CUSTOMER** - Change the Customer with whom the Task is associated. This option will only be available for Tasks that are associated with a Customer (see "Add/Change Customer" on page 602).
- **REMOVE CUSTOMER** - Remove the association with the Customer. This option will only be available for Tasks that are associated with a Customer (see "Remove a Customer" on page 603).
- **ADD NOTE** - Add a Note to the Task (see "Add a Note" on page 603).

Open/Edit a Task

1. Click the Task in the My Tasks or Search Tasks screen.

   The Task opens in an Edit Task Window.
2. If necessary, make changes to the Task. See "Edit Task Window" on page 598 for a description of the fields that can be changed.
3. Click the **SAVE** button to save any changes and close the Edit Task Window.

   To close the Window without saving changes, click the **X** ( ) in the top-right corner.

Add/Change User

To add or change the User assigned to a Task:

1. Click **ADD USER** or **CHANGE USER** in the Actions Menu for the Edit Task Window, or the Create a Task screen or Window.
2. A Search User Window opens.

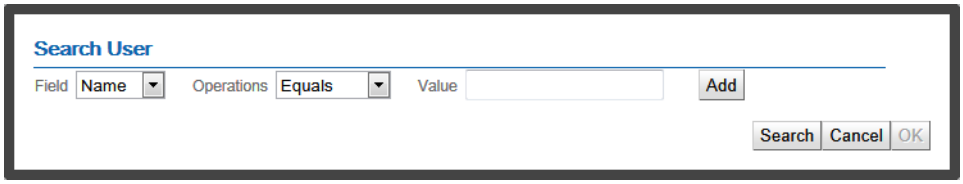


Figure 21-13: Search User Window

3. Use the Search User Window to enter search information for the User, then click the **Search** button to search for Users matching the search criteria.

A List of search results is displayed.

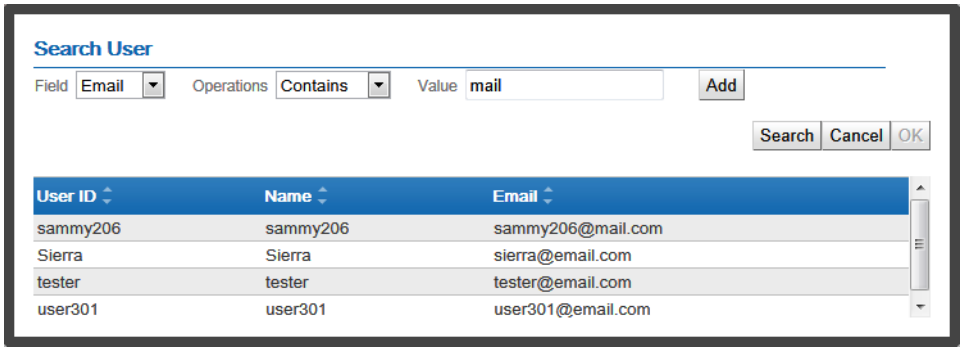


Figure 21-14: Search User Results

4. Click to select the User to associate with the Task.
5. Click the **OK** button to associate the User to the Task and close the Search User Window, returning to the Create a Task or Open/Edit a Task procedure.

   To close the Window without saving the changes, click the **Cancel** button.

Remove a User

To remove a User assigned to a Task, click **REMOVE USER** in the Actions Menu for the Edit Task Window or the Create a Task screen. The User is removed.

> *Relate does not ask for confirmation when removing a User assigned to a Task.* ***The User will be removed as soon as the option is selected.***

Add/Change Customer

To add or change the Customer associated with a Task:

1. Click **ADD CUSTOMER** or **CHANGE CUSTOMER** in the Actions Menu for the Edit Task Window, or the Create a Task screen or Window.

   A Search Customer Window opens.

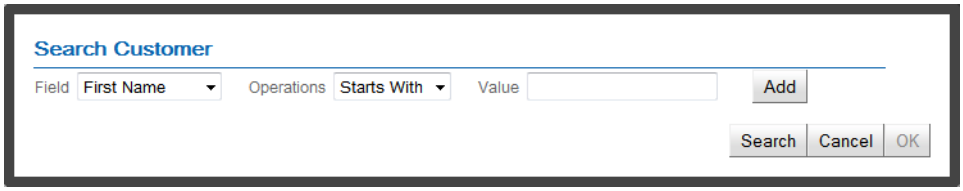


Figure 21-15: Search Customer Window

2. Use the Search Customer Window to enter search information for the customer, then click the **Search** button to search for Customers matching the search criteria.

A List of search results is displayed.

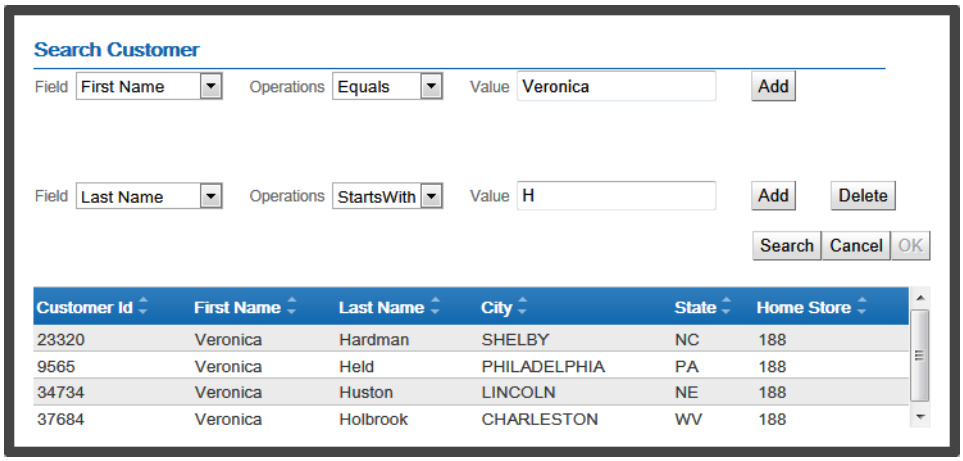


Figure 21-16: Search Customer Results

3. Click to select the Customer to associate with the Task.
4. Click the **OK** button to associate the Customer with the Task and close the Search Customer Window, returning to the Create a Task or Open/Edit a Task procedure.

   To close the Window without saving the changes, click the **Cancel** button.

Remove a Customer

To remove a Customer associated with a Task, click **REMOVE CUSTOMER** in the Actions Menu for the Edit Task Window or the Create a Task screen. The Customer is removed.

> *Relate does not ask for confirmation when removing a Customer association from a Task.* ***The Customer is removed as soon as this option is selected.***

Add a Note

To add a Note to the Task:

1. Click **ADD NOTE** in the Actions Menu for the Edit Task Window or the Create a Task screen.

   An ADD NOTE Window opens.

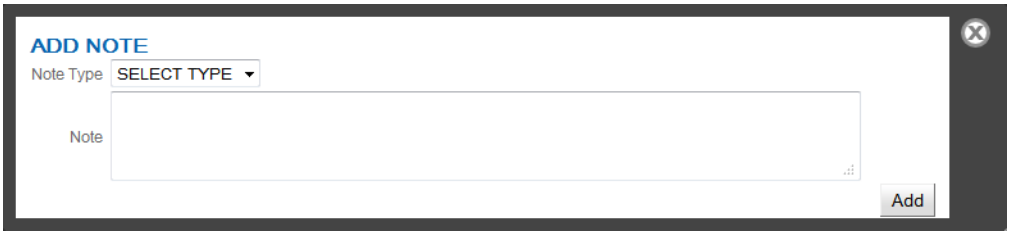


Figure 21-17: Add Note Window

2. Select the Note Type in the Selection Menu.
3. Enter the Note in the Text Field.
4. Click **Add** to add the note and close the Window.

   To close the Window without saving the changes, click the **X** ( ) in the top-right corner of the Window.

Create a Task

To create a Task in Relate:

1. Start the procedure from the My Tasks page, the Task List page, or the Tasks Screen for a Customer.
   - ❑ In the My Tasks page, click the **ADD TASK** button.

     A Create New Task screen opens.

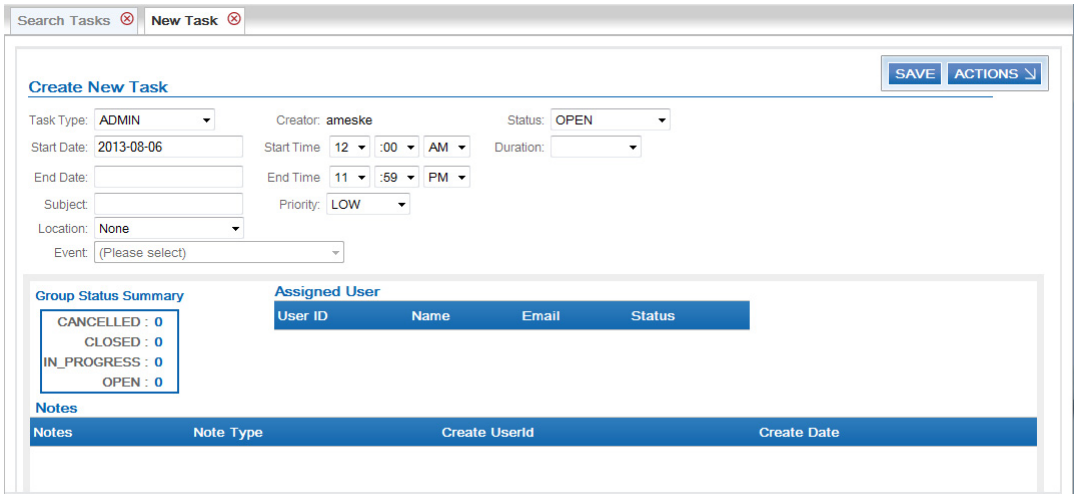


Figure 21-18: Create New Task Screen

   - ❑ In the Task List page, click the **ADD NEW TASK** selection Actions Menu, or click the ADD TASK button in the the Customer Tasks Screen.

A Create New Task Window opens.

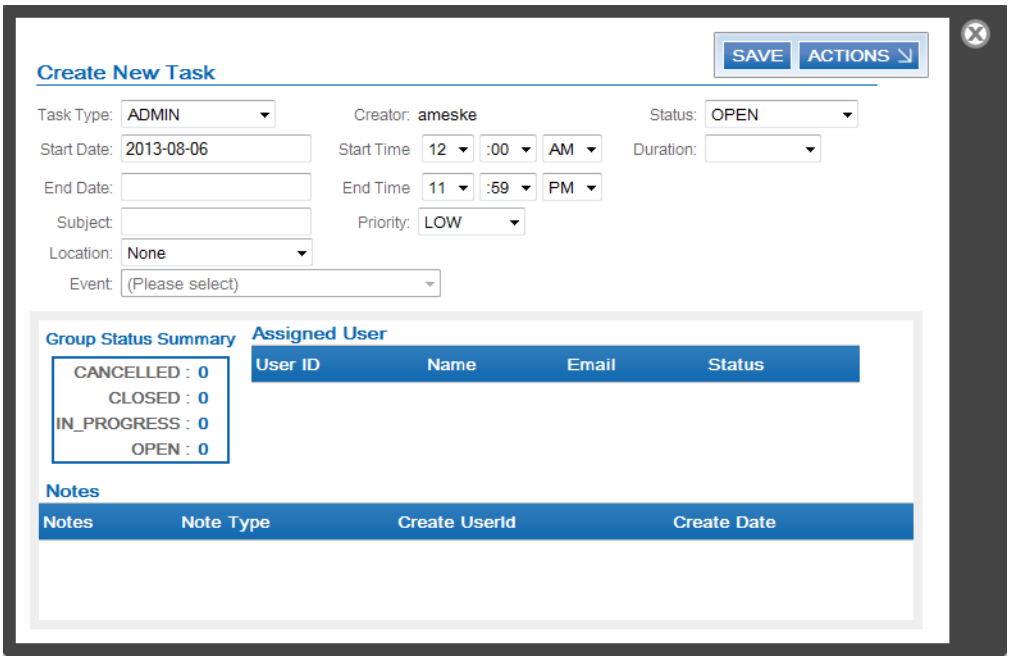


Figure 21-19: Create New Task Window

2. Select the **Task Type**. The options in the Selection Menu depend upon configuration.

See also: *Relate Configuration Guide* for information about configuring Task types.

3. Configure the Task. Many of the options available depend upon the Task Type.

- **Start Date** - This Calendar Menu determines the date on which the Task starts.
- **End Date** - This Calendar Menu determines the date on which the Task ends.
- **Subject** - This Text Field contains the subject of the Task.
- **Location** - This Selection Menu determines the Location where the Task is to be performed.
- **Event** - This Selection Menu determines the Promotion associated with the Task. *This field is only enabled for EVENT Task Types.*
- **Creator** - ID of the User who created the Task. *This field cannot be edited.*
- **Start Time** - These Time Menus determine the time at which the Task starts
- **End Time** - These Time Menus determine the time at which the Task ends.



This field can be set using the Duration field (see below).

- **Priority** - The priority assigned to the Task. *The options in this Selection Menu depend upon configuration.*

See also: *Relate Configuration Guide* for information about configuring Task priorities.

- **Status** - The status of the Task. This Selection Menu has the following options:
  - **OPEN** - The Task is open, but not started.
  - **IN_PROGRESS** - The Task has been started, but it not complete.
  - **CANCELLED** - The Task has been cancelled.
  - **CLOSED** - The Task has been completed.
- **Duration** - This Selection Menu determines the duration of the Task.



Use this field to automatically set the End Time to a time, of the selected duration, after the selected Start Time.

4. If necessary, assign a User to the Task (see "Add/Change User" on page 601). The **Assigned User** List displays the User assigned to the Task.



Figure 21-20: Assigned User List - APPOINTMENT, EVENT, TODO, MEETING, or TASK



Figure 21-21: Assigned User List - ADMIN

The following information is displayed for the assigned User(s):

- **User ID** - ID of the User.
- **Name** - Name of the User.
- **Email** - Email of the User.
- **Status** - This Selection Menu determines the status of the Task for the User. *This field, along with the Group Status Summary, is only displayed for ADMIN Task Types.*

5. If necessary, associate a Customer with the Task (see "Add/Change Customer" on page 602). The **Assigned Customer** List displays the Customer assigned to the Task. *This List is only displayed for APPOINTMENT, EVENT, TODO, MEETING, or TASK Task Types.*



Figure 21-22: Assigned Customer List

The following information is displayed for the assigned Customer:

- **Customer Id** - ID of the Customer.
- **First Name** - Customer first name.
- **Last Name** - Customer last name.
- **City** - Customer city.
- **State** - Customer state.
- **Home Location** - Home location for the Customer.

6. If necessary, add a Note(s) to the Task (see "Add a Note" on page 603). The **Notes** List displays the Notes added to the Task.

   The following information is displayed for the Notes:

   - **Notes** - Text of the Note.
   - **Note Type** - Type of Note.
   - **Create UserId** - ID of the User who entered the Note.
   - **Create Date** - Date the Note was created.

7. Click **SAVE** to create the Task and exit the screen.

   To exit without saving the changes, click the **X** (⊗) in the Tab, or the **X** () in the top-right corner of the Window.

CHAPTER 22

Process Queue

Overview

In Relate, the Process Queue displays information about previously run Jobs.

About this Chapter

This chapter contains the following information:

- "Process Queue" on page 609 - Describes the Process Queue page.
- "Job Results Window" on page 611 - Describes the Job Results Window.

Process Queue

The Process Queue page is opened using the **Admin->Process Queue** menu option, or by clicking the **Process Queue** Link on the Main Page.

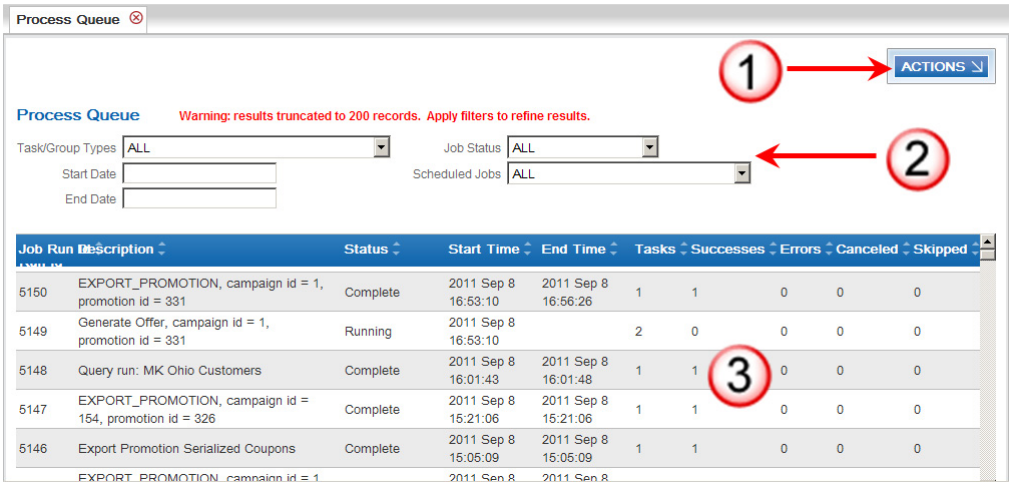


Figure 22-1: Process Queue Page

Table 22-1: *Process Queue Page Key*

Item	Description
1	**Actions Menu** - Click to open a menu of actions that can be performed in the Process Queue page. See "Actions Menu" on page 610 for more information.
2	**Filter Menus** - Select criteria in the Filter Menus to view a subset of the Jobs in the Process Queue. See "Filter Menus" on page 610 for more information.
3	**Process Queue List** - A List of Jobs that were run by the system. The List displays a limited number of Jobs; use the Filter Menus to narrow down the List and locate a certain Job.

The Process Queue List displays the following information for each Job:

- **Job Run ID** - ID Number of the Job.
- **Description** - Description of the Job.
- **Status** - Current status of the Job.
- **Start Time** - The date and time at which the Job started running.
- **End Time** - The date and time at which the Job stopped running.
- **Tasks** - The number of Tasks performed by the Job.
- **Successes** - The number of Tasks completed successfully by the Job.
- **Errors** - The number of Tasks in the Job that resulted in an Error.

- **Canceled** - The number of Tasks in the Job that were canceled.
- **Skipped** - The number of Tasks in the Job that were skipped.

Open Job

To open a Job, click the Job in the List. The Job is displayed in a Job Results Window.

Actions Menu



The Actions Menu for the Process Queue contains the following option:

- **REFRESH** - Refreshes the List with the most recent Jobs run by the system.

Filter Menus

The Process Queue displays the following Filter fields:

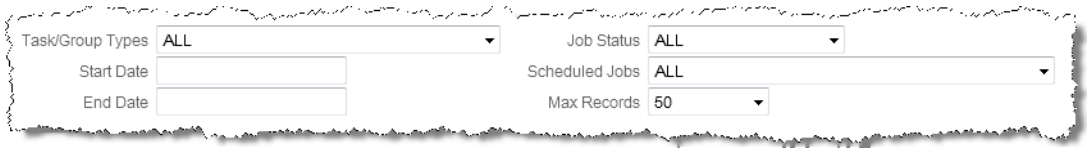


Figure 22-2: Filter Menus

- **Task/Group Types** - Filters the List by Task Type.
- **Start Date** - A Calendar Menu that sets an initial date for a date range filter.
- **End Date** - A Calendar Menu that sets a final date for a date range filter.
- **Job Status** - Filters the List by the current status of the Job.
- **Scheduled Jobs** - Filters the List to show only the previous runs of a specific Scheduled Job.
- **Max Records** - Filters the List to show only up to the selected number of Jobs.

Job Results Window

The Job Results Window displays information about Job opened in the Window, and provides the ability to view the results of the Job.

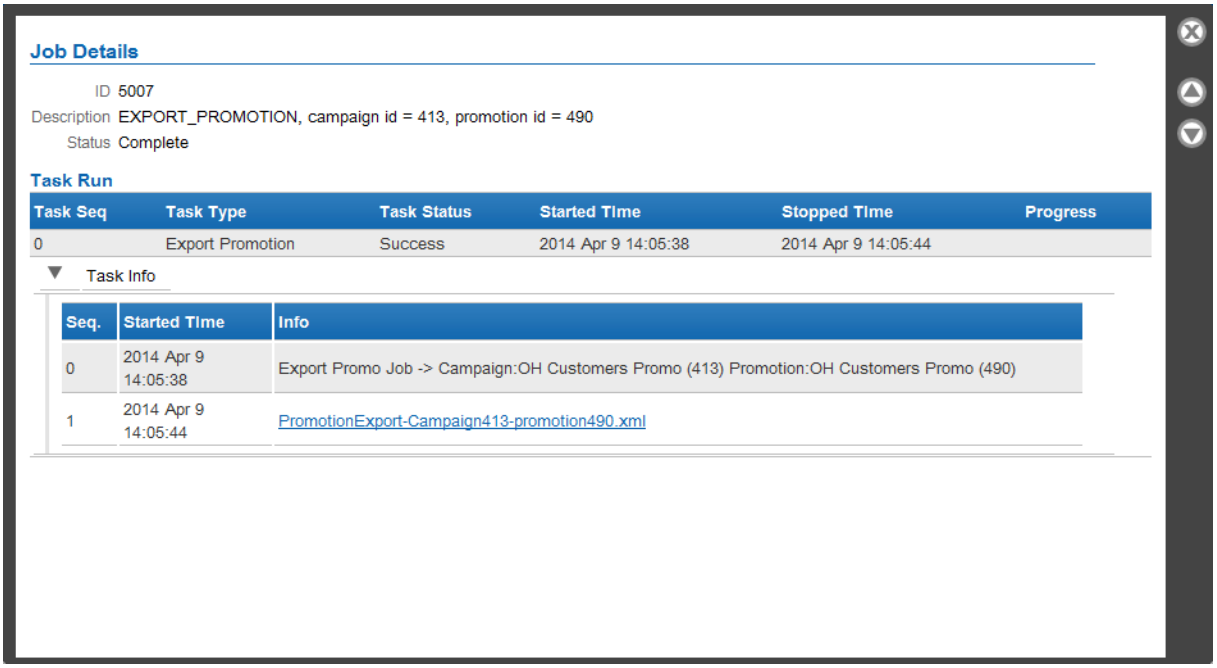


Figure 22-3: Job Results Window

The following information is displayed in the Job Results Window:

- **Job Details** - Information about the Job. This section displays the following information:
- **ID** - ID Number of the Job.
- **Description** - Description of the Job.
- **Status** - Current status of the Job.
- **Task Run** - A List of Tasks performed by the Job. The following information is displayed for each Task:
  - **Task Seq** - The sequence number of the Task within the set of Tasks performed.
  - **Task Type** - The type of Task.
  - **Task Status** - The current status of the Task.
  - **Started Time** - The date and time at which the Task started running.
  - **Stopped Time** - The date and time at which the Task stopped running.
  - **Progress** - If the Task is still running, the current progress of the Task.
  - **Task Info** - A List displaying the actions performed by the Task. The following information is displayed for each action:
    - **Seq** - The sequence number of the action within the set of actions performed by the Task.

- **Started Time** - The date and time at which the action started running.
- **Info** - Information about the action. This can be a summary of the results of the action, or a Link to the export file created by the action.



To open an Export File from a Job, click the Link for the Export File in the Info table cell. A new browser window opens and the Export File is downloaded.

CHAPTER 23

Job Scheduling

Overview

In Relate, Job Scheduling is used to view and edit Jobs scheduled to be run in Relate.

About this Chapter

The chapter includes the following information:

- "Scheduled Jobs List" on page 614 - Describes the Scheduled Jobs List and the functions available on it.
- "Scheduled Job Window" on page 615 - Describes the Scheduled Job Window and its functionality.
- "Schedule a Job" on page 619 - Provides the procedures for scheduling a Job.

Scheduled Jobs List

The Scheduled Jobs List is opened using the **Job Management->Job Scheduling** menu option, or by clicking the **Job Scheduling** Link on the Main Page..

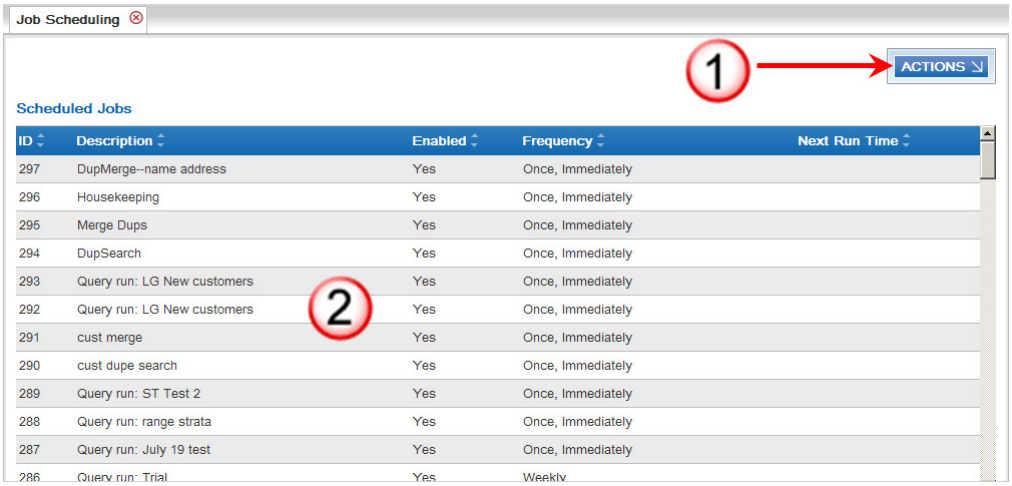


Figure 23-1: Scheduled Jobs List

Table 23-1: *Job Scheduling Page Key*

Item	Description
1	**Actions Menu** - Click to open a menu of actions that can be performed in the Job Scheduling List page. See "Actions Menu" on page 614 for more information.
2	**Scheduled Jobs List** - A List of Jobs that are configured to be run by the system.

The Scheduled Jobs List displays the following information for each Job:

- **ID** - ID Number of the Job.
- **Description** - Description of the Job.
- **Enabled** - Indicates whether the Job is currently enabled.
- **Frequency** - The frequency at which the Job is performed.
- **Next Run Time** - The Time at which the Job will be run next.

Open Scheduled Job

To open a Scheduled Job, click the Job in the List. The Job opens in a Scheduled Job Window.

Actions Menu



The Actions Menu for the Job Scheduling page contains the following option:

- **CREATE** - Create a new Job Schedule.

Scheduled Job Window

The Scheduled Job Window displays information about Job opened in the Window, and provides the ability to update the Job.

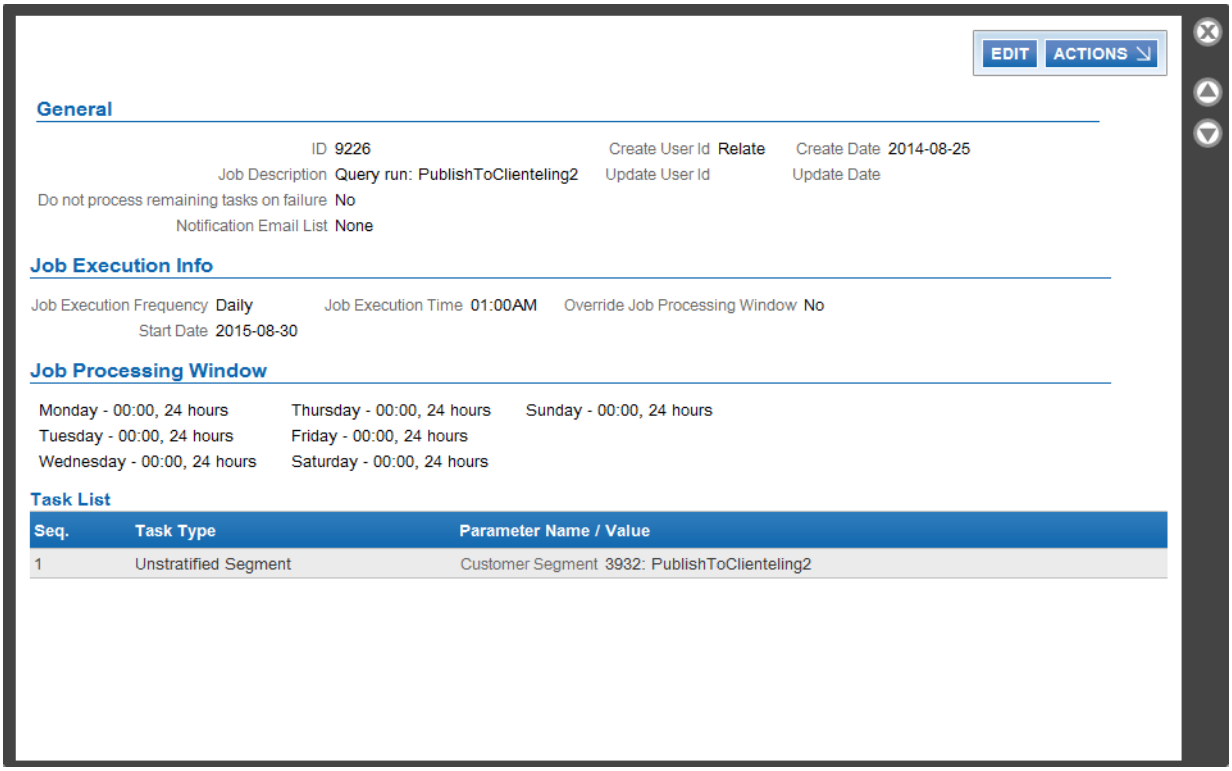


Figure 23-2: Scheduled Job Window

The Scheduled Job Window displays the following information for a Job:

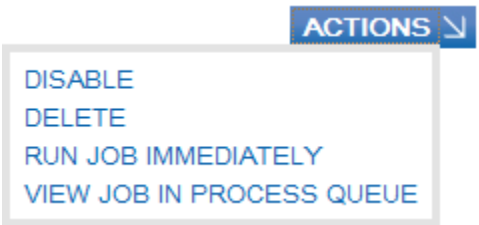
- **General** - General information about the Job. This area displays the following information:
  - **ID** - Unique ID for the Job.
  - **Job Description** - Description of the Job.
  - **Do not process remaining tasks on failure** - Indicates whether the Job will process subsequent Tasks in the Job after an error, or if the Job will end immediately after receiving an error.
  - **Notification Email List** - The email addresses that will receive notification of the results of the job after it completes.
  - **Create User Id** - ID of the user who created the Job.
  - **Update User Id** - ID of the user who last updated the Job.
  - **Create Date** - Date on which the Job was created.
  - **Update Date** - Date on which the Job was last updated.
- **Job Execution Info** - Information about the frequency at which the Job runs.

- **Job Execution Frequency** - The frequency at which the Job runs. This field has the following possible values:
  - **Once, Immediately** - The Job runs as soon as it has been created.
  - **Once, Later** - The Job runs once at a later date.
  - **Daily** - The Job runs once every day.
  - **Daily, Business Days Only** - The Job Runs once a day only on business days (i.e. Monday through Friday).
  - **Weekly** - The Job runs once each week.
  - **Monthly** - The Job runs once each month.
- **Start Date** - The start of the date range in which the job will run (only visible if the Job Frequency Execution is NOT **Once, Immediately**).
- **End Date** - The end of the date range in which the job will run (only visible if the Job Frequency Execution is NOT **Once, Immediately** or **Once, Later**).
- **Day of Week** - The day of the week on which the job will run (only visible if the Job Frequency Execution is **Weekly**).
- **Day of Month** - The day of the month on which the job will run (only visible if the Job Frequency Execution is **Monthly**).
- **Job Execution Time** - The time at which the job will run (only visible if the Job Frequency Execution is NOT **Once, Immediately**).
- **Override Job Processing Window** - Indicates whether the Job was configured to run outside the Job Processing Window.

- **Job Processing Window** - Describes the Job Processing Window for the system (see "Job Processing Window" on page 622 for more information).
- **Task List** - A List of the Tasks performed by the Job, containing the following information for each Task:
  - **Seq.** - The sequence in which the Task is performed within the Job.
  - **Task Type** - The type of Task performed.
  - **Parameter Name / Value** - Additional parameters and associated values set for the Task.

Actions Menu

The Actions Menu for the Scheduled Job Window contains the following options:



- **DISABLE** - Disable the Job (this option only available if the Job is enabled). See "Disable Job" on page 617.
- **ENABLE** - Enable the Job (this option only available if the Job is disabled). See "Enable Job" on page 617.
- **DELETE** - Remove the Job from the system. See "Delete Job" on page 618.

- **RUN JOB IMMEDIATELY** - Run the Job now, regardless of scheduling. See "Run Job Immediately" on page 618.
- **VIEW JOB IN PROCESS QUEUE** - Opens the Process Queue with the Job selected the **Scheduled Jobs** Selection Menu (in the Filter Menus). See Chapter 22, "Process Queue" on page 608 for more information about the Process Queue.

Edit Job

To edit an existing Job opened in a Scheduled Job Window:

1. Click the **EDIT** button in the Scheduled Job Window.

   The Job Create Wizard opens with all fields populated with the current configuration information.
2. Use Wizard Navigation to make any necessary changes. See "Schedule a Job" on page 619 for a description of the fields and information.
3. When you are finished making changes to the Job, do one of the following:
   - ❑ Click **save** to save the Job with the current settings and return to the Scheduled Jobs List.
   - ❑ Click **cancel** to delete all changes and return to the Scheduled Jobs List.

Disable Job

Click **DISABLE** in the Actions Menu to disable a Job opened in a Scheduled Job Window.

After clicking **DISABLE**, the Scheduled Job Window closes and the Enabled field for the Job is set to False in the Scheduled Jobs List.



There is no confirmation prompt when disabling a job.

Enable Job

Click **ENABLE** in the Actions Menu to enable a Job opened in a Scheduled Job Window.

After clicking **ENABLE**, the Scheduled Job Window closes and the Enabled field for the Job is set to True in the Scheduled Jobs List.



There is no confirmation prompt when enabling a job.

Delete Job

Click **DELETE** in the Actions Menu to delete a Job opened in a Scheduled Job Window.

After clicking **DELETE**, the Scheduled Job Window closes and the Job is deleted from the Scheduled Jobs List.



There is no confirmation prompt when deleting a job.

Run Job Immediately

Click **RUN JOB IMMEDIATELY** in the Actions Menu to immediately run a Job opened in a Scheduled Job Window.

After clicking **RUN JOB IMMEDIATELY**, the Scheduled Job Window closes and the Job runs in Relate.



There is no confirmation prompt when running a job immediately.

View Job in Process Queue

Click **VIEW JOB IN PROCESS QUEUE** in the Actions Menu to open the Process Queue and view the previous runs of a Job currently opened in a Scheduled Job Window.

The Process Queue opens with the Job selected in the **Scheduled Jobs** Selection Menu (in the Filter Menus for the Process Queue). This shows all of the previous runs of the selected Job in the Process Queue.



See Chapter 22, "Process Queue" on page 608 for more information about the actions and options available in the Process Queue.

Schedule a Job

To schedule a Job in Relate:

1. In the Scheduled Jobs List, click **Create** in the Actions Menu.

   The Job Create Wizard opens with the Job Description step.

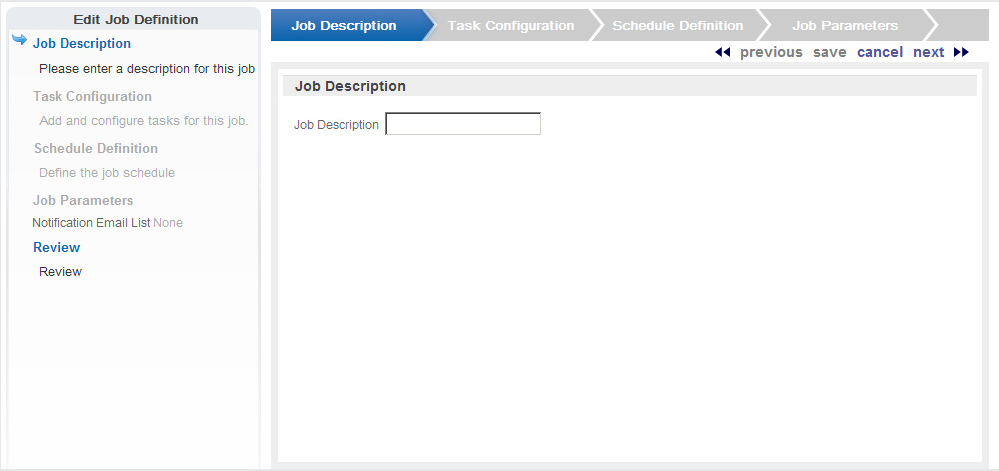


Figure 23-3: Create Job Wizard

2. In the **Job Description** field, enter a description of the Job.
3. When you have finished, click **next** to continue.

   The Task Configuration step opens.

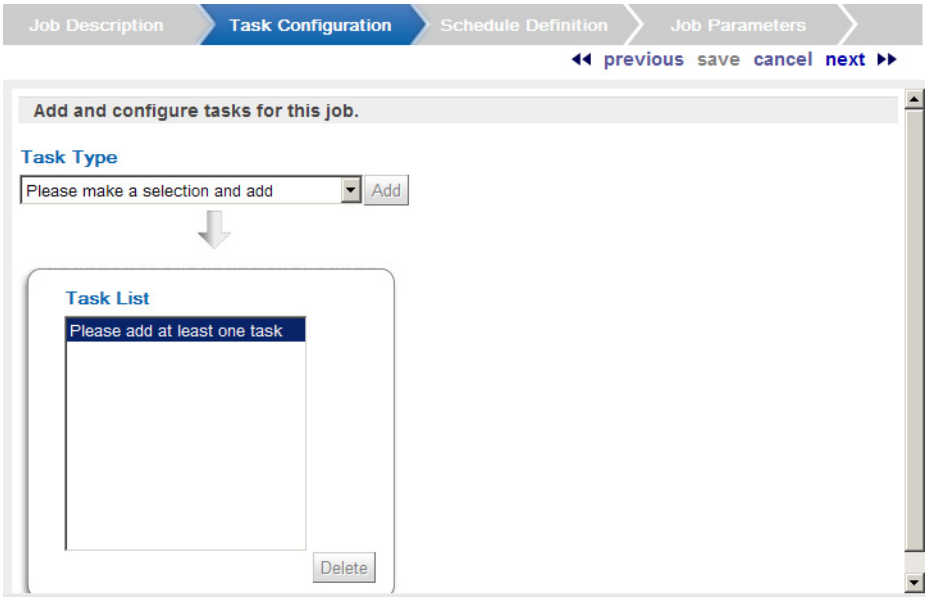


Figure 23-4: Task Configuration Step

4. Configure the Tasks in the Job:

   a. Select a Task in the Task Type Selection Menu. See "Jobs and Tasks" on page 623 for a description of each Task.

b. Click the **Add** button.

The Task is added to the Task List.

c. Configure the parameter(s) for the Task.

If necessary, click a Task in the Task List to select it for configuration.

The parameters that must be configured for a Task depends upon the Task selected. See "Configure Job Parameters" on page 629 for a description of the parameters to configure for each Task.

d. If necessary, delete a Task by doing the following:

1) Click the Task to delete in the Task List.

2) Click the **Delete** button.

The Task is deleted from the Task List.

5. When you have finished, click **next** to continue.

The Schedule Definition step opens.

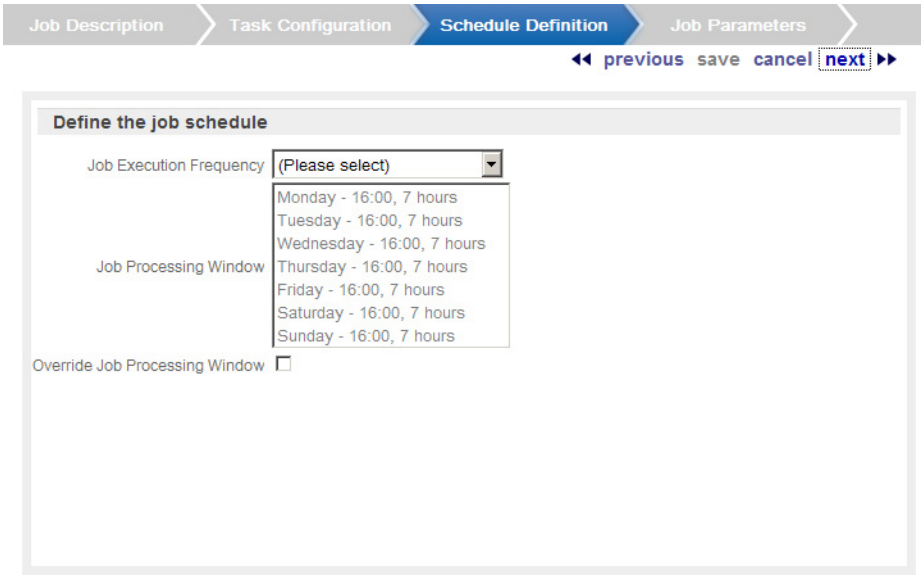


Figure 23-5: Schedule Definition Step

6. Define the Schedule on which the Job will run:

a. Select the Job Execution Frequency. This Selection Menu has the following options:

- **Once, Immediately** - Run the Job as soon as the Job has been completed. If you select this option, continue with step g.
- **Once, Later** - Run the Job at a later date.
- **Daily** - Run the Job every day.
- **Daily, Business Days Only** - Run the Job only on business days (i.e. Monday through Friday).
- **Weekly** - Run the Job once each week.
- **Monthly** - Run the Job once each month.

b. Use the **Start Date** Calendar Menu to select the start of the date range in which the Job will run.

If you selected a Job Execution Frequency of **Once, Later**, continue with step f.

c. Use the **End Date** Calendar Menu to select the end of the date range in which the Job will run.

- If you selected a Job Execution Frequency of **Daily**, or **Daily, Business Days Only**, continue with step f.
- If you selected a Job Execution Frequency of **Weekly**, continue with step d.
- If you selected a Job Execution Frequency of **Monthly**, continue with step e.

d. Use the **Day of Week** Selection Menu to select the day of the week on which the Job will run. Continue with step f.

e. Use the **Day of Month** Selection Menu to select the day of the month on which the Job will run.

f. Use the **Job Execution Time** Time Menus to determine the time at which the Job will run.



It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the Job to run.

g. Use the **Override Job Processing Window** Check Box to indicate whether the Job should run, even if it is scheduled outside the Job Processing Window.

7. When you have finished, click **next** to continue.

The Job Parameters step opens.

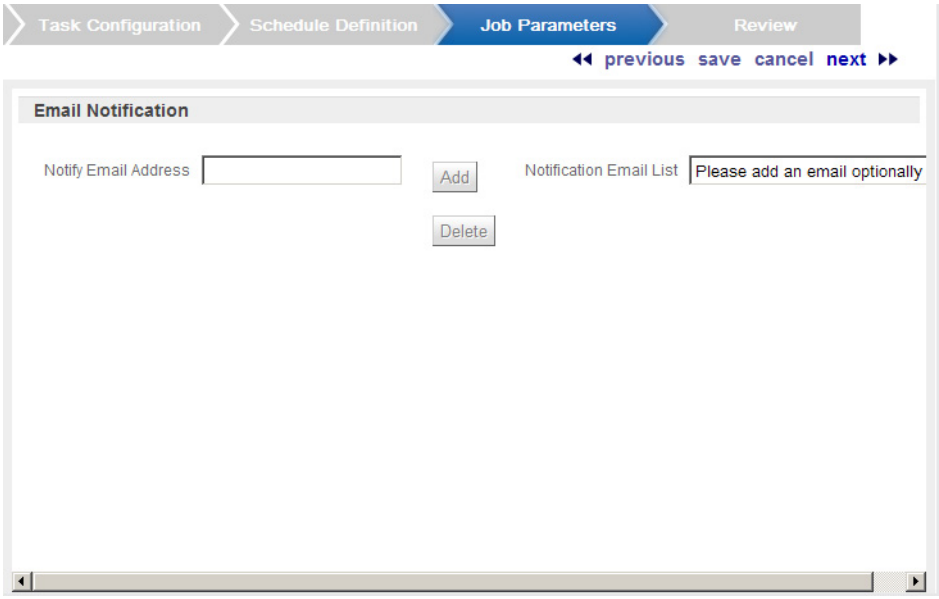


Figure 23-6: Job Parameters Step

8. Configure the Job Parameters:
   a. If necessary, enter an email address in the **Notify Email Address** field.
      Relate will send an email to this address following the completion of the Job.
   b. Click **Add**.
      The email address is added to the Notification Email List.
   c. Repeat steps a-b for each email address to be added to the Notification Email List.
   d. To remove an email address from the Notification Email List:
      1) Click the email address in the **Notification Email List** to select it.
      2) Click **Delete**.
         The email address is removed from the Notification Email List.
9. When you have finished, click **next** to continue.
   The Review step opens.
10. Review the entered information to ensure that it is correct.
    - ❑ Click **save** to save the Job with the current settings and return to the Scheduled Jobs List.
    - ❑ Use Wizard Navigation to return to an earlier step and make any necessary changes.
    - ❑ Click **cancel** to delete all information and return to the Scheduled Jobs List.

Job Processing Window

The Job Processing Window field displays the time(s) at which scheduled jobs should run. The Window is intended to indicate times when there will be little processing load on the system, so that Jobs will not interfere with transaction processing.



Figure 23-7: Job Processing Window

Each line in the Job Processing Window defines a portion of the Job Processing Window. These lines have the following format:

```
[Day of Week] - [Start Time], [Duration]
```

Where:

- `[Day of Week]` is a day of the week (e.g. Sunday).
- `[Start Time]` is the time at which the Window begins, in 24-hour clock time.
- `[Duration]` is the length of time that the Window is open.

Jobs and Tasks

Jobs include one or more tasks that are chained together to run sequentially.



Each Job has additional parameters that must be configured. For information about these parameters, see "Configure Job Parameters" on page 629.

The type of tasks that can be scheduled within a job are:

Customer Tasks

Location Mass Assignment

This task searches Customer transaction histories in a selected date range and assigns each Customer to a Home Location, based on where the Customer shopped most frequently over the chosen date range.

In the database, there are two location fields: Home Location and Sign-Up Location. The system expects to see the Sign-Up Location populated from the POS or other data entry client. This field is static.

The Home Location field is intended to be the location to which the Customer is assigned as their primary location. As an example; it is possible that a Customer signs up in a location during a trip. However, there is a location in the Customer's neighborhood and subsequent to sign up, the Customer is seen to shop there regularly. As a basic management function, the administrator wants to assign the Customer to this location.

As Customers move around and as a retailer opens and closes locations it is a common, on-going requirement to assign and re-assign Customers to a home location. The Location Mass Assignment task will re-assign Customers to the home location where they shopped most frequently during the selected date range.

Duplicate Search

This process allows you to schedule a search for duplicate Customer records. The search will identify potential duplicate Customer records by comparing information in each record and grouping them into Duplicate Sets.

Duplicate Merge

This task performs the process of actually merging duplicate Customer records identified by the Duplicate Search job.

The Merge process that runs on this schedule will merge all duplicate sets that are marked as "Approved", regardless of the search strategy used to find them. After the merge, Relate will clean out all duplicate sets (Approved, Not Approved, and Merged) from the database.

Duplicates can be approved through a Duplicate Search job using the Automatic Approval option (see "Duplicate Search" on page 631), or in the Customer Merge Review procedure.

Household Identification

The Household Identification task determines which Customers belong to the same household. This is useful when creating mailing lists, as this allows you to limit the number of mailings sent out to one per household.

Home Location Re-Assignment

The Home Location Re-Assignment task changes the Home Locations assigned to Customers.

Franchisee Assignment

The Franchisee Assignment task assigns Franchisees to Customers.

Export Segments to Promote

The Export Segments to Promote task exports segment information to Promote. *This report is only available if Enable Promote Integration is set to **Yes** in Conflate.*

See also: The Relate Configuration Guide for more information.

Reset Customer YTD Totals

Resets the YTD totals for all Customers to zero.

Associate Assignment Tasks

Automated Associate Assignment

This task automatically assigns Associates to Customers, based on a set of selected criteria.

Associate Mass Re-assignment

This task automatically reassigns the Customers assigned to a selected Associate to one or more new Associates.

Customer Segment Tasks

Unstratified Segment

This task finds Customers to be entered into an Unstratified Segment and counts the number of Customers in the Segment. For more information on Unstratified Segments, see "Unstratified Segments" on page 188.

Stratified Segment

This task organizes Customers into user-defined levels and counts the number of Customers in each strata level. For more information on Stratified Segments, see "Stratified Segments" on page 203.

Account Tasks

Export Card Series

This task creates an export file for Cards created using a SOAP Message or batch file.

When a Generate Card message is processed, individual Cards are created and, depending on configuration, assigned to Customers; however, the Card and Customer information is not exported to an XML file. This job will create an export file that includes the Relate-generated Card numbers and the Customer assigned to each Card.



The export file for this type of job is not compressed.

Release Expired PreAuth

This task releases (removes) expired pre-authorization amounts that have not been settled or post-authorized. It searches Tender Accounts for PreAuth amounts that are older than their configured expiration time and removes them from the associated Tender Account.

Notify Card Renewal

This task notifies Customers that they need to renew Cards that are set to expire within a certain, defined period of time.

Award Account Tasks

Issue Anniversary Awards

This task searches for Customers who have a birthday or signup date anniversary within the time frame specified and issues an eAward.

This process schedules the Issue Anniversary Awards process.

This task will look behind and ahead of the run date for Customers who have birthdays or signup anniversaries within the time period. The Customers that are found will receive an award coupon as created in this process. When this task is run, an export file (birthday or signup anniversary) is created.

Notify Awards Expire

This task searches for Customers whose awards are scheduled to expire within a defined time window, and creates an export file containing award expiration notification information for those Customers.

Loyalty Tasks

Distribute Loyalty Awards

This task creates an export file for all pending awards.

Create Loyalty Awards

This task converts loyalty points into awards, based on the parameters set for the program and program level.

Earn Loyalty Points

This task converts pending (escrow) loyalty points into earned loyalty points.

Expire Loyalty Points

This task expires (deletes) loyalty points based upon parameters in the Program/Level.

Reset Loyalty YTD Points

This task resets the YTD points earned by each Customer. This task should be run at the end of each calendar/fiscal year to reset YTD Points balances to zero. This task is used for reporting purposes only; it does not affect the actual loyalty points on an account. Life-to-date (LTD) points are not affected by this process.

Housekeeping Tasks

When a database contains large amounts of old data, database performance and response may be slowed. To prevent the overburdening of the database with old, unneeded information, housekeeping tasks can be performed to remove old information.

Delete Customers

The Delete Customers task removes old Customer records that are no longer needed.

Delete Inactive Customers

This task deletes old Customer records that are inactive.

Delete Transaction History

This task deletes old transaction information.

Delete Promotion

This task deletes old promotions.

Delete Merged/Archived Customers

This task deletes old Customer records that have been merged into other Customer records and archived.

Delete Loyalty Accounts and Activities

This task deletes old loyalty accounts and activities.

Delete Loyalty Inquiry Activities

This task deletes old loyalty inquiry activities.

Delete Segments

This task deletes old segments.

Delete Segment History

This task deletes old segment history information.

Delete Job History

This task deletes old job history information.

Delete Gift Registries

This task deletes all database information for Gift Registries that expired prior to a certain, defined period of time in the past.

Delete Inactive Gift Registries

This task deletes all database information for inactive Gift Registries that have not been updated within a certain, defined period of time.

Delete Social Activities

This task deletes all social activities from the database that were posted before a certain number of days in the past.

Delete Award Inquiry Activities

This task deletes old award inquiry activities.

OLAP Tasks

Aggregate Loyalty Facts

As part of Online Analytical Processing (OLAP), information about the loyalty program must be aggregated into a summary that can then be retrieved. This task aggregates loyalty information into a summary that can be used by OLAP processes.

Aggregate Tender Facts

As part of Online Analytical Processing (OLAP), information about Tender Accounts must be aggregated into a summary that can then be retrieved. This task aggregates Tender Account information into a summary that can be used by OLAP processes.

Campaign Tasks

Dynamic Promotions

This task updates the Targets for all dynamic Promotions.

Update Promotion Email Statistics

This task updates the email statistics for message Promotions.

Social Network Integration Tasks

Social Network Listener

This task searches social networks for Customer posts that meet search criteria defined by Social Listeners.

Social Network Update

This task checks for new Social Profiles to add to Customer records.

Clienteling

Task Generator

Generate tasks for Segments with Task Generation enabled. See Chapter 6, “Segments” on page 187.

Configure Job Parameters

The parameters that must be configured for a given task depend upon the task being defined



For a description of processes performed by these Jobs, see "Jobs and Tasks" on page 623.

The following sections describe the fields that configure each task:

Customer Tasks

- "Location Mass Assignment" on page 630
- "Duplicate Search" on page 631
- "Duplicate Merge" on page 632
- "Household Identification" on page 634
- "Home Location Re-Assignment" on page 635
- "Franchisee Assignment" on page 636
-
- "Reset Customer YTD Totals" on page 638

Associate Assignment Tasks

- "Automated Associate Assignment" on page 639
- "Associate Mass Re-assignment" on page 640

Customer Segment Tasks

- "Unstratified Segment" on page 642
- "Stratified Segment" on page 643

Account Tasks

- "Export Card Series" on page 643
- "Release Expired PreAuth" on page 644
- "Notify Card Renewal" on page 644

Award Account Tasks

- "Issue Anniversary Awards" on page 645
- "Notify Awards Expire" on page 646

OLAP Tasks

- "Aggregate Loyalty Facts" on page 664
- "Aggregate Tender Facts" on page 665

Loyalty Tasks

- "Distribute Loyalty Awards" on page 647
- "Create Loyalty Awards" on page 648
- "Earn Loyalty Points" on page 649
- "Expire Loyalty Points" on page 649
- "Reset Loyalty YTD Points" on page 650

Housekeeping Tasks

- "Delete Customers" on page 650
- "Delete Inactive Customers" on page 651
- "Delete Transaction History" on page 652
- "Delete Promotion" on page 653
- "Delete Merged/Archived Customers" on page 654
- "Delete Loyalty Accounts and Activities" on page 655
- "Delete Loyalty Inquiry Activities" on page 656
- "Delete Segments" on page 657
- "Delete Segment History" on page 658
- "Delete Job History" on page 659
- "Delete Gift Registries" on page 660

Housekeeping Tasks (cont'd)

- "Delete Inactive Gift Registries" on page 661
- "Delete Social Activity" on page 662
- "Delete Award Inquiry Activities" on page 663

Campaign

- "Dynamic Promotions" on page 666
- "Update Promotion Email Statistics" on page 667

Social Network Integration

- "Social Network Listener" on page 667
- "Social Network Update" on page 668

Clienteling

- "Task Generator" on page 669

Location Mass Assignment

This Task has the following parameters:

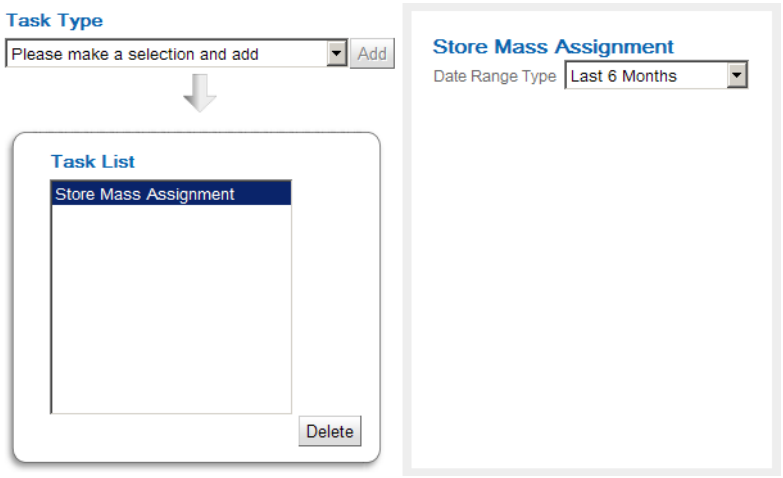


Figure 23-8: Location Mass Assignment Parameters

- **Date Range Type** - This Selection Menu determines the Date Range used.
- **Start Date** - This Calendar Menu determines the first date of the Date Range (only available if Date Range Type is set to **Specific Date Range**).
- **End Date** - This Calendar Menu determines the final date of the Date Range (only available if Date Range Type is set to **Specific Date Range**).

Duplicate Search

This Task has the following parameters:

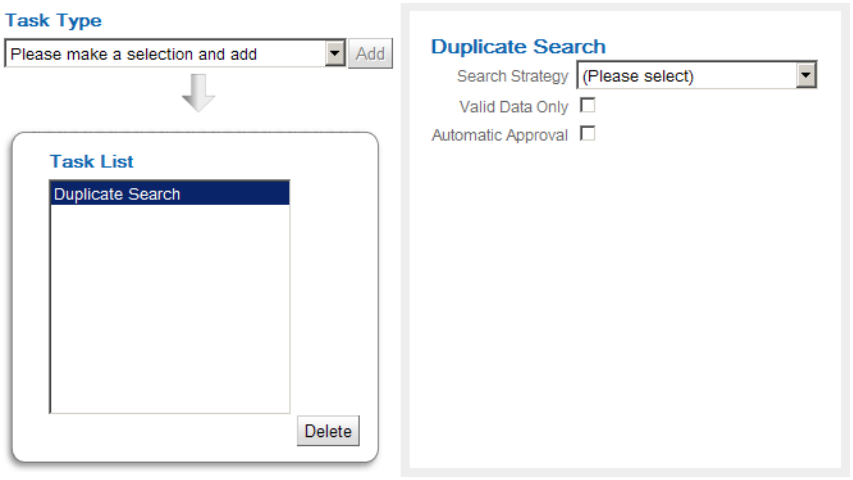


Figure 23-9: Duplicate Search Parameters

- **Search Strategy** - This Selection Menu determines the strategy used to search for duplicate Customers. See "Search Strategy Field Comparisons" on page 631 for a description of search strategies.
- **Valid Data Only** - This Check Box determines whether the search strategy will only look at addresses, phone number, and/or email addresses that have been validated (see "Customer Validation" on page 159 for more information). If the Check Box is unchecked, Relate will look at all addresses, phone number, and email addresses.
- **Automatic Approval** - This Check Box determines whether the Duplicate Sets found by the search process will be automatically approved for merging on the next scheduled merge.

Search Strategy Field Comparisons

The following table shows which fields are compared for the search strategy selected.

Field	Search Strategy			
	Name Address	**Name Phone**	**Name Email**	**Name Address Phone Email**
First Name	X	X	X	X
Middle Name	X	X	X	X
Second First Name	X	X	X	X
Second Last Name	X	X	X	X
Last Name	X	X	X	X

Field	Search Strategy			
	Name Address	Name Phone	Name Email	Name Address Phone Email
Suffix	X	X	X	X
Address 1	X			X
Address 2	X			X
City	X			X
State	X			X
Postal Code	X			X
Area Code		X		X
Phone Number		X		X
Email Address			X	X

Duplicate Merge

This Task has the following parameter:

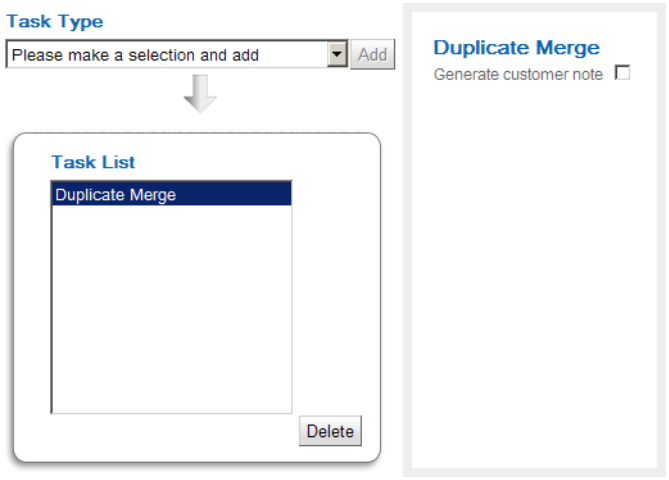


Figure 23-10: Duplicate Merge Parameters

- **Generate customer note** - This Check Box determines whether a Customer note will be generated when duplicate Customers are merged.

Merge Behavior



The merge behavior described in this section can be overridden through the use of configuration settings. Contact your Project Manager for more information.

When a duplicate set is merged, there are certain checks that are made on each Customer record in the set and specific actions taken based on the results of that check. These duplicate checks are configured through Conflate.

See also: *Relate™ Configuration Guide* for more information about configuring duplicate checks.

Merge Records Logic

This section describes the new Customer record that results from the merge process. The following table lists information categories and where the information for the new record comes from.

Category	Comes From ...
Customer ID	New
Home Location	Source
Personal Preferences	Source
Name	Source
Address(es)	Source
Email Address(es)	Source
Telephone Number(s)	Source
Personal Summary	Source
Socioeconomic Profile	Source
Alternate IDs	All Duplicate records
Customer Attributes	All Duplicate records
Transactions	All Duplicate records
Effective Date	Minimum of all Duplicate Records
Expiry Date	Maximum of all Duplicate Records
Create Date	Minimum of all Duplicate Records
First Transaction Date	Minimum of all Duplicate Records
Last Transaction Date	Maximum of all Duplicate Records

Category	Comes From ...
Total Values	Sum of all Duplicate Records
YTD Values	Sum of all Duplicate Records
Signup Date/Location	1) Minimum of duplicate records that have both or 2) source if has both or 3) minimum date of duplicate records and any location.
Birthday	Source or any if source is empty.
Update Date	Current Date
Card Associations	All Cards associated with new Customer ID.

Household Identification

This Task has the following parameters:

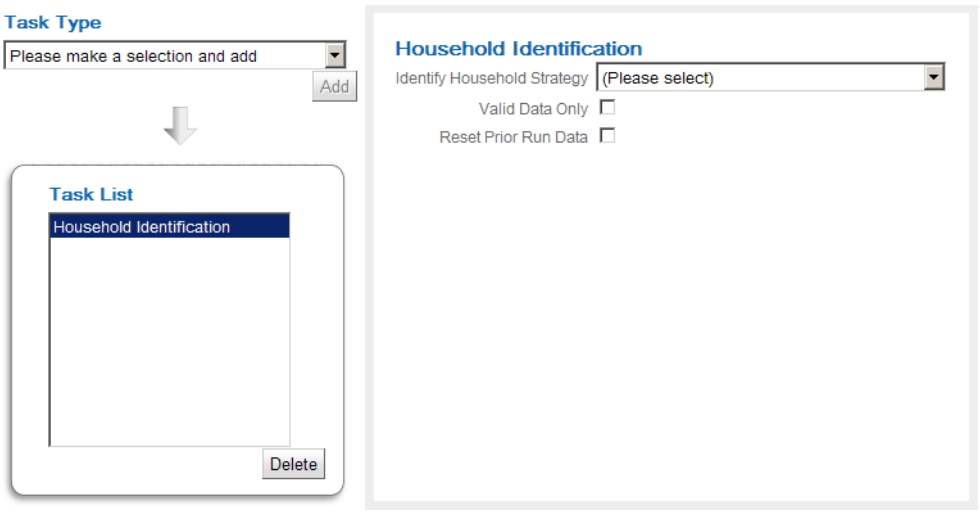


Figure 23-11: Household Identification Parameters

- **Identify Household Strategy** - This Selection Menu determines the search method used to organize Customers into Households.
  - **PRIMARY HOME ADDRESS** - Customers with the same primary home address will be organized into a Household.
  - **LAST NAME PRIMARY HOME ADDRESS** - Customers with both the same last name and the same primary home address will be organized into a Household.
- **Valid Data Only** - This Check Box determines whether the search strategy will only look at addresses and names that have been validated (see "Customer Validation" on page 159 for more information). If the Check Box is unchecked, Relate will look at all addresses and names.

- **Reset Prior Run Data** - This Check Box determines how existing Households will be treated by the Task.
  - **Checked (☑)** - Existing Households will be ignored and the Households will be created anew each time the Task runs.
  - **Unchecked (☐)** - **[DEFAULT]** Existing Households will be kept in place.

Home Location Re-Assignment

This task has the following parameters:

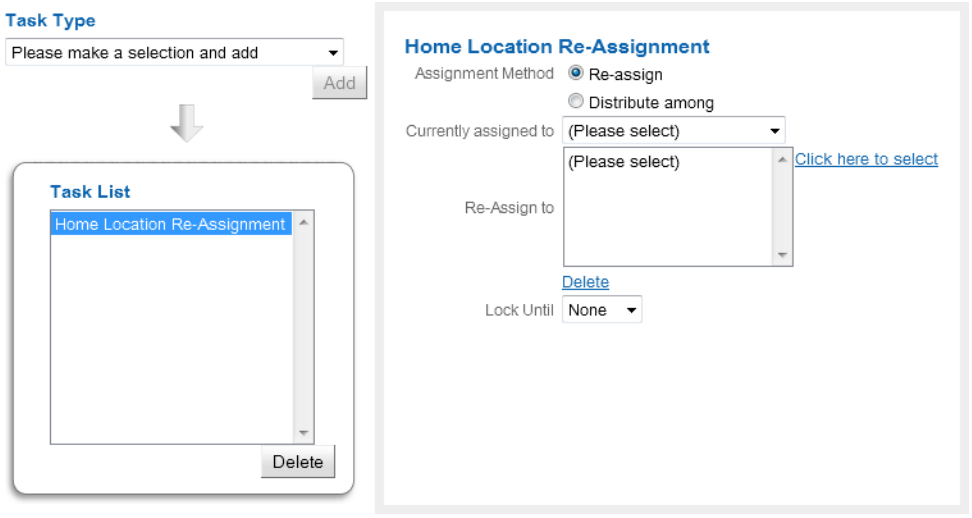


Figure 23-12: Home Location Re-Assignment Parameters

- **Assignment Method** - These Radio Buttons determine how Customers are assigned to Locations.
  - **Re-assign** - **[DEFAULT]** Check all Customers for reassignment.
  - **Distribute among** - Assign Customers from one Home Location among a set of Locations.
- **Currently Assigned To** - This Selection Menu determines which Location's Customers will be reassigned. *This field is only shown when* **Distribute among** *is selected in the Assignment Method Radio Buttons.*
- **Re-Assign to** - The area displays the set of Locations among which the Customers will be reassigned. *This field is only shown when* **Distribute among** *is selected in the Assignment Method Radio Buttons.*
  - To add a Location:
    1) Click the **Click here to select** Link.

A Search Home Location Window opens.



Figure 23-13: Search Home Location Window

2) Select the **Location** in the Selection Menu.

3) Click the **OK** button.

The Search Home Location Window closes and the Location is added to the **Re-Assign to** area.

- To delete a Location:

1) Click to select the Location in the **Re-Assign to** area.

2) Click the **Delete** Link.

The Location is removed.

- **Lock Until** - After a Customer is assigned to a Home Location by this task, that Customer cannot be assigned to a new Home Location during the period of time determined by this Selection Menu.

Franchisee Assignment

This task has the following parameters:

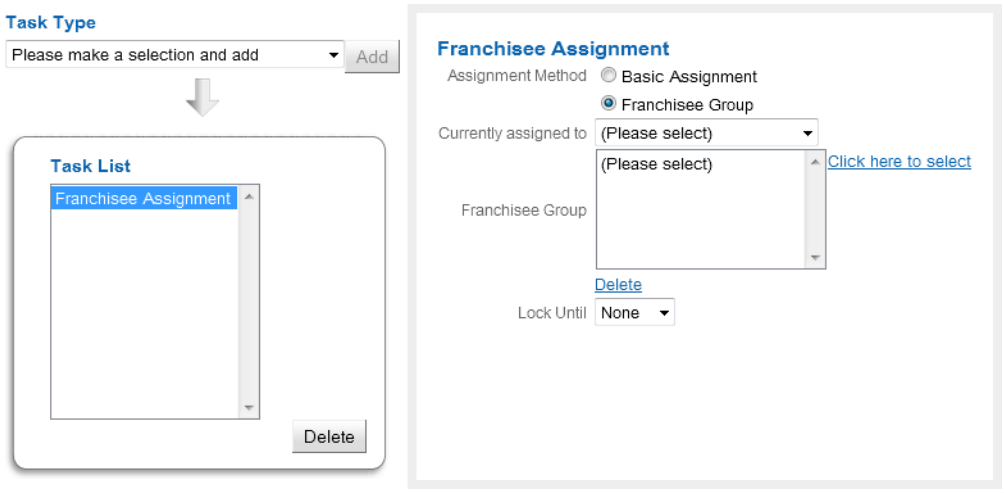


Figure 23-14: Franchisee Assignment Parameters

- **Assignment Method** - These Radio Buttons determine how Customers are assigned to Franchisees.
  - **Basic Assignment** - **[DEFAULT]** Check whether the Franchisee Assignment for each Customer record needs to be changed.

- ❑ **Franchisee Group** - Assign Customers from one Franchisee among a set of Franchisees.

- **Currently Assigned To** - This Selection Menu determines which Franchisee's Customers will be reassigned. *This field is only shown when* **Franchisee Group** *is selected in the Assignment Method Radio Buttons.*
- **Franchisee Group** - The area displays the set of Franchisees among which the Customers will be reassigned. *This field is only shown when* **Franchisee Group** *is selected in the Assignment Method Radio Buttons.*

  ❑ To add a Franchisee:

  1) Click the **Click here to select** Link.

  A Search Franchisee(s) Window opens.

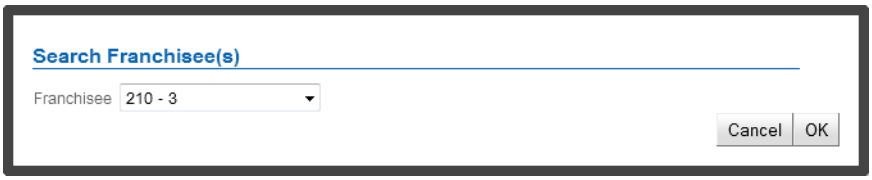


Figure 23-15: Search Franchisee(s) Window

  2) Select the **Franchisee** in Selection Menu.

  3) Click the **OK** button.

  The Search Franchisee(s) Window closes and the Franchisee is added to the **Franchisee Group** area.

  ❑ To delete a Franchisee:

  1) Click to select the Franchisee in the **Franchisee Group** area.

  2) Click the **Delete** Link.

  The Franchisee is removed.

- **Lock Until** - After a Customer is assigned to a Franchisee by this task, that Customer cannot be assigned to a new Franchisee during the period of time determined by this Selection Menu.

Export Segments to Promote

This task has no additional parameters.

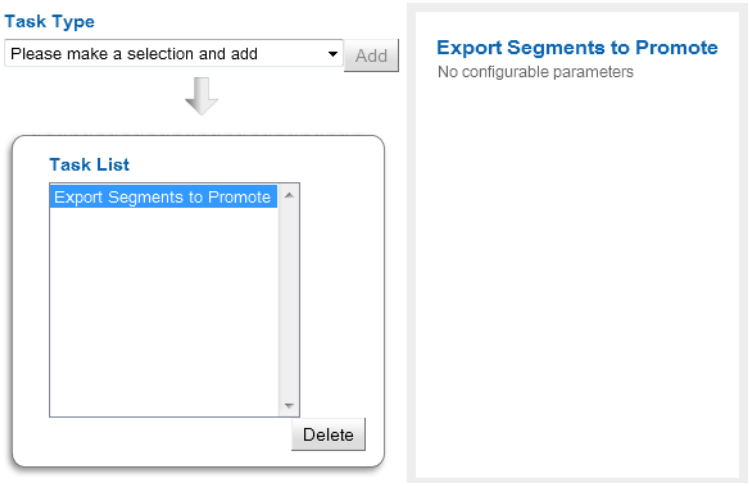


Figure 23-16: Export Segments to Promote Parameters

Reset Customer YTD Totals

This task has the following parameters:

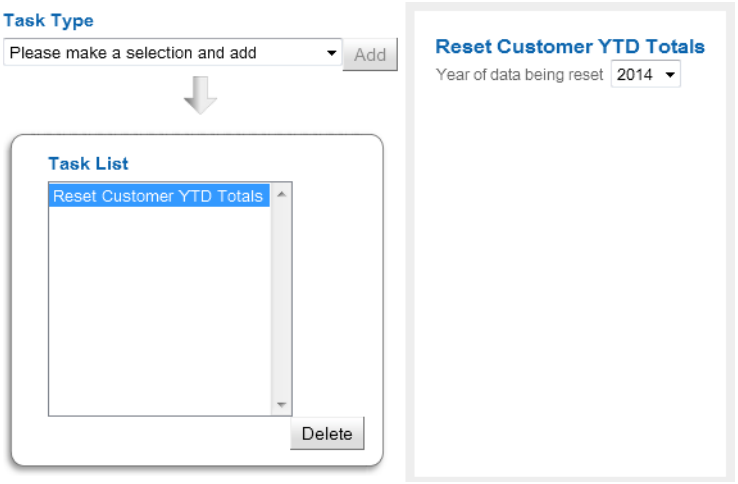


Figure 23-17: Reset Customer YTD Totals Parameters

- **Year of data being reset** - This Selection Menu determines the year for which the YTD data will be reset.

Automated Associate Assignment

This task has the following parameters:

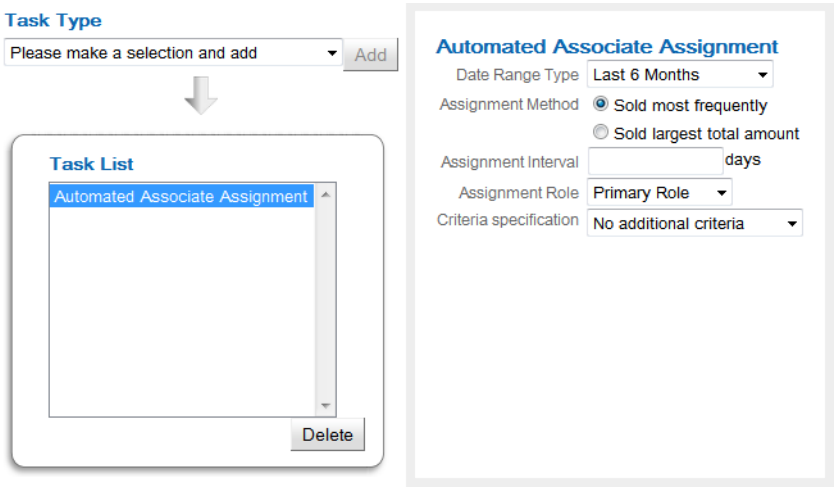


Figure 23-18: Automated Associate Assignment Parameters

- **Date Range Type** - This Selection Menu determines the Date Range used.
- **Start Date** - This Calendar Menu determines the first date of the Date Range (only available if Date Range Type is set to **Specific Date Range**).
- **End Date** - This Calendar Menu determines the final date of the Date Range (only available if Date Range Type is set to **Specific Date Range**).
- **Assignment Method** - These Radio Buttons determine the selection method used to assign an Associate to a Customer. These Radio Buttons have the following options:
  - **Sold most frequently** - The Associate who performed the most sales to each Customer.
  - **Sold largest total amount** - The Associate who sold the largest total amount to each Customer.
- **Assignment Interval** - Number of days between Associate reassignments for a Customer. After the Job assigns an Associate to a Customer, this is the number of days the Job will wait before changing that assignment.
- **Assignment Role** - This Selection Menu determines the Associate Role used for the Associate assignment.
- **Criteria specification** - Additional criteria to use when assigning the Associate. This Selection Menu has the following options:
  - **No additional criteria** - This Job will not require any additional criteria.

- **Select criteria from list** - Add Item or Location criteria to the Job. A transaction must match one of the entered criteria to be used in determining the Associate to be assigned to the Customer.

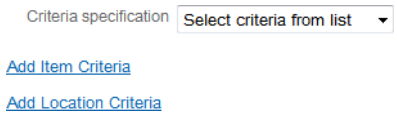


Figure 23-19: Select Criteria from List

  - Click **Add Item Criteria** to use an Item Eligibility rule in the Job. See "Add Item Eligibility Rule (Simple)" on page 55 for more information.
  - Click **Add Location Criteria** to use a Location Eligibility rule in the Job. See "Add Location Eligibility Rule" on page 49 for more information.

Associate Mass Re-assignment

This task has the following parameters:

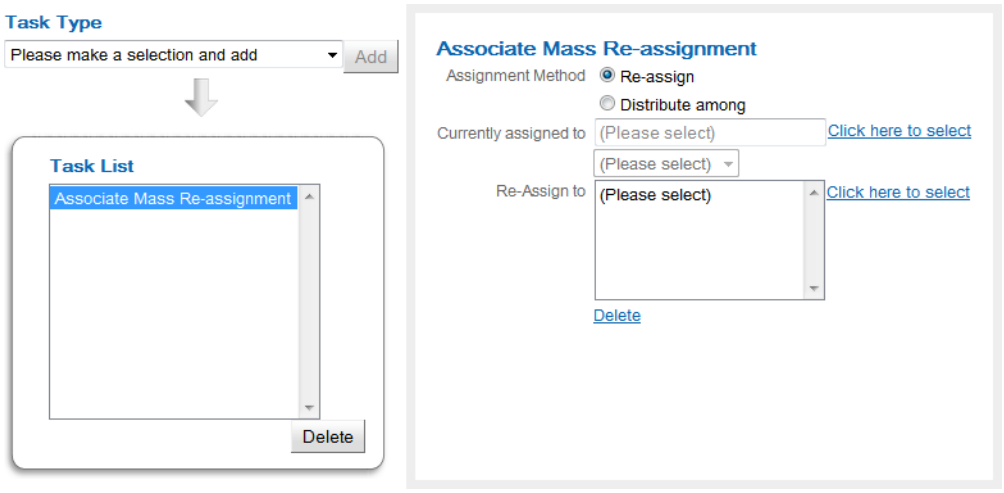


Figure 23-20: Associate Mass Re-assignment

- **Assignment Method** - Method used for reassigning the Customers. These Radio Buttons have the following options:
  - **Re-assign** - Assign all Customers to one Associate.
  - **Distribute among** - Distribute Customers among all Associates at the current Associate's location.
- **Currently assigned to** - Displays the Associate who is having their Customers reassigned. Perform a Change/Add Associate procedures to change the Associate.
- Selection Menu for the Associate Role that will be used for the new Associates.

- **Re-Assign to** - Displays the User ID(s) of the Associate(s) to whom the Customers will be reassigned. Perform a Change/Add Associate procedures to add an Associate to the field. *Only displayed if the Assignment Method is set to* **Re-assign**.

Associate reassignment selections have the following rules:

- This field is only displayed when **Re-assign** is selected as the **Assignment Method**.
- The Associates must all belong to the same Location.
- If a new Associate does not belong to the same Location as previously selected Associates, the previously selected Associates will be removed and the new Associate will be entered.
- If the Associate selected does not belong to the Location to which the currently assigned Associate, a confirmation response is displayed.



Figure 23-21: Change Destination Location Confirmation Prompt

Change/Add Associate

To change or add an Associate:

1. Click the **Click here to select** Link.

   A Search Associate Window opens.

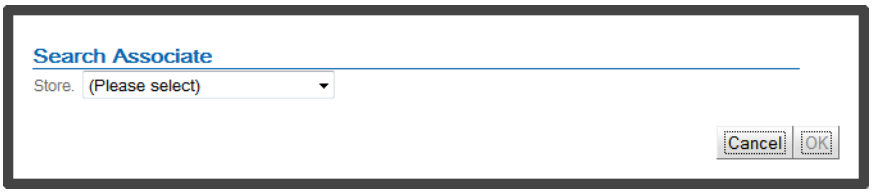


Figure 23-22: Search Associate Window

2. Use the **Location** Selection Menu to select the Location where the new Associate is located.

A List is populated with Associates for the location.

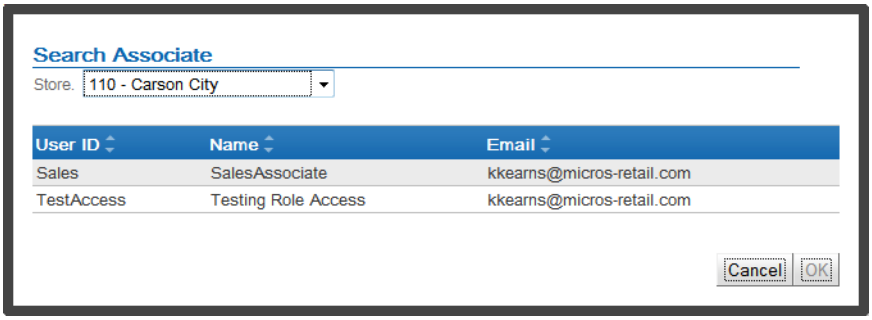


Figure 23-23: Search Associate Window - Location Selected

The following information is displayed for each Associate:

- **User ID** - ID of the User.
- **Name** - Name of the User.
- **Email** - Email address for the User.

3. Click to select the User to assign as an Associate for the Customer.
4. Click **OK** to save the changes, or click **Cancel** to exit the Window without saving.

   The Search Associate Window closes and Relate returns to the Task Configuration step.

Unstratified Segment

This Task has the following parameter:

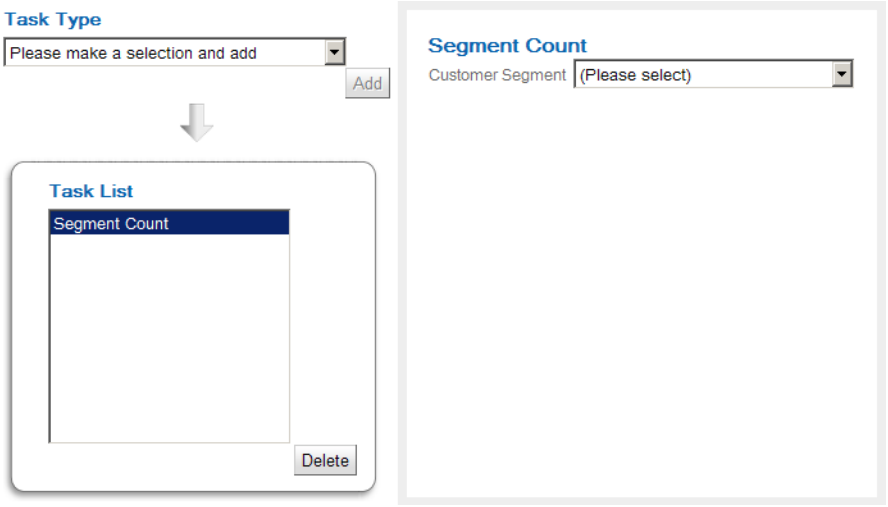


Figure 23-24: Unstratified Segment Parameters

- **Customer Segment** - This Selection Menu determines the Unstratified Segment that will be counted.

Stratified Segment

This Task has the following parameter:

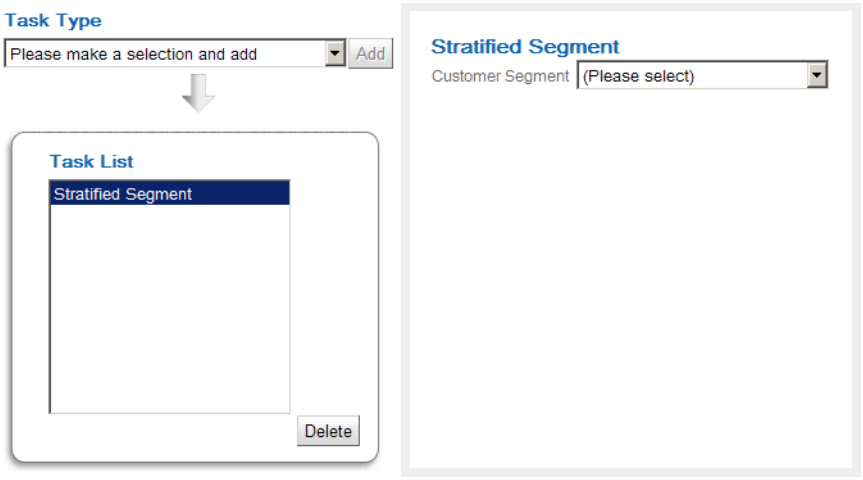


Figure 23-25: Stratified Segment Parameters

- **Customer Segment** - This Selection Menu determines the Stratified Segment that will be organized and counted.

Export Card Series

This Task has the following parameters:

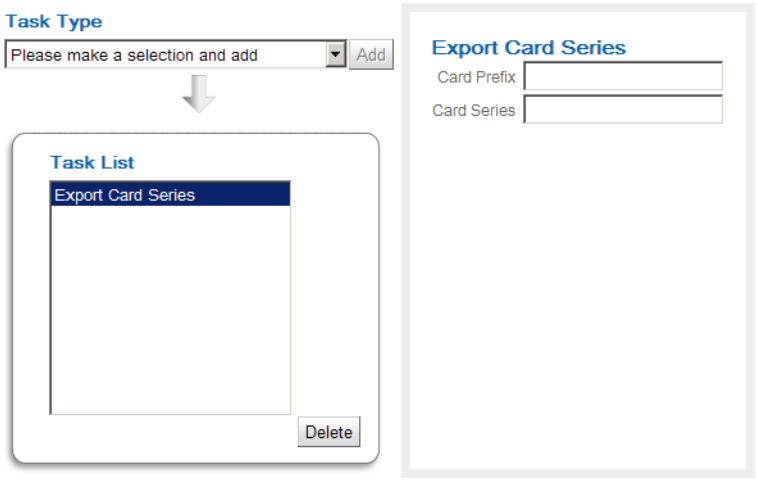


Figure 23-26: Export Card Series Parameters

- **Card Prefix** - This Text Field indicates the Card Prefix of the Card Definition to be exported.
- **Card Series** - This Text Field indicates the Card Series of the Card Definition to be exported.

Release Expired PreAuth

This Task has no additional parameters.

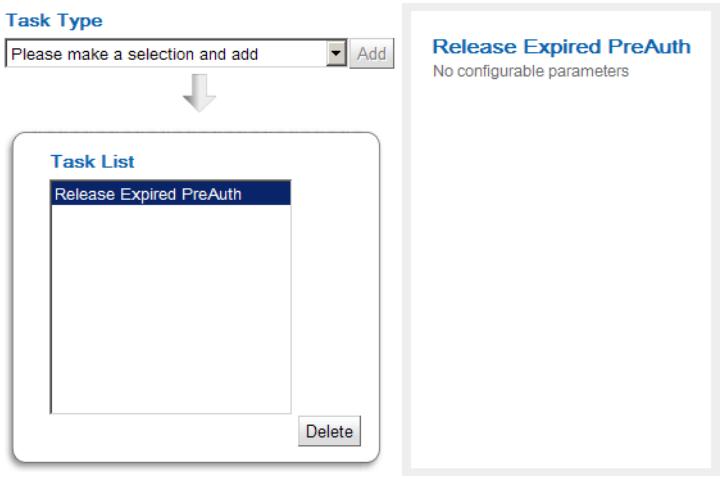


Figure 23-27: Release Expired PreAuth Parameters

Notify Card Renewal

This Task has the following parameters:

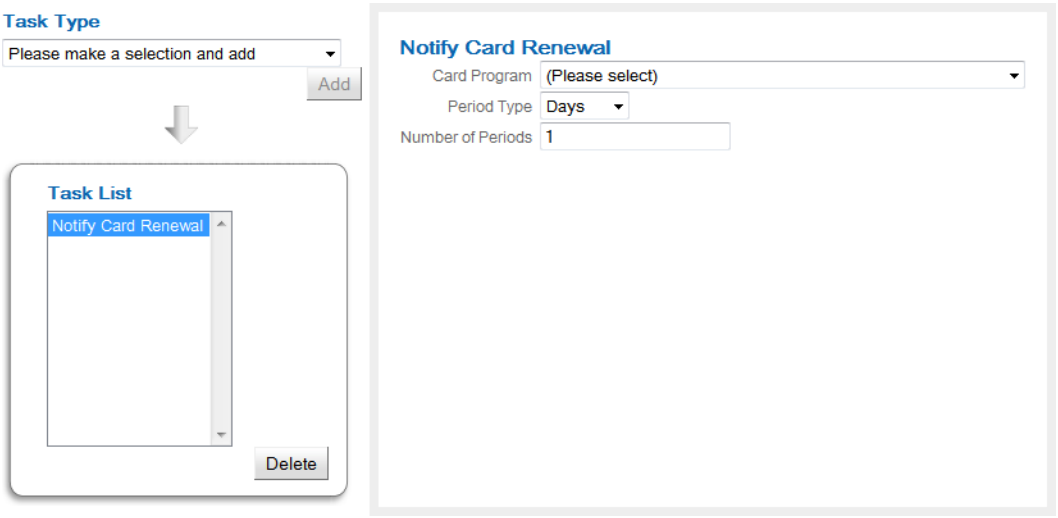


Figure 23-28: Notify Card Renewal Parameters

- **Card Program** - This Selection Menu determines the Card Program for which to notify Customers.
- **Period Type** - This Selection Menu determines the type of time period used to determine the notification time frame.
- **Number of Periods** - This Text Field defines the number of periods (from Period Type) before the Card expiration date that a Customer will be notified of their Card's coming expiration.

Issue Anniversary Awards

This Task has the following parameters:

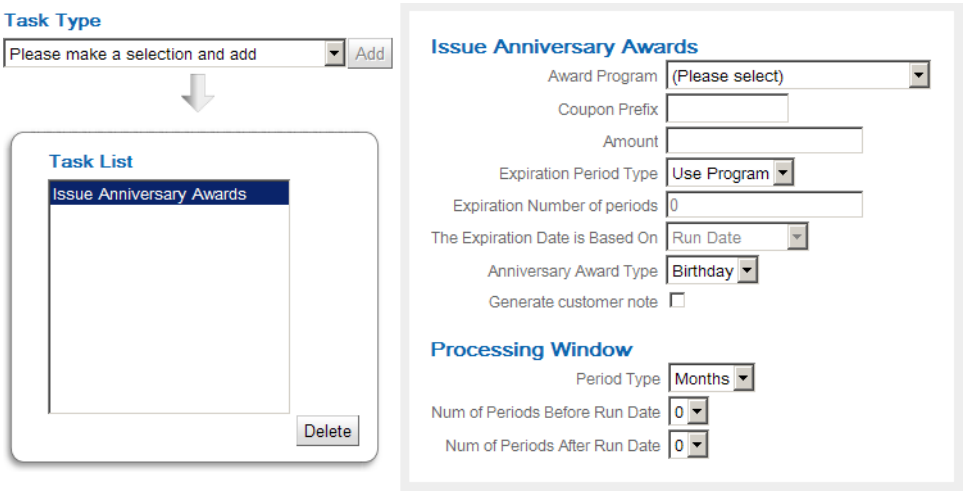


Figure 23-29: Issue Anniversary Awards Parameters

- **Award Program** - This Selection Menu determines the Award Program to use for the Anniversary Awards.
- **Coupon Prefix** - This Text Field indicates the Coupon Prefix for the Coupons generated.
- **Amount** - This Text Field defines the amount for the Coupons generated.
- **Expiration Period Type** - This Selection Menu indicates the type of period used in determining when the Coupons will expire.
- **Expiration Number of periods** - This Selection Menu determines the number of periods (from Expiration Period Type) that will pass before the Coupons expire (not displayed if Expiration Period Type is set to Use Program).
- **The Expiration Date is Based On** - This Selection Menu determines how the Coupon expiration dates are determined. This Selection Menu has the following options:
  - **Run Date** - The Coupon expiration dates are calculated from the date the Task runs.
  - **Customer Date** - The Coupon expiration dates are calculated from the anniversary date.
- **Anniversary Award Type** - This Selection Menu determines the type of anniversary for which Awards will be issued.
  - **Birthday** - Customer birthday.
  - **Signup** - Customer signup.
- **Generate customer note** - This Check Box determines whether a Customer note will be generated when a Coupon is generated for a Customer.
- **Period Type** - This Selection Menu indicates the type of period used in determining the window of dates for which Awards will be issued.
- **Num of Periods Before Run Date** - This Text Field defines the number of periods (from Period Type) before the run date for which Awards will be issued.

- **Num of Periods After Run Date** - This Text Field defines the number of periods (from Period Type) after the run date for which Awards will be issued.

Export File

The export file for either a birthday or signup anniversary contains the following information:

- Award Account information including account number, Card number, and Card serial number.
- Customer information including name, address, email, phone, and anniversary date.
- Award information including the amount of coupon, coupon number, and the coupon expiration date.

See also: The *Relate Configuration Guide* for more information on export templates.

Notify Awards Expire

This Task has the following parameters:

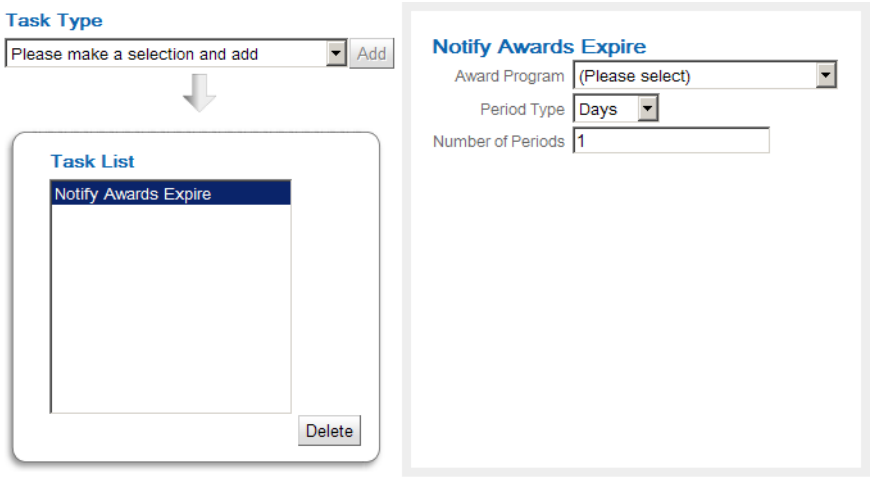


Figure 23-30: Notify Awards Expire Parameters

- **Award Program** - This Selection Menu determines the Award Program for which notifications will be sent.
- **Period Type** - This Selection Menu indicates the type of period used for determining the award expiration notification window.
- **Number of Periods** - Defines the number of periods (from Period Type) of the notification window.

Distribute Loyalty Awards

This Task has the following parameter:

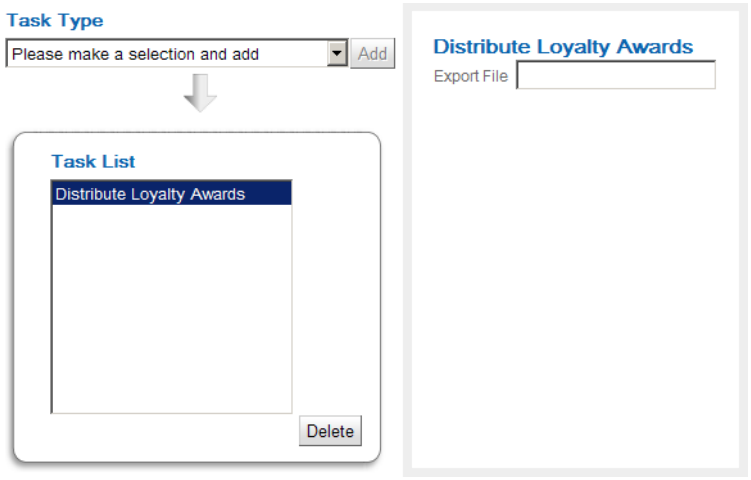


Figure 23-31: Distribute Loyalty Awards Parameters

The Create Loyalty Awards process should be run before this process.

- **Export File** - This Text Field defines the name of the export file created by the Task.

Export File

The export file contains information about the Award issued, the Account through which the Award was earned, and the Customer to whom the Award is being issued.

See also: The *Relate Configuration Guide* for more information on export templates.

Create Loyalty Awards

This Task has the following parameters:

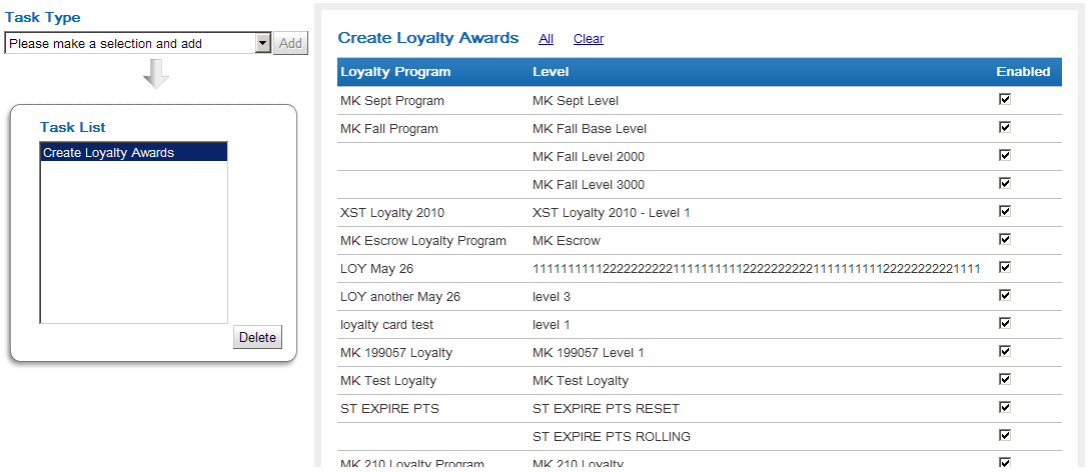


Figure 23-32: Create Loyalty Awards Parameters

- Each Check Box in the List indicates whether the associated Loyalty Program or Program Level is included in the Task:
  - To select all programs and all levels **[DEFAULT]**, click the **All** Link.
  - To deselect all programs and all levels, click the **Clear** Link.
  - To select or deselect individual program levels, click the **Enabled** Check Box for the level. If there is a check mark in the box (☑), the level will be included in the task.
- **Generate customer note** - This Check Box indicates whether a Customer note is generated when a Loyalty Award is generated for a Customer.

Export Files

When the award(s) are exported, two files are created, an E-Award Export File and a Loyalty Level Movement Export File.

See also: The *Relate Configuration Guide* for more information on export templates.

Earn Loyalty Points

This Task has no additional parameters.

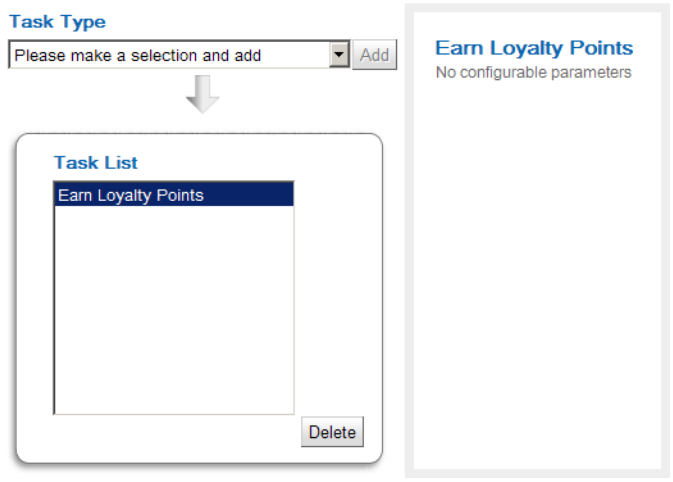


Figure 23-33: Earn Loyalty Points Parameters

Expire Loyalty Points

This Task has no additional parameters.

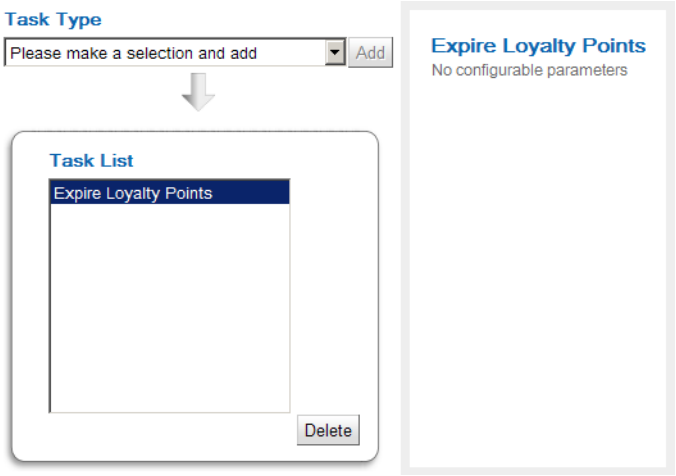


Figure 23-34: Expire Loyalty Points Parameters

Reset Loyalty YTD Points

This Task has no additional parameters.

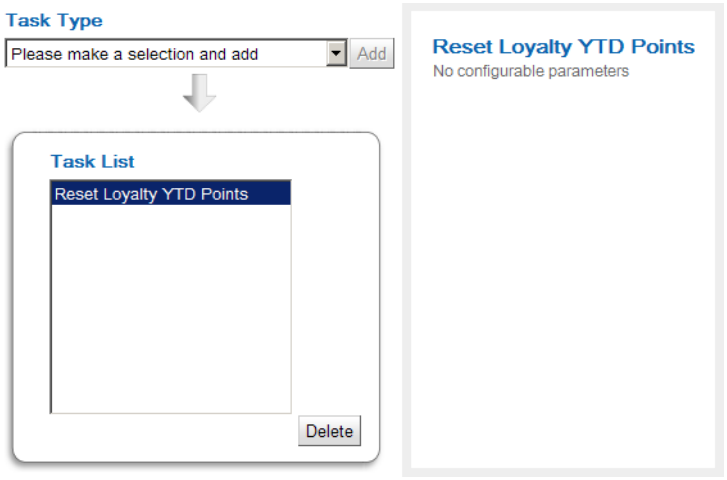


Figure 23-35: Reset Loyalty YTD Points Parameters

Delete Customers

This Task has the following parameters:

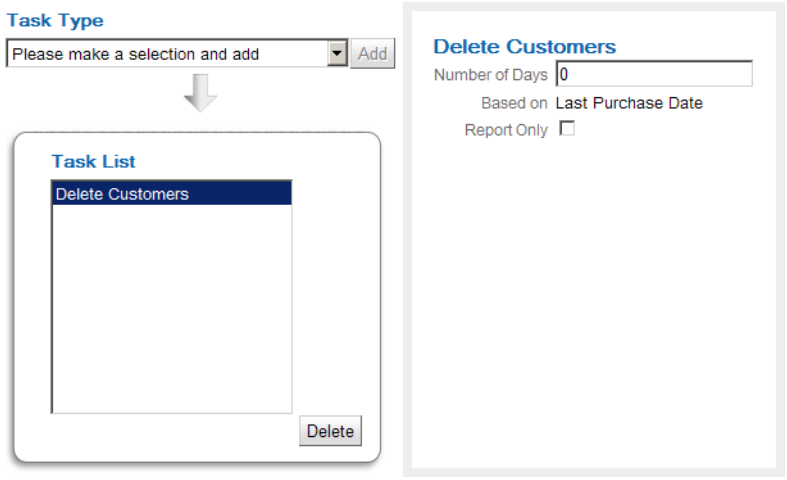


Figure 23-36: Delete Customers Parameters

- **Number of Days** - This Text Field defines the number of days after a Customer's Last Purchase Date on which a Customer will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Customers that would be deleted, or if the Customers will be deleted.
  - **Checked (☑)** - Only a count of the Customers will be reported.
  - **Unchecked (☐)** - The Customers will be deleted.

Delete Inactive Customers

This Task has the following parameters:

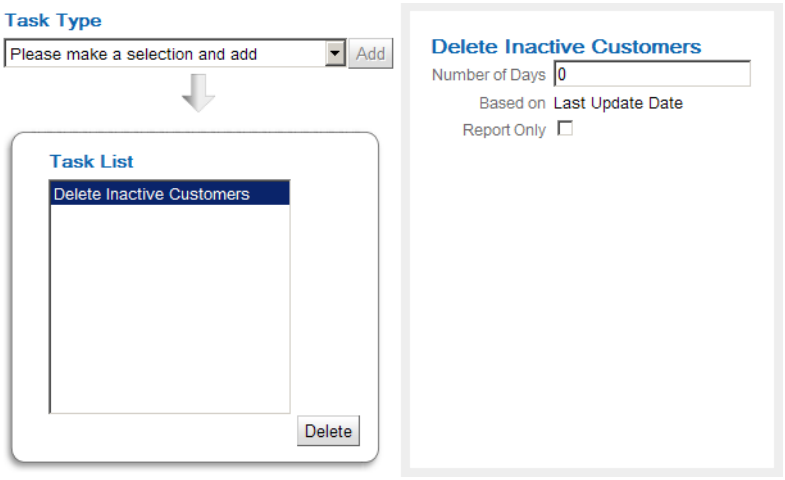


Figure 23-37: Delete Inactive Customers Parameters

- **Number of Days** - This Text Field defines the number of days after a Customer's Last Update Date on which a Customer will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Customers that would be deleted, or if the Customers will be deleted.
  - **Checked (☑)** - Only a count of the Customers will be reported.
  - **Unchecked (☐)** - The Customers will be deleted.

Delete Transaction History

This Task has the following parameters:

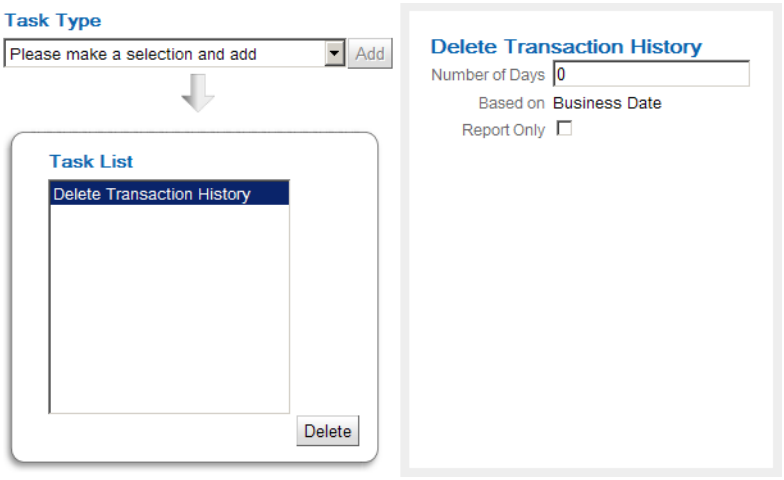


Figure 23-38: Delete Transaction History Parameters

- **Number of Days** - This Text Field defines the number of days after a Transaction Business Date on which a Transaction will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Transactions that would be deleted, or if the Transactions will be deleted.
  - **Checked (☑)** - Only a count of the Transactions will be reported.
  - **Unchecked (☐)** - The Transactions will be deleted.

Delete Promotion

This Task has the following parameters:

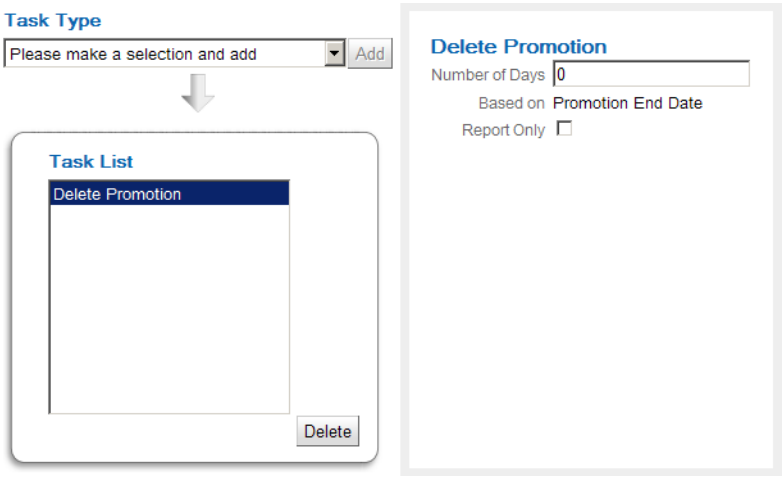


Figure 23-39: Delete Promotion Parameters

- **Number of Days** - This Text Field defines the number of days after a Promotion's End Date on which a Promotion will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Promotions that would be deleted, or if the Promotions will be deleted.
  - **Checked (☑)** - Only a count of the Promotions will be reported.
  - **Unchecked (☐)** - The Promotions will be deleted.

Delete Merged/Archived Customers

This Task has the following parameters:

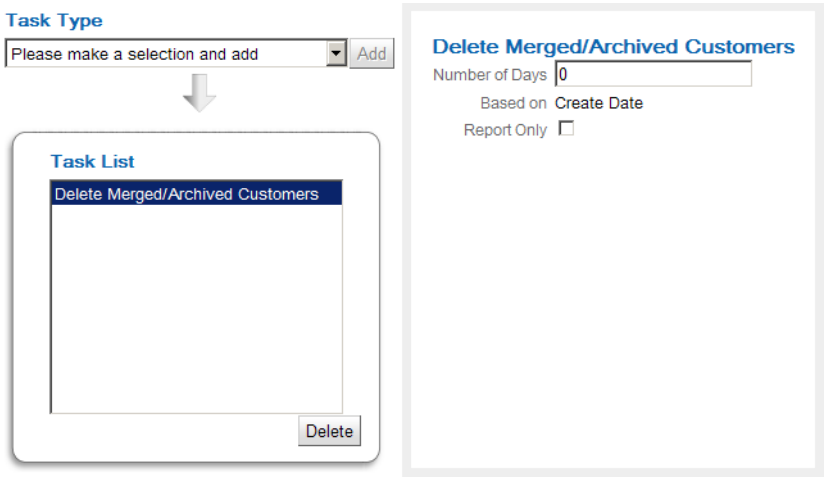


Figure 23-40: Delete Merged/Archived Customers Parameters

- **Number of Days** - This Text Field defines the number of days after a merged Customer record's Create Date on which the merged Customer records will be deleted. Any Customer record that was merged and archived before that date will be removed from the system
- **Report Only** - This Check Box indicates whether the Task will only report the number of Customers that would be deleted, or if the Customers will be deleted.
  - **Checked (☑)** - Only a count of the Customers will be reported.
  - **Unchecked (☐)** - The Customers will be deleted.

Delete Loyalty Accounts and Activities

This Task has the following parameters:

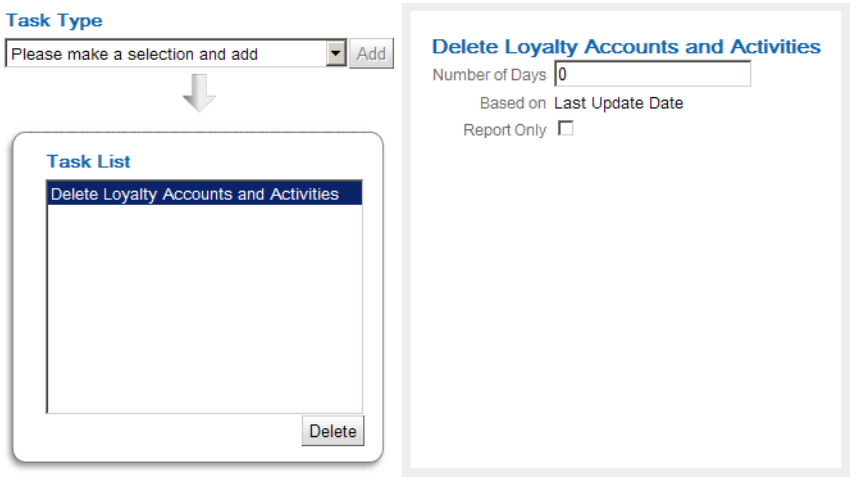


Figure 23-41: Delete Loyalty Accounts and Activities Parameters

- **Number of Days** - This Text Field defines the number of days after a Loyalty Account's Last Update Date on which a Loyalty Account and its Activities will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Loyalty Accounts that would be deleted, or if the Loyalty Accounts will be deleted.
  - **Checked (☑)** - Only a count of the Loyalty Accounts will be reported.
  - **Unchecked (☐)** - The Loyalty Accounts will be deleted.

Delete Loyalty Inquiry Activities

This Task has the following parameters:

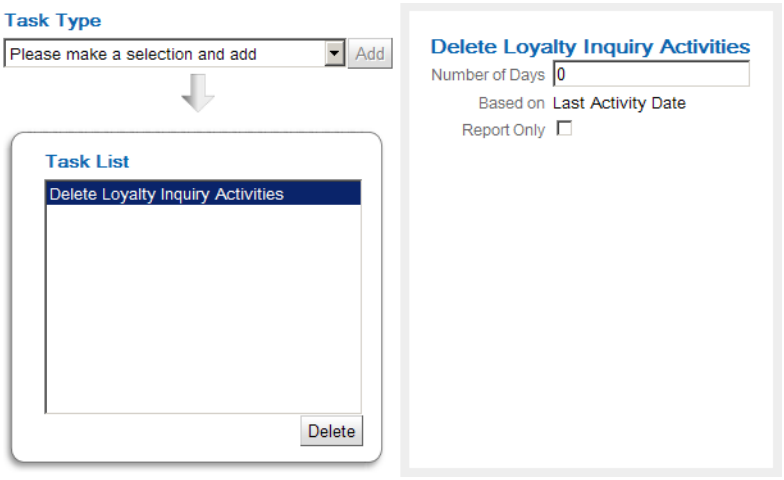


Figure 23-42: Delete Loyalty Inquiry Activities Parameters

- **Number of Days** - This Text Field defines the number of days after a Loyalty Inquiry's Last Activity Date on which a Loyalty Inquiry will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Loyalty Inquiries that would be deleted, or if the Loyalty Inquiries will be deleted.
  - **Checked (☑)** - Only a count of the Loyalty Inquiries will be reported.
  - **Unchecked (☐)** - The Loyalty Inquiries will be deleted.

Delete Segments

This Task has the following parameters:

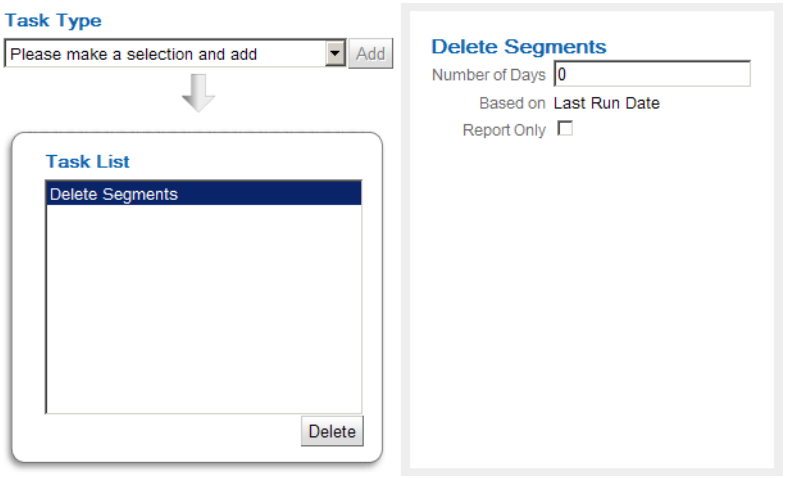


Figure 23-43: Delete Segments Parameters

- **Number of Days** - This Text Field defines the number of days after a Segment's Last Run Date on which a Segment will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Segments that would be deleted, or if the Segments will be deleted.
  - **Checked (☑)** - Only a count of the Segments will be reported.
  - **Unchecked (☐)** - The Segments will be deleted.

Delete Segment History

This Task has the following parameters:

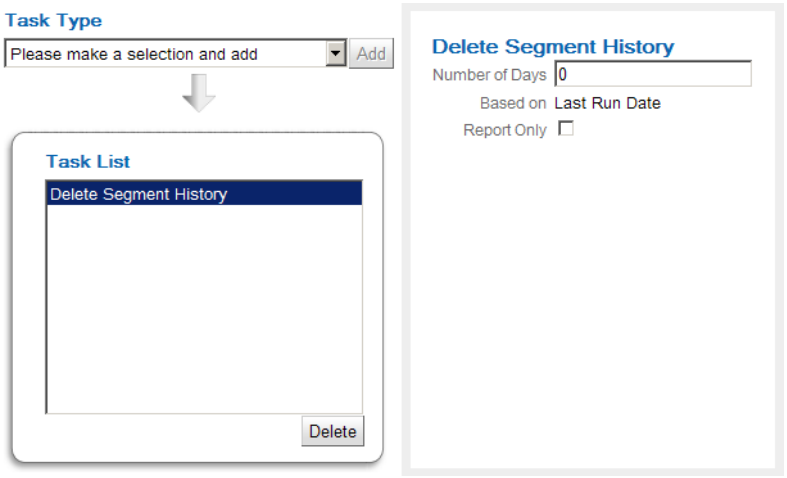


Figure 23-44: Delete Segment History Parameters

- **Number of Days** - This Text Field defines the number of days after a Segment's Last Run Date on which the History for the Segment will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Segment Histories that would be deleted, or if the Segment Histories will be deleted.
  - **Checked (☑)** - Only a count of the Segment Histories will be reported.
  - **Unchecked (☐)** - The Segment Histories will be deleted.

Delete Job History

This Task has the following parameters:

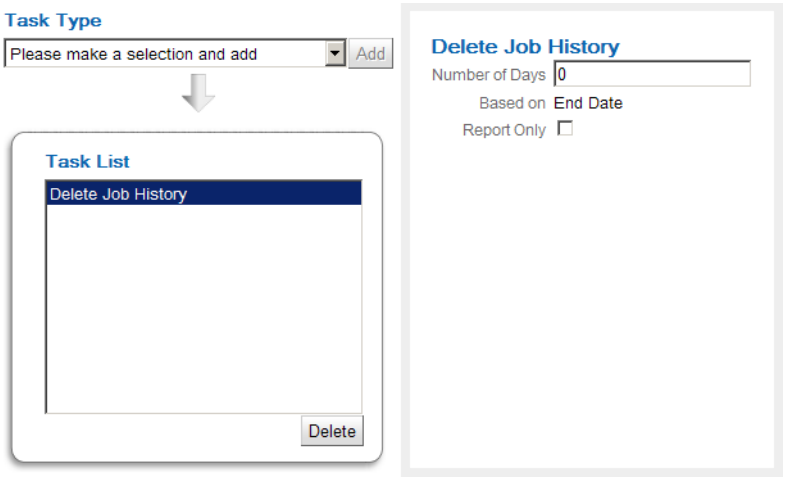


Figure 23-45: Delete Job History Parameters

- **Number of Days** - This Text Field defines the number of days after a Job's End Date on which the History for the Job will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Job Histories that would be deleted, or if the Job Histories will be deleted.
  - **Checked (☑)** - Only a count of the Job Histories will be reported.
  - **Unchecked (☐)** - The Job Histories will be deleted.

Delete Gift Registries

This Task has the following parameters:

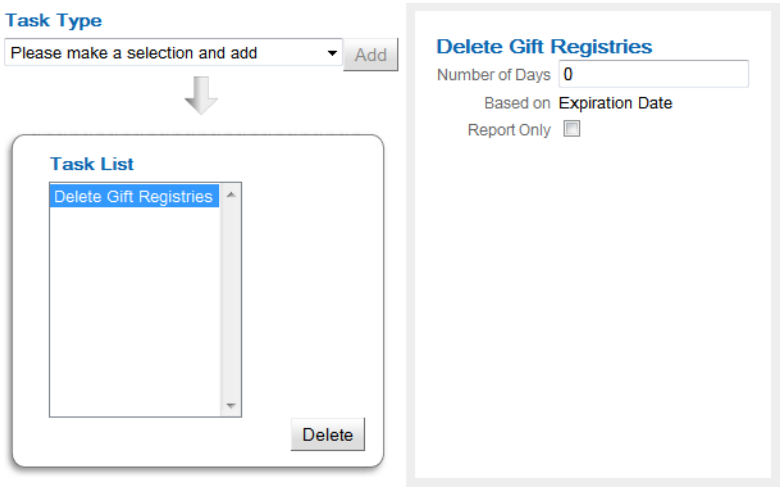


Figure 23-46: Delete Gift Registries Parameters

- **Number of Days** - This Text Field defines the number of days after a Gift Registry's Expiration Date on which the Gift Registry will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Gift Registries that would be deleted, or if the Gift Registries will be deleted.
  - **Checked (☑)** - Only a count of the Gift Registries will be reported.
  - **Unchecked (☐)** - The Gift Registries will be deleted.

Delete Inactive Gift Registries

This Task has the following parameters:

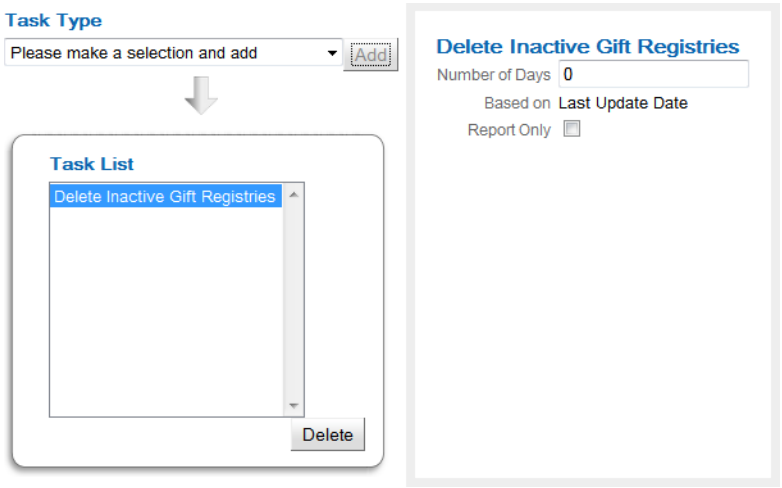


Figure 23-47: Delete Inactive Gift Registries

- **Number of Days** - This Text Field defines the number of days after an Inactive Gift Registry's Last Update Date on which the Gift Registry will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Gift Registries that would be deleted, or if the Gift Registries will be deleted.
  - **Checked (☑)** - Only a count of the Gift Registries will be reported.
  - **Unchecked (☐)** - The Gift Registries will be deleted.

Delete Social Activity

This Task has the following parameters:

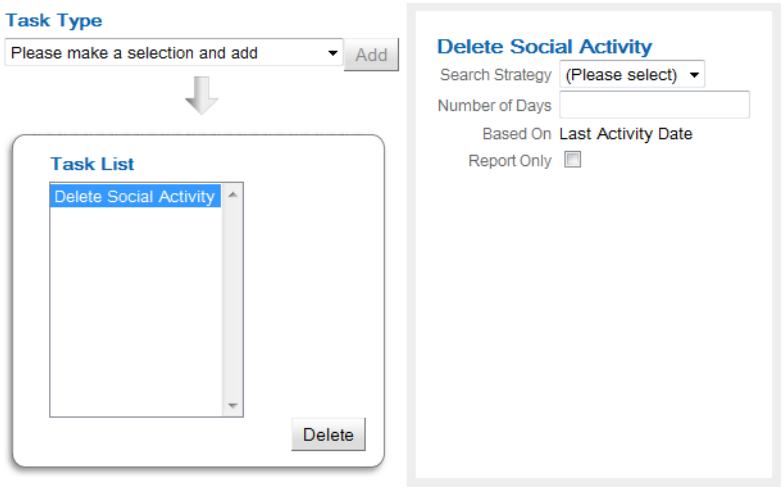


Figure 23-48: Delete Social Activity Parameters

- **Search Strategy** - This Selection Menu determines the social network for which the Social Activity is being deleted.
- **Number of Days** - This Text Field defines the number of days after a Social Activity item's Last Activity Date on which the item will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Social Activity items that would be deleted, or if the Social Activity will be deleted.
  - **Checked (☑)** - Only a count of the Social Activity items that will be reported.
  - **Unchecked (☐)** - The Social Activity will be deleted.

Delete Award Inquiry Activities

This Task has the following parameters:

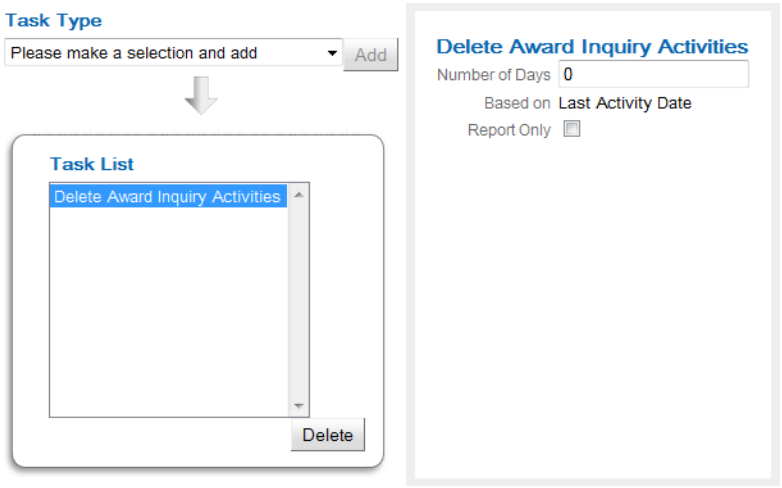


Figure 23-49: Delete Award Inquiry Activities Parameters

- **Number of Days** - This Text Field defines the number of days after a Award Inquiry's Last Activity Date on which a Award Inquiry will be deleted.
- **Report Only** - This Check Box indicates whether the Task will only report the number of Award Inquiries that would be deleted, or if the Award Inquiries will be deleted.
  - **Checked (☑)** - Only a count of the Award Inquiries will be reported.
  - **Unchecked (☐)** - The Award Inquiries will be deleted.

Aggregate Loyalty Facts

This Task has the following parameters:

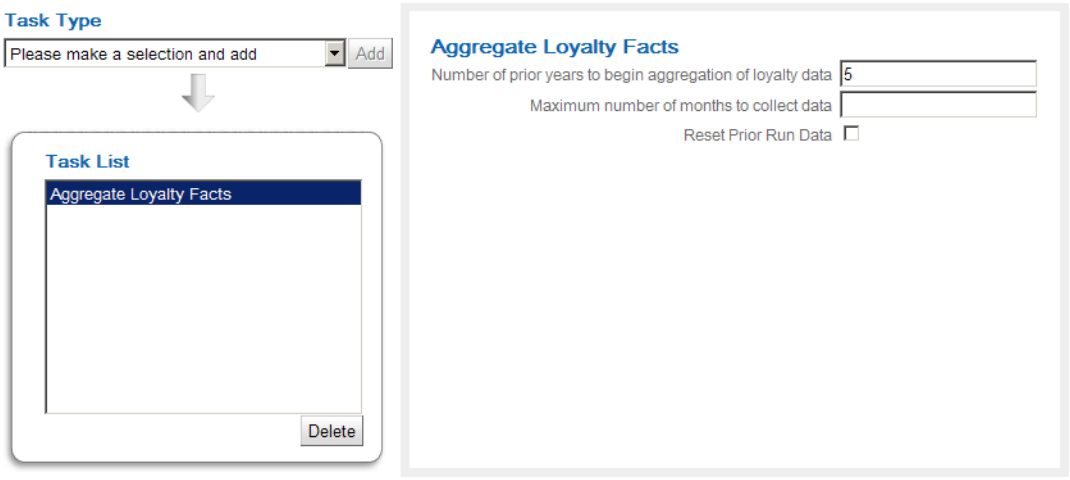


Figure 23-50: Aggregate Loyalty Facts Parameters

- **Number of prior years to begin aggregation of loyalty data** - This Text Field determines the number of years prior to the current date that will be included in the aggregation.
- **Maximum number of months to collect data** - This Text Field defines the number of months for which data will be aggregated.

  If this field is left blank **[DEFAULT]**, the system will aggregate all the data included in the indicated number of years.
- **Reset Prior Run Data** - This Check Box indicates whether the task will delete the previously aggregated loyalty information and create an entirely new summary, or if the summary information from previous aggregations will be kept
  - **Checked (☑)** - The task will remove all of the currently existing summary information and create an entirely new summary.
  - **Unchecked (☐)** - The task will keep the previously collected summary information.

Aggregate Tender Facts

This Task has no additional parameters.

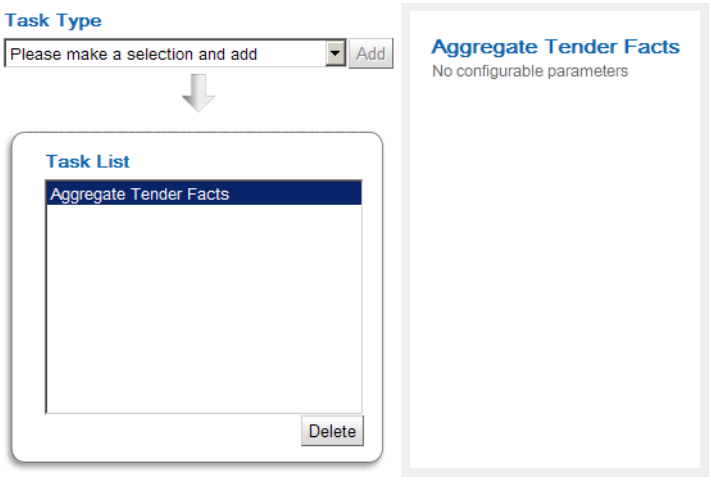


Figure 23-51: Aggregate Tender Facts Parameters

Dynamic Promotions

This job should be scheduled for the very early morning, before Users will be generating Promotions. This allows the Job to run before any Dynamic Promotions are generated (see below).

This Task has no additional parameters.

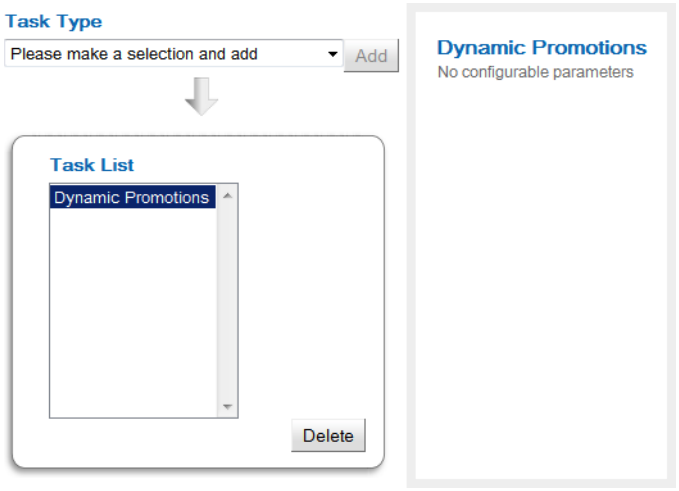


Figure 23-52: Dynamic Promotions Parameters

If a Dynamic Promotion was generated earlier in the day, do not run this job on the same day.

Do not run this job more than once per day.

Update Promotion Email Statistics

This task has the following parameters:

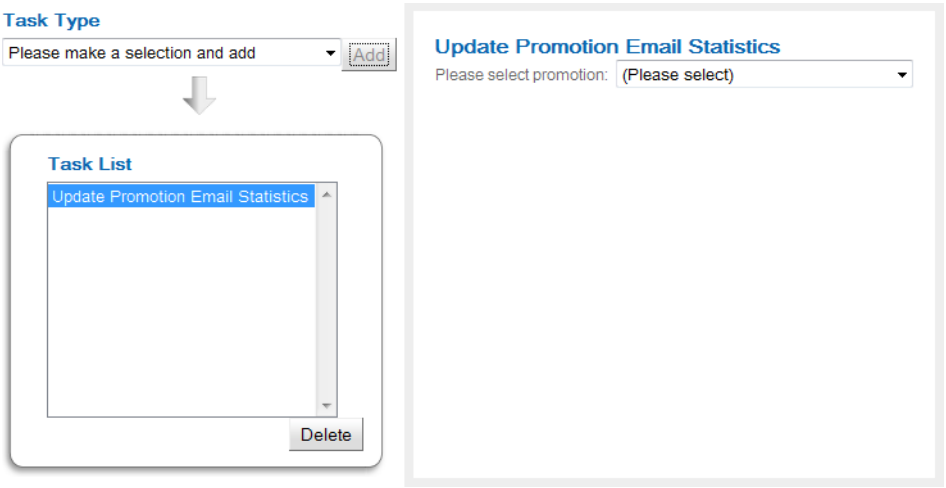


Figure 23-53: Update Promotion Email Statistics Parameters

- **Please select promotion** - This Selection Menu determines the message Promotion for which to update statistics.

Social Network Listener

This task has the following parameters:

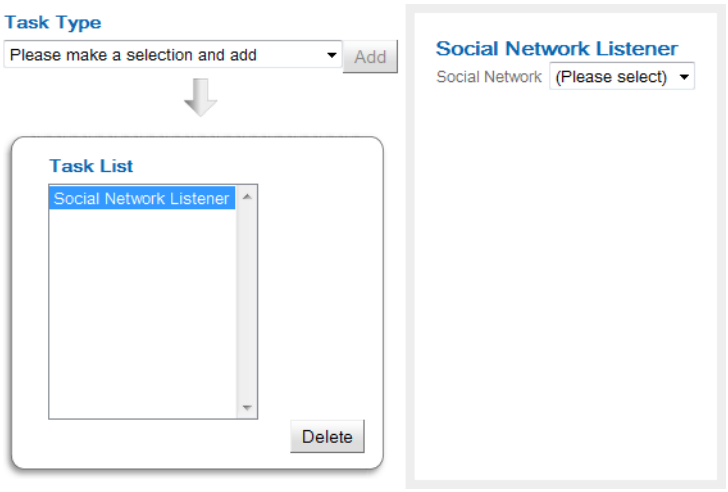


Figure 23-54: Social Network Listener Parameters

- **Social Network** - This Selection Menu determines the social network to search for social activity matching the entered criteria.

Social Network Update

This task has the following parameters:

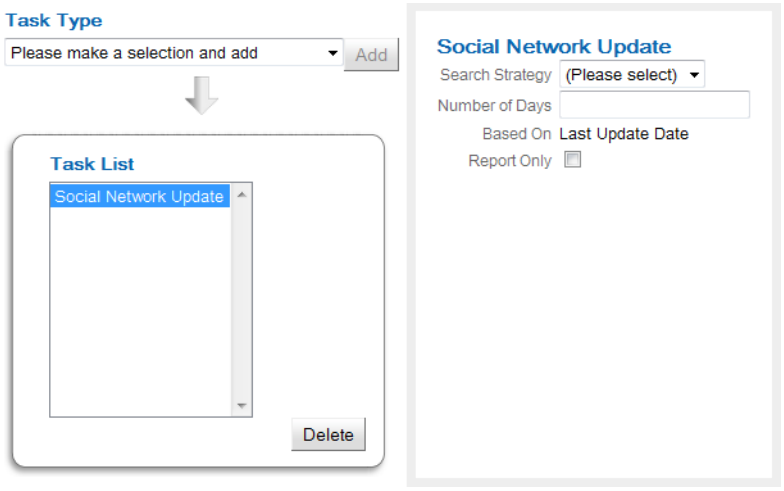


Figure 23-55: Social Network Update Parameters

- **Search Strategy** - This Selection Menu determines the social network for which the Social Activity is being deleted.
- **Number of Days** - This Text Field defines the number of days in the past for which to search for updates.
- **Report Only** - This Check Box indicates whether the Task will only report the number of updates available, or if the Social Profiles will be updated.
  - **Checked (☑)** - Only a count of the updates that will be reported.
  - **Unchecked (☐)** - Social Profiles will be updated.

Task Generator

This task has the following criteria:

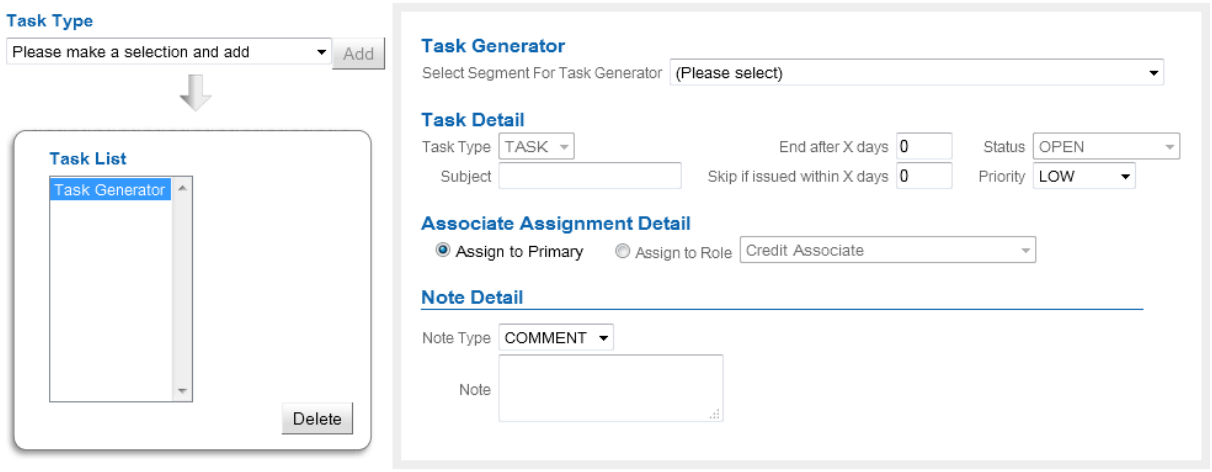


Figure 23-56: Task Generator Parameters

- **Select Segment For Task Generator** - This Selection Menu determines the Segment for which tasks will be generated.
- **Task Type** - This field cannot be edited.
- **Subject** - **[REQUIRED]** This Text Field defines the subject line for the tasks.
- **End after X days** - This Text Field defines the number of days from the present day that the task will end.
- **Skip if issued within X days** - This Text Field defines a number of days before the present date in which, if the customer had a task created within those days, the job will not generate a task for that customer.
- **Status** - This field cannot be edited.
- **Priority** - This Selection Menu defines the priority for the created tasks.
- **Associate Assignment Detail** - These Radio Buttons determine the associate role for the associate who will be assigned each task.
  - **Assign to Primary** - Assign each task to the customer's primary associate.
  - **Assign to Role** - Assign each task to the associate assigned to a specified role.
    - If **Assign to Role** is selected, a Selection Menu is enabled for determining the associate role to use when assigning the tasks.
- **Note Type** - This Selection Menu determines the type of note (if any) to add to each task.
- **Note** - This Text Area Field is used to enter the text of a note (if any) to add to each task.

CHAPTER 24

Analytics/Reports

Overview

Relate provides a set of pre-defined reports that cover all aspects of the application. The results can be modified through sorting and filtering.

About this Chapter

This chapter contains the following information:

- "Reports" on page 671 - Describes the Reports page and the procedures for creating a Report.
- "Displaying Report" on page 680 - Describes the Reports display page.

Reports

The Reports page is opened through the **Analytics->Reports** menu option.

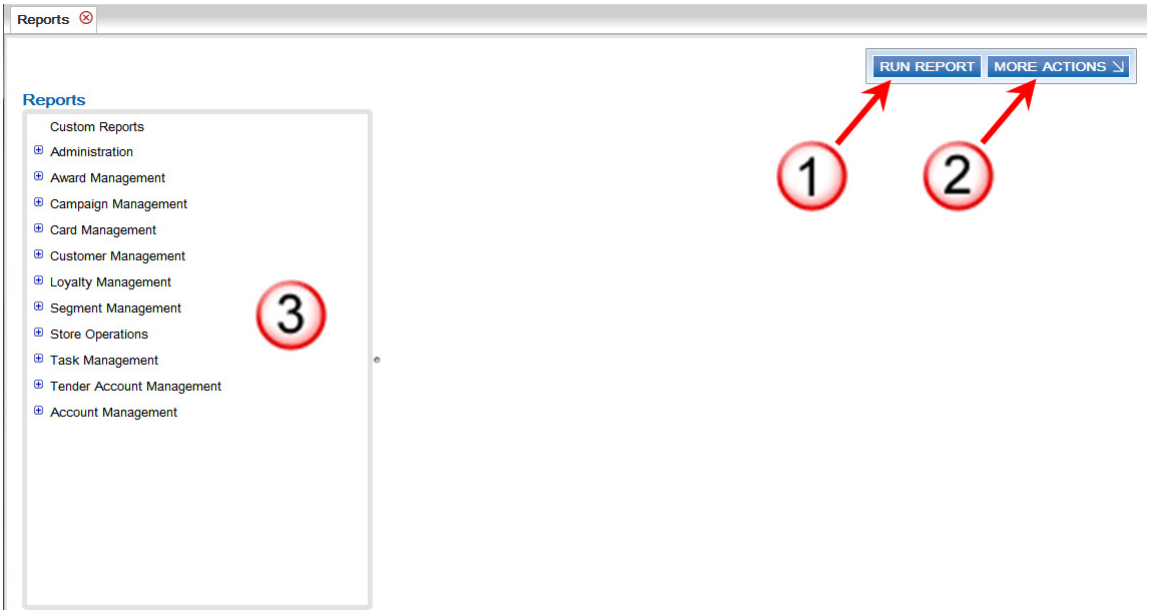


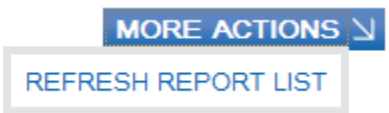
Figure 24-1: Reports Page

Table 24-1: *Reports Page Key*

Item	Description
1	**Run Report Button** - This button runs the selected report using the entered criteria. See "Run a Report" on page 672 for more information.
2	**More Actions Menu** - The Actions Menu for the Reports page. See "More Actions Menu" on page 671 for more information.
3	**Report Selection** - This area contains the Report categories and the individual Reports that can be selected to run.

More Actions Menu

The More Actions Menu is the Actions Menu for the Reports page. This menu has the following options:



- **REFRESH REPORT LIST** - Refreshes the list of currently-available Reports. See "Refresh Report List" on page 673.

Run a Report

To run a report:

1. Click the **Analytics->Reports** menu option.

   The Reports page opens (Figure 24-1).

2. Select the Report to run:

   a. In the Report Selection area, click the expand (⊞) button to open a Report category (see "Report Organization" on page 673 for a list of Report categories and the Reports within each category).

   b. Click a Report to select it.

   A Report Criteria screen opens.

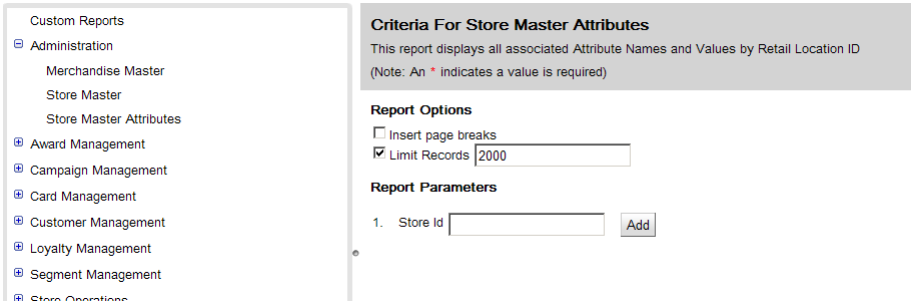


Figure 24-2: Report Selection Criteria

3. Enter the appropriate information into the criteria fields.



- Fields can be left blank unless they are required (labeled with *).
- Blank fields will not be used in the search.

4. Click the **Run Report** button.

   The Report runs and the results are displayed in a Displaying Report page.

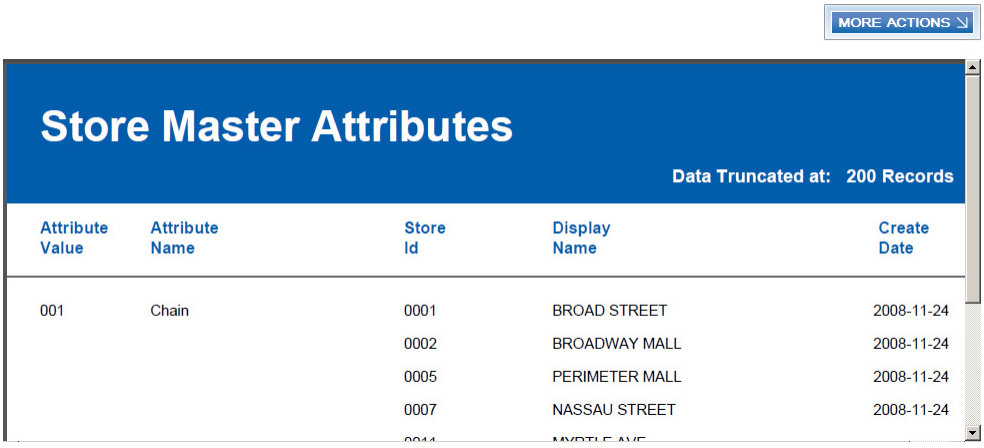


Figure 24-3: Report Run Results

Refresh Report List

Click the **Refresh Report List** option in the More Actions Menu to refresh the Report List with any updates or new Custom Reports that have been added to the system.

Report Organization

Almost all reports require additional configuration information that limit the results returned. Most fields allow the user to create Lists of multiple items to be included in the report.



For most fields, if no information is entered for a configuration field, all results for that field are included in the report (up to the defined **Limit Records** *setting).*

Administration

Administration reports provide information about locations, merchandise, and users.

- **Merchandise Master** - This report returns details about the merchandise hierarchy beneath a given Hierarchy ID.
- **Location Master** - This report displays basic information about every Location in the database.
- **Location Master Attributes** - This report displays all associated Attribute Names and Values by Retail Location ID.

Award Management

Award Management reports provide information about Award Accounts.

- **Award Account Activity Details** - This report returns detailed information about activities performed on a given Award Account.
- **Award Account Activity Errors** - This report returns detailed information about transaction errors associated with Award Accounts.
- **Award Account Activity Trend** - This report returns daily counts of Award Transactions, organized by Activity type, within a Program.
- **Award Account Balance** - This report returns the Account balance available at run time for each Account.
- **Award Account Error Trend** - This report returns information about the number of times transaction errors occurred, by date, for each Program.
- **Award Account Last Use** - This report returns counts of Accounts within an Award Program, grouped by the number of days between last use date and system date at run time.
- **Award Activity By Account** - This report returns transaction details organized by individual Award Account.
- **Award Activity By Program** - This report returns a summary of all Account activities, listed by type, for each Program.

- **Award Activity By Location** - This report returns Award activity within a Program, by Location, for selected date range.
- **Award Coupon Expiration** - This report returns a count and overall value of Coupons organized by expiration date for each Award Program.
- **Award Coupon List** - This report displays current balance information for each Award Coupon within each Account.
- **Award Program Balance Summary** - This report returns summary statistics about current Account balances within each Award Program.
- **Award Program Definitions** - This report returns details about each Award Program definition.
- **Award Redemption Rate** - This report returns detailed information about the number of Award certificates issued and redeemed for each Card Name, Card Prefix, Card Series, and Program.

Campaign Management

Campaign Management reports provide information about Campaigns.

- **Campaign Listing** - This report returns basic information about each Campaign defined in the system.
- **Deal Item Rules Summary** - This report returns the Item Rules for each Deal.
- **Deal Library** - This report returns information about each Deal defined within the system.
- **Promo Response - Cust Category** - This report profiles the merchandise purchased by each Customer in response to each Promotion event.
- **Promotion Coupon List** - This report returns the Coupons issued by each Promotion event for each associated Deal.
- **Promotion Deal List** - This report displays the Deals that are associated with specified Promotion events.
- **Promotion Listing** - This report displays the Promotions associated with each Campaign.
- **Promotion Location Rules Summary** - This report returns the Location rules applicable to each Promotion within each Campaign.
- **Promotion Response By Category** - This report returns the event response, by Product Hierarchy, for the selected Promotion events.
- **Promotion Response By Customer** - This report returns the event response, by Customer, for the selected Promotion events.
- **Promotion Response By Date** - This report summarizes the value of the response, by business date, to the selected Promotion events.
- **Promotion Response By Deal** - This report summarizes the value of the response, by Deal, to the selected Promotion events.
- **Promotion Response By Location** - This report summarizes the value of the response, by Location, to the selected Promotion events.

- **Promotion Response By Target** - This report returns response data, by Segment Target, for selected Promotion events.
- **Promotion Response Detail** - This report displays information about the Transactions in which each Promotion was responded to.
- **Promotion Response Summary** - This report displays summary information about the responses to each Promotion.
- **Promotion Serialized Coupon List** - This report returns information about the Serialized Coupons created by each Promotion.
- **Promotion Target Detail** - This report displays information about the Customers belonging to each Segment Target assigned to each Promotion within a Campaign.
- **Promotion Target List** - This report lists displays information about the Segment Targets associated with each Promotion within a Campaign.
- **Promotion Target Segment List** - This report displays a list of each Target Segment associated with each Promotion within a Campaign.
- **Promotion Task Status** - This report displays the number of Tasks, organized by current status, within each Promotion.

Card Management

Card Management reports provide information about Cards and Card Definitions.

- **Card Batch Activation Rate** - This report displays the activation rate for each Card Series and each Batch within each Series.
- **Card Detail** - This report returns detailed information about individual Cards defined in the system.
- **Card Owners** - This report returns information about the Customers assigned to individual Cards.
- **Card Program Association** - This report returns the Program associated with each Card Prefix.
- **Card Series Activation Rate** - This report returns the activation rate for each Card Series created for each Card Type.
- **Card Series Definitions** - This report returns a summary for each Card Series created for each Card Type.
- **Card Types** - This report returns information about all defined Card Types for which at least one Card Series has been produced.

Customer Management

Customer Management reports provide information about Customers.

- **Address Master** - This report returns detailed information about Customer addresses.
- **Address Summary** - This report returns a count of primary Customer address types, grouped by validation state.
- **Birthday Summary** - This report returns Customer counts by birth month.

- **Customer Alt Key Summary** - This report returns counts of the number of Customers by Alternate Key Type.
- **Customer Assoc Assign By Assoc Role** - This report returns a list of Customers grouped by the Associate ID and Role of the Associate assigned to the Customer.
- **Customer Associate Assignment Role** - This report returns a list of Associates grouped by the Customer to which the Associates are assigned.
- **Customer Clienteling Report List** - This report returns a list of Customers grouped by the Associate to whom they are assigned through Clienteling.
- **Customer Contact Email List** - This report returns a listing of Customer names and addresses, and e-mail (multiple addresses can be returned) by Signup Location.
- **Customer Contact Phone List** - This report returns a listing of Customer names and addresses, and phone number (multiple addresses can be returned) by Signup Location.
- **Customer List** - This report returns a listing of (identified) Customer names and addresses.
- **Customer Master** - This report returns a listing of Customer demographic information.
- **Customer Notes** - This report returns all Customer Notes.
- **Customer Purch By Dept By Year** - This report returns a summary of Customer purchase activity by Department.
- **Customer Purchase Profile** - This report returns all purchase details, grouped by Class and Department, organized by Customer.
- **Customer Status Summary** - This report returns the number of Customer records grouped by Identified/Unidentified (Anonymous Flag) within Active/Inactive (Status Flag).
- **E-Mail Summary** - This report returns a count of active Customers by e-mail address type.
- **Gender Summary** - This report returns the count of Customers grouped by gender.
- **Postal Code Summary** - This report returns a count of primary, active, home address records by Postal code.
- **Shoppers By Department** - This reports returns the number of Customers who made purchases within a given Department, within a given period of time.
- **Social Network Summary** - This report shows a count of Customer Social Profiles for each social network.
- **State Summary** - This report returns a count of primary home address records by state.
- **Location Capture Rate** - This report returns a count of Customers, by Anonymous Flag, for each Sign Up Location.
- **Telephone Summary** - This report returns a count of active Customers by primary phone type.
- **Thank You List** - This report returns a listing of Customer names, addresses (primary home address only), and sums of purchase activities.
- **Transaction Detail** - This report returns detailed information for each Transaction performed.

- **Transaction Header Totals** - This report returns amount totals from Transaction headers.
- **Transaction Post Void** - This report returns data on post void transactions and the respective, original transactions that were post voided.
- **Transaction Returns Detail** - This report returns detailed information for each Return Transaction.

Loyalty Management

Loyalty Management reports provide information about Loyalty Accounts.

- **Loyalty Account Detail** - This report returns details of the activities performed on each Loyalty Account.
- **Loyalty Acct Activity Errors** - This report returns details of errors for Loyalty Accounts by Program ID.
- **Loyalty Acct Level Summary** - This report returns the account balance statistics for a given Loyalty account.
- **Loyalty Activity Type Summary** - This report returns the number of points resulting from each Activity associated with each Program Level ID and Program by date.
- **Loyalty Activity Type Trend** - This report returns the number of Accounts performing each Activity Type on each date, organized by Program Level within each Program, during a period of time.
- **Loyalty Issue Rule Impact** - This report returns a list of merchandise purchased where the Loyalty rule was applied.
- **Loyalty Rules Results Summary** - This report returns the number of points and accounts, by Activity Type, resulting from each Loyalty Rule, organized by Program Level and Program.
- **Loyalty Rules Results Trend** - This report returns the number of points and accounts, by Activity Type and Date, resulting from each Loyalty Rule, organized by Program Level and Program.
- **Lyl Accounts - Balance Summary** - This report returns summary information about the Loyalty Account balances, by Program Level, within each Program.
- **Lyl Accounts - Last Use** - This report returns Loyalty Account summary information within a Loyalty Program Level, grouped by the number of months since last use date and system date.
- **Lyl Accounts - Lifecycle** - This report returns Loyalty Account summary information within a Loyalty Program Level, grouped by the number of months the accounts have been in use.
- **Lyl Acct Act Summary - Award** - This report returns the earned points from Award rules, by Loyalty Account, within a given period of time.
- **Lyl Acct Act Summary - Issue** - This report returns the earned points from Issue rules, by Loyalty Account, within a given period of time.
- **Lyl Program Level Summary** - This report returns the current balance statistics for each Program Level within a Program.

Segment Management

Segment Management reports provide information about Segments.

- **N-Tile Strata Summary** - This report returns all values for selected N-tile strata.
- **Range Strata Summary** - This report returns all values for selected range strata.
- **Segment By Home Location** - This report returns a count of Customers, by Home Location, for each Customer Segment.
- **Segment By State** - This report returns a count of Customers, by State, for each Customer Segment.
- **Segment Contact List** - This report returns a listing of Customer names and contact information for the selected Segment(s).
- **Segment Count List** - This report returns the details about each Customer Segment defined in the system.
- **Segment Customer Master** - This report returns a listing of information about the Customers in each Segment.
- **Segment Purchase Profile** - This report returns counts, by Segment, of individual Items purchased.
- **Stratified Segment Trends** - This report returns the trended counts for selected Stratified Segments.
- **Unstratified Segment Trends** - This report returns the trended counts for selected Unstratified Segments.

Location Operations

Location Operations reports provide location-specific data.

- **Capture Quality Report** - This report returns the percentage of validated Customer data, organized by Operator ID, within each Location.
- **Customers by Home Location** - This report returns a count of Customers for each Home Location.
- **Shoppers By Location** - This report returns Customer count and purchase statistics for each Location.
- **Sign Up Location** - This report returns the number of Customers by signup Location.
- **Sign Up Location By State** - This report returns the number of Customers by state, grouped by signup Location.
- **Sign Up Location By Zip Code** - This report returns the number of Customers, by Zip Code (or Postal Code) and on a given date, who signed up at the Location.
- **Sign Up Location Daily Trend** - This report returns Customer counts by signup date and signup Location.

Task Management

Task Management reports provide information about User-assigned Tasks.

- **Associate Task Detail** - This report returns detailed information about Tasks, organized by Task type, for each Associate who created a Task.
- **Associated Task Summary** - This report returns a summary of the types of Tasks created by each Associate.
- **Task Summary** - This report returns, for a selected date range, the number of Tasks, by Task status, for each Task type.

Tender Account Management

Tender Account Management reports provide information about Tender Accounts.

- **Tender Account Activation Summary** - This report returns summary counts of Tender Account activation Transactions, organized by Program within each Location.
- **Tender Account Activity By Series** - This report displays summary counts of Tender Account activities, organized by Card Series within Card Prefix, for each Tender Program.
- **Tender Account Activity By Location** - This report returns Tender Account Transaction Type counts, organized by Location ID within each Program.
- **Tender Account Activity Detail** - This report displays all Tender Account activities by Program.
- **Tender Account Activity Error Summary** - This report returns summary counts of Tender Account activity errors, organized by Program ID.
- **Tender Account Activity Errors** - This report displays detailed information about each Tender Account activity error.
- **Tender Account Activity Summary** - This report returns Tender Account activity statistics, organized by Card Prefix and Card Series, within each Program.
- **Tender Account Balance Summary** - This report returns the number of Accounts within a Tender Program, grouped by outstanding balance range.
- **Tender Account Listing** - This report returns a list of all Tender Accounts within each Program.
- **Tender Account Recharge Summary** - This report summarizes Tender Account recharges for each Program within each Location.
- **Tender Account Redemption Summary** - This report summarizes Account redemptions for each Program within each Location.
- **Tender Accounts - Last Use** - This report returns Account summary information within a Tender program, grouped by Card Prefix and the number of months since last use date and system date.
- **Tender Accounts - Lifecycle** - This report returns Account summary information within a Tender program, grouped by Card Prefix and the number of months the Card has been in use.
- **Tender Activity Summary** - This report summarizes Tender Account activity by Transaction Type, organized by Program ID.
- **Tender Activity Summary By Batch** - This report summarizes Tender Account activity at the Card Prefix, Card Series, and Card Batch levels, organized by Transaction Type.

- **Tender Activity Type Trend** - This report returns daily counts of Tender Account Transactions by activity type within each Program.

Account Management

Account Management reports provide information about account activity.

- **Account Management** - This report returns summary information about the reason codes used by each User for each activity type performed within each Program. The Programs are organized by Program type (i.e. Account, Loyalty, or Tender).

Item Management

Item Management reports provide information about items and their attributes.

- **Item Attribute Summary** - This report provides a count of Items that are associated with each given Item Attribute and Attribute value.

Registry Management

Registry Management reports provide information about Customer Gift Registries.

- **Gift Registry Detail** - This report provides detailed information about each Registry.

Displaying Report

The Displaying Report page displays the results of a Report run using the specified criteria.

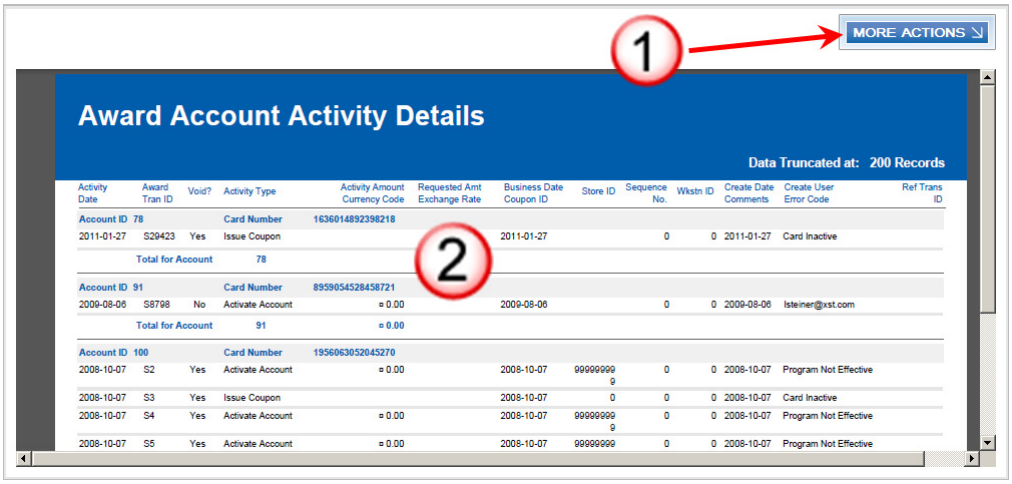


Figure 24-4: Displaying Reports Page

Table 24-2: *Displaying Reports Page Key*

Item	Description
1	**More Actions Menu** - The Actions Menu for the Reports page. See "More Actions Menu" on page 681 for more information.

Table 24-2: *Displaying Reports Page Key (continued)*

Item	Description
2	**Report Display Pane** - The page area displaying the Report.

More Actions Menu

The More Actions Menu is the Actions Menu for the Displaying Reports page. This menu has the following option:



- **EXPORT REPORT AS EXCEL** - Export the Report information as a Microsoft Excel file. See "Export Report as Excel" on page 681.
- EXPORT REPORT AS CSV - Export the Report as a comma-separated values (CSV) file. See "Export Report as CSV" on page 681.

Export Report as Excel

To export a Report displayed in a Displaying Report page as an Excel® spreadsheet, click **EXPORT REPORT AS EXCEL** in the More Actions Menu.



After clicking **EXPORT REPORT AS EXCEL***, the download procedure will follow the rules specific to your browser and/or operating system.*

Export Report as CSV

To export a Report displayed in a Displaying Report page as a comma-separated values (CSV) file, click **EXPORT REPORT AS CSV** in the More Actions Menu.



After clicking **EXPORT REPORT AS CSV***, the download procedure will follow the rules specific to your browser and/or operating system.*

PDF Options Toolbar

The PDF Option toolbar provides access to some actions that can be performed on the PDF Report displayed in the Report Display Pane.



Figure 24-5: PDF Options Toolbar

Table 24-3: *Displaying Reports Page Key*

Item	Description
1	**Save Button** - Save the PDF version of the Report.
2	**Print Button** - Print the PDF.
3	**Zoom Out** - Zoom out of the PDF to view a larger area of the Report.
4	**Zoom In** - Zoom in on the PDF to view the Report more closely.
5	**Show Acrobat Toolbar** - Show the full toolbar for Adobe Acrobat® (This option may not be available on all systems).

Save Report

To save a Report as a PDF:

1. Run the Report to be saved (see "Run a Report" on page 672).
2. Move the mouse into the Report Display pane.

   The PDF Options Toolbar opens.
3. Click the **Save** button.

   The save/download process for your system begins.

> *The process from this point forward will depend upon your browser and operating system. See your system documentation for more information.*

Print Report

To print a Report:

1. Run the Report to be printed (see "Run a Report" on page 672).
2. Move the mouse into the Report Display pane.

   The PDF Options Toolbar is displayed.
3. Click the **Print** button.

   The printing process for your system begins.

> *The process from this point forward will depend upon your browser and operating system. See your system documentation for more information.*

Acrobat Toolbar

The Acrobat toolbar provides additional options for viewing and using the PDF.

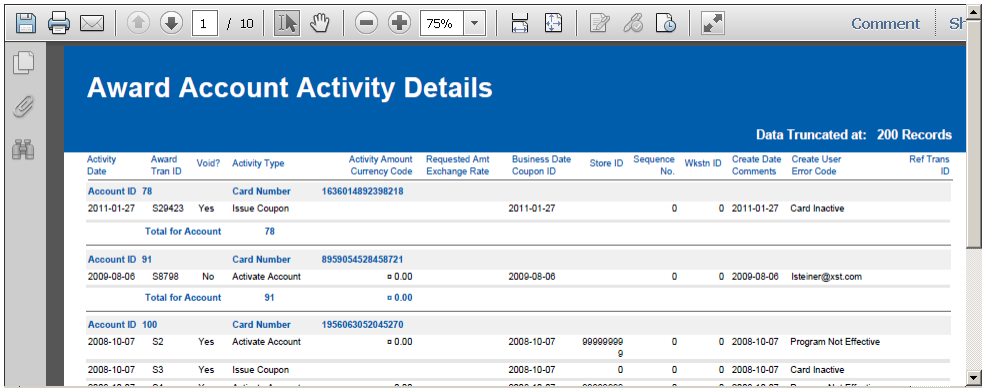


Figure 24-6: Acrobat Toolbar

> *This toobar may not be available on all systems.*

For more information about the Acrobat toolbar, see your Adobe Acrobat documentation.

Tender Activity Report

The Tender Activity Report displays a List of detailed information about tendering actions on Cards that were performed in Relate. These actions are filtered by a set of defined search criteria.

This page is only available in systems with User Organization Security turned on, and to Users assigned the **RelateStandalone_TenderActivityReport** Role.

See also: The *Relate Configuration Guide* for more information about configuring properties and Roles in Relate.

Tender Activity Report Page

The Tender Activity Report search page is opened using the **Analytics->Tender Activity Report** menu option.

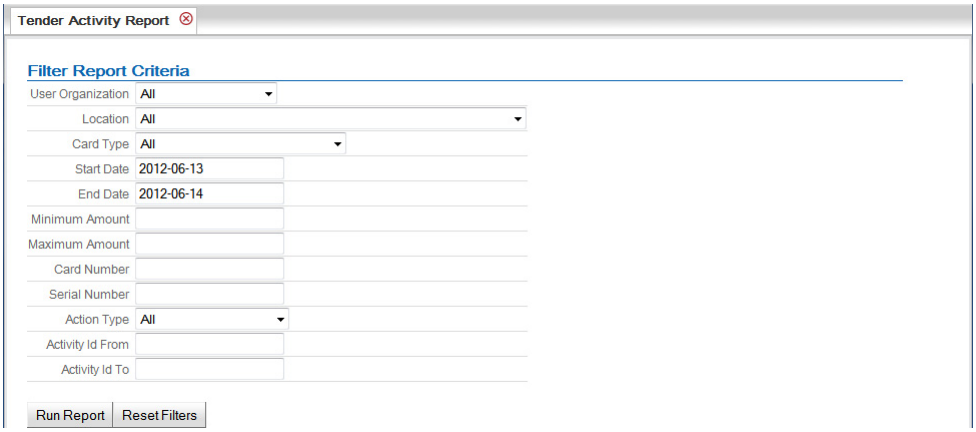


Figure 24-7: Tender Activity Report Page

To run a Tender Activity Report, enter the Filter Report Criteria. After entering the search criteria, click the **Run Report** button to display the matching actions, or click the **Reset Filters** button to empty the fields and restore the default values.

Filter Report Criteria

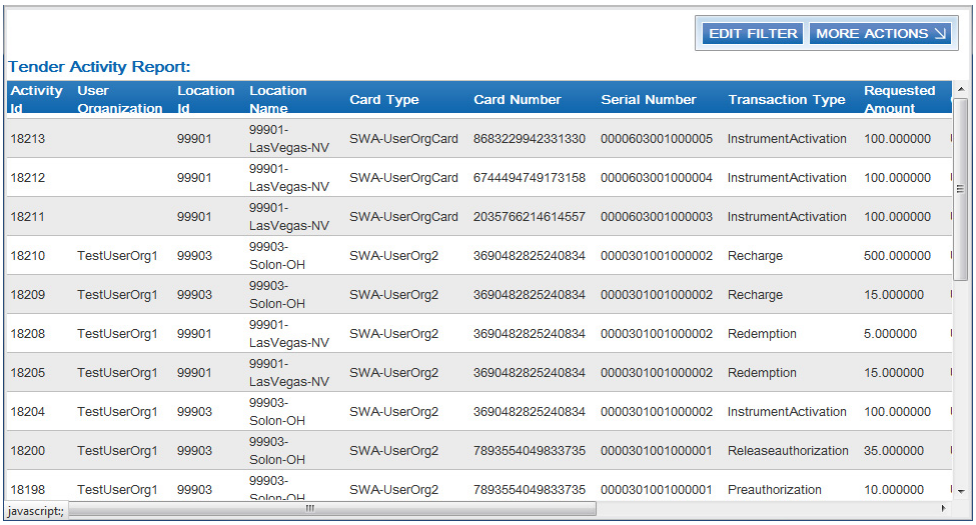
This form contains the following fields:

- **User Organization** - This Selection Menu determines the User Organization to which actions must belong.
- **Location** - This Selection Menu determines the Location where the actions were performed.
- **Card Type** - This Selection Menu determines the type of Card associated with the actions.
- **Start Date** - This Calendar Menu determines the start of the date range for actions.

- **End Date** - This Calendar Menu determines the end of the date range for action.
- **Minimum Amount** - This Text Field determines the minimum currency amount of an action.
- **Maximum Amount** - This Text Field determines the maximum currency amount of an action.
- **Card Number** - This Text Field determines the Card Number to which the actions must be associated.
- **Serial Number** - This Text Field determines the Serial Number of the Card to which the actions must be associated.
- **Action Type** - This Selection Menu determines the type of action performed.
- **Activity Id From** - This Text Field determines the lower end of a range of action IDs.
- **Activity Id To** - This Text Field determines the upper end of a range of action IDs.

Report

After entering the Filter Report Criteria and running the report, a List of matching actions is displayed.



Activity Id	User Organization	Location Id	Location Name	Card Type	Card Number	Serial Number	Transaction Type	Requested Amount
18213		99901	99901-LasVegas-NV	SWA-UserOrgCard	8683229942331330	0000603001000005	InstrumentActivation	100.000000
18212		99901	99901-LasVegas-NV	SWA-UserOrgCard	6744494749173158	0000603001000004	InstrumentActivation	100.000000
18211		99901	99901-LasVegas-NV	SWA-UserOrgCard	2035766214614557	0000603001000003	InstrumentActivation	100.000000
18210	TestUserOrg1	99903	99903-Solon-OH	SWA-UserOrg2	3690482825240834	0000301001000002	Recharge	500.000000
18209	TestUserOrg1	99903	99903-Solon-OH	SWA-UserOrg2	3690482825240834	0000301001000002	Recharge	15.000000
18208	TestUserOrg1	99901	99901-LasVegas-NV	SWA-UserOrg2	3690482825240834	0000301001000002	Redemption	5.000000
18205	TestUserOrg1	99901	99901-LasVegas-NV	SWA-UserOrg2	3690482825240834	0000301001000002	Redemption	15.000000
18204	TestUserOrg1	99903	99903-Solon-OH	SWA-UserOrg2	3690482825240834	0000301001000002	InstrumentActivation	100.000000
18200	TestUserOrg1	99903	99903-Solon-OH	SWA-UserOrg2	7893554049833735	0000301001000001	Releaseauthorization	35.000000
18198	TestUserOrg1	99903	99903-Solon-OH	SWA-UserOrg2	7893554049833735	0000301001000001	Preauthorization	10.000000

Figure 24-8: Tender Activity Report

The Tender Activity Report List contains the following information for each action matching the entered search criteria:

- **Activity Id** - ID of the activity.
- **User Organization** - User Organization associated with the activity.
- **Location Id** - ID of the Location where the activity was performed.
- **Location Name** - Name of the Location where the activity was performed.
- **Card Type** - Type of Card on which the activity was performed.
- **Card Number** - Card Number of the Card.

- **Serial Number** - Serial Number of the Card.
- **Transaction Type** - Type of action performed.
- **Requested Amount** - Tender amount of the action.
- **Currency** - Three-letter ISO currency code for the currency used in the action.
- **Exchange Rate** - Exchange rate for the currency to the User's default currency.
- **Amount** - Tender amount of the action, in the User's default currency.
- **Program Currency** - Three-letter ISO currency code for the default currency used in the Program associated with the action.
- **Activity Date/Time** - Date and time that the action was performed.

More Actions Menu

The Actions Menu for the Tender Activity Report contains the following option:



EXPORT REPORT - Export the report to a comma-separated values (CSV) file. See Export Report (below) for more information.

Run New Report

To run a new report, click **EDIT FILTER**.

Relate returns to the Filter Report Criteria form. The criteria for the current report remains in the proper fields.

Export Report

To export a Tender Activity Report to a comma-separated values (CSV) file:

1. Click **EXPORT REPORT** in the More Actions Menu for a Tender Activity Report.

   An **Export File** Link is created at the top of the Report.

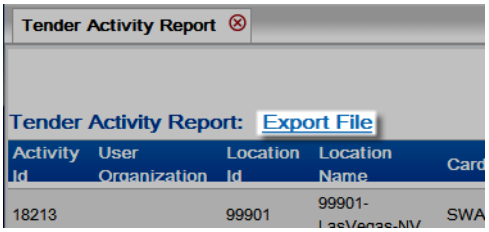


Figure 24-9: Export File Link

2. Click the **Export File** Link.
3. Follow the file download rules for your browser and operating system. Check the related documentation for further information.

   The Tender Activity Report is downloaded in a gzipped (.gz) CSV file.



Segment Queries

Overview

When creating an Unstratified or a Stratified Segment, it is important to know what you need to enter/select in each field, whether there is a particular format for the data entered, and what the query is going to return. If you are not sure what Relate is doing, you may get an error on the query or the results may not be what you expect.

This appendix explains what is required for each query template.

The following conventions apply to data entry when creating a segment:

- Dates must be in the `MM/DD/YYYY` format.
- When entering numbers, do not use commas, dollar signs, or decimal places unless specifically instructed to do so.
- When entering text, do not use any punctuation unless instructed otherwise.

Segment Queries

The following is a list of the Segment Query categories:

- "Customer Demographics" on page 688
- "Customer Contact" on page 691
- "Customer Attributes" on page 692
- "Purchase Activity" on page 693
- "Basic Programs" on page 700
- "Segment Elements" on page 702
- "Promotion Activity" on page 702
- "Strategic Segments" on page 703
- "Loyalty Segments" on page 704

- "Social Networks" on page 707
- "Social Profiles" on page 708

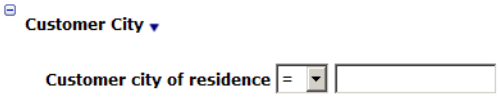
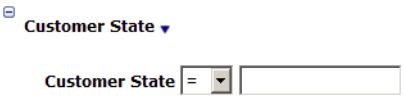
Stratified Queries

The following is a list of the Stratified Query categories:

- "Loyalty Summary" on page 709
- "Transaction Criteria" on page 711
- "Line Item Detail" on page 713

Segment Queries

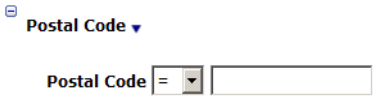
Customer Demographics

Customer ID	This query returns active and valid Customers whose Customer ID matches your input. ■ **Customer whose Customer ID** - The Customer ID of the Customer. 
Customer City	This query returns active and valid Customers whose primary and active address is in the city you have specified. ■ **Customer City** - The city of the Customer's primary address. 
Customer State	This query returns active and valid Customers whose primary and active address is in the state you have specified. ■ **Customer State** - The state or province of the Customer's primary address. 

Postal Code

This query returns active and valid Customers whose primary and active address is in the postal code (zip code) you have specified. Use only five digits for US zip codes.

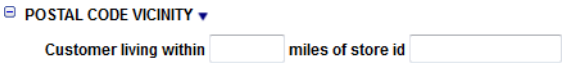
- **Postal Code** - The Postal Code or ZIP Code of the Customer's primary address.



Postal Code Vicinity

This query returns active and valid Customers whose addresses are within a radius of a specified number of miles of a specified location.

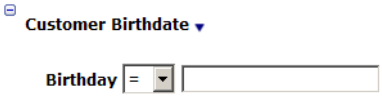
- **Customer living within ___ miles** - The distance within which to search for Customer addresses.
- **of location id** - The Location ID of the location.



Customer Birthdate

This query returns Customers whose birthday matches the parameters you input. The date you input must be a valid date ([DEFAULT] = current date).

- **Customer Birthdate** - Birthdate of the Customer.



Customer Birth Month

This query returns active and valid Customers whose birth month matches your selection ([DEFAULT] = "January").

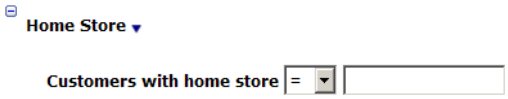
- **Customer Birth Month** - Month of the Customer's birthdate.



Home Location

This query returns active and valid Customers whose Home Location matches your entry. The Home Location you enter must be a valid location for your organization.

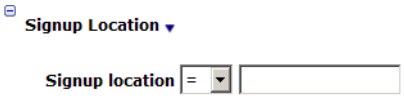
- **Customers with home location** - Home location of the Customer.



Signup Location

This query returns all Customers whose signup location (location) matches the one you specify. The location you enter must be a valid location for your organization.

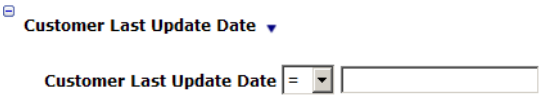
- **Signup Location** - Location ID of the location where the Customer signed up.



Customer Last Update Date

This query returns active and valid Customers whose last update date matches what you have entered. The date must be a valid date.

- **Customer Last Update Date** - Date of the last update of the Customer record.



Signup Date

This query returns active and valid Customers whose signup date matches what you have entered. The date must be a valid date.

- **Customer sign-up date** - Date the Customer signed up.

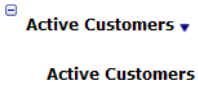


Create Date

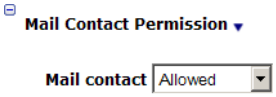
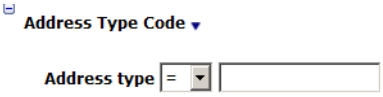
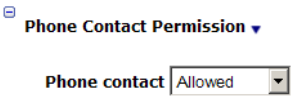
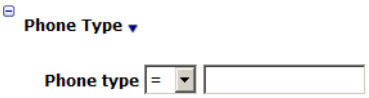
This query returns active and valid Customers whose create date matches what you have entered. The date must be a valid date.

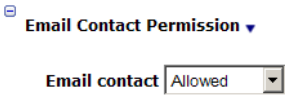
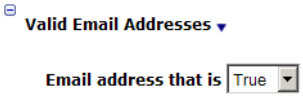
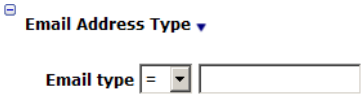
- **Customer creation date** - Date the Customer record was created.



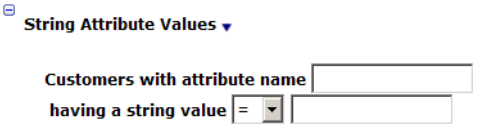
Active Customers	This query returns **all** active and valid Customers. This query has no parameters to configure. 

Customer Contact

Mail Contact Permission	This query returns all Customers who have given permission to be contacted by mail. ■ **Mail contact** - The mail contact permission for the Customer. The options are **Allowed** [DEFAULT] and **Not Allowed**. 
Address Type Code	This query returns all Customers whose address type matches what you entered. ■ **Address Type Code** - The type of address. 
Phone Contact Permission	This query returns all Customers who have given permission to be contacted by telephone. ■ **Phone Contact Permission** - The phone contact permission for the Customer. The options are Allowed [DEFAULT] and Not Allowed. 
Phone Type	This query returns all Customers whose phone type matches your selection. ■ **Phone Type** - The type of phone. 

Email Contact Permission	This query returns all Customers who have given permission to be contacted by email. ■ **Email Contact Permission** - The email contact permission for the Customer. The options are Allowed **[DEFAULT]** and Not Allowed. 
Valid Email Addresses	This query returns all Customers whose email address has been validated or not validated. ■ **Valid Email Addresses** - Whether the email address has been validated. Your options are True **[DEFAULT]** or False. 
Email Address Type	This query returns all Customers whose email type matches your selection. ■ **Email Address Type** - The type of email address. 

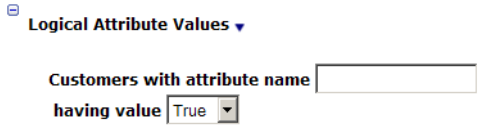
Customer Attributes

String Attribute Values	This query returns all Customers with a string attribute whose value matches your entry. ■ **Customers with attribute name** - The name of the string attribute. ■ **having a string value** - The value of the string. 

Logical Attribute Values

This query returns all Customers with a logical attribute that has been assigned the selected value.

- **Customers with attribute name** - The name of the logical attribute.
- **having value** - The value of the attribute. Your options are True **[DEFAULT]** or False.



Date Attribute Values

This query returns all Customers with a date attribute that has been assigned a date between the entered values.

- **Customers with attribute name** - The name of the date attribute.
- **having dates between X and Y** - The range of date values to include in the results.

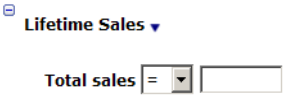


Purchase Activity

Lifetime Sales

This query returns all Customers whose lifetime sales amount matches what you have entered.

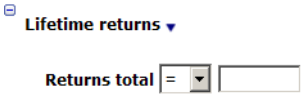
- **Total sales** - The amount of lifetime sales. The amount must be an integer between 0 and 1,000,000.

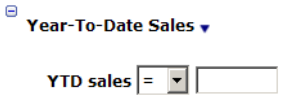
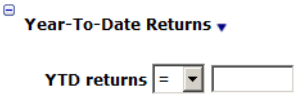
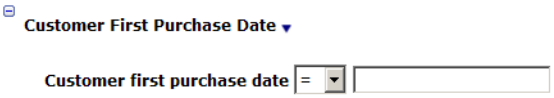
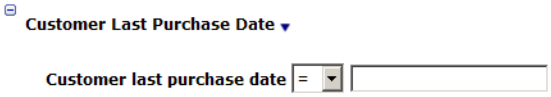


Lifetime Returns

This query returns all Customers whose lifetime returns amount matches what you have entered.

- **Returns total** - The amount of lifetime returns. The amount must be an integer between 0 and 1,000,000.



Year-To-Date Sales	This query returns all Customers whose year-to-date sales amount matches what you have entered. ■ **YTD Sales** - The amount of sales in the year to date. The amount must be an integer between 0 and 1,000,000. 
Year-To-Date Returns	This query returns all Customers whose year-to-date returns amount matches what you have entered. ■ **YTD returns** - The amount of returns in the year to date. The amount must be an integer between 0 and 1,000,000. 
Customer First Purchase Date	This query returns active and valid Customers whose first use date matches the date criteria entered. The date must be a valid date. ■ **Customer first purchase date** - The first purchase date for the Customer. 
Customer Last Purchase Date	This query returns active and valid Customers whose last use date matches the date criteria entered. The date must be a valid date. ■ **Customer last purchase date** - The date of the most recent purchase by the Customer. 

Number of Visits Between Dates

This query returns all active Customers who made x visits between the dates specified. Both dates must be filled in and valid.

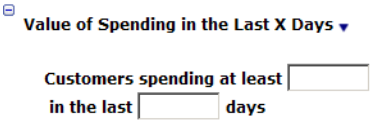
- **Number of visits** - The number of visits. Must be a whole number (integer) between 0 and 120.
- **between the dates of** - The first date in the range.
- **and** - The last date in the range. This date **must** come after the first date.



Value of Spending in the Last X Days

This query returns all the Customers who have spent a designated amount or more within the last X number of days.

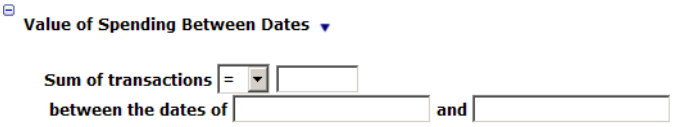
- **Customer spending at least** - The minimum amount spent.
- **in the last X days** - The number of days in the past for which to look for Customers who spent the minimum amount.

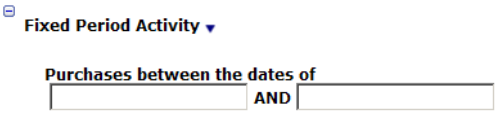
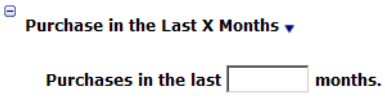
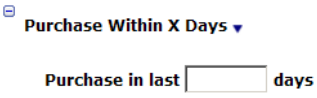
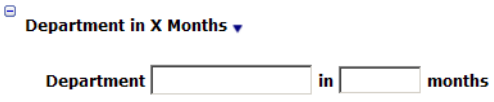


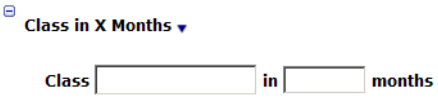
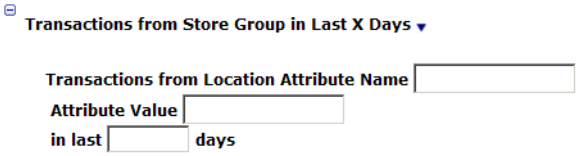
Value of Spending Between Dates

This query returns all the Customers who have spent a designated amount or more within a designated range of dates.

- **Sum of transactions** - The amount of the transactions.
- **between the dates of** - The first date in the range.
- **and Y** - The end date of the range. This date **must** come after the first date.



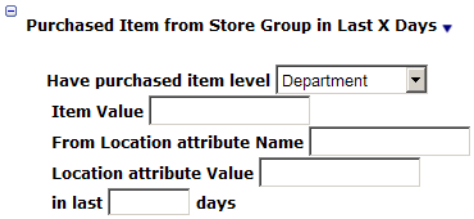
Fixed Period Activity	This query returns active and valid Customers who have completed transactions between the business dates you have specified. Both dates must be filled in and valid. ■ **Purchases between the dates of** - The first date in the range. ■ **AND** - The end date of the range. This date **must** come after the first date. 
Purchase in the Last X Months	This query returns all Customers who have made a purchase within the number of months you specify. ■ **Purchases in the last** - The number of months in the range. The number of months must be an integer between 0 and 120. 
Purchase within X Days	This query returns all Customers who have made a purchase within the number of days you specify. ■ **Purchase in last** - The number of days in the range. You must enter an integer between 0 and 3600. 
Department in X Months	This query returns all Customers who have made a purchase from Department X within Y months. ■ **Department** - The Department ID of the Department. The ID can be for any valid Department in your organization. ■ **in** - The number of months in the range. The number of months must be an integer between 0 and 3600. 

Class in X Months	This query returns all Customers who have purchased an item in the class you specified in the last X months. ■ **Class** - The Class ID of the Class. The ID can be for any valid Class in your organization. ■ **in** - The number of months in the range. The number of months must be an integer between 0 and 3600. 
Returns in X Days	This query returns active and valid Customers who have made one or more returns in the number of days you have specified. ■ **Purchases returned in** - The number of days in the range. You must enter a number between 0 and 1000. 
Transactions from Location Group in last X Days	This query returns the list of Customers who have performed a transaction at a location within a configured location group in the last X days. ■ **Transactions From Location Attribute Name** - The name of the location attribute used for the group. ■ **Attribute Value** - The value of the Location Attribute. This field cannot be left blank. ❑ Entries must be inside single quotes (e.g. 'VALUE'). ❑ If entering multiple values, separate values with a comma (e.g. 'VALUE1', 'VALUE2'). ■ **in last X Days** - The number of days for which to search for matching Customers. Must be a whole number between 1 and 3600. 

Purchased Item from Location Group in Last X Days

This query returns Customers who have purchased one or more items from a location within a location group in the last X days.

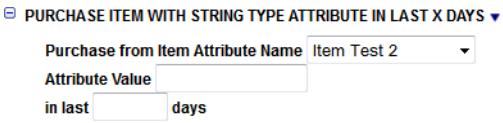
- **Have purchased item level** - Item level to be searched for the Item Value (see below).
- **Item Value** - Value to use for the item level. Entries must be inside single quotes. If entering multiple values, separate values with a comma. This field cannot be left blank.
- **From Location attribute Name** - The name of the location attribute used for the group.
- **Location attribute Value** - The value of the Location Attribute.
- **in last X Days** - The number of days for which to search for matching Customers. Must be a whole number between 1 and 3600.



Purchased Item with String Type Attribute in Last X Days

This query returns Customers who have purchased, within the last X days, an Item assigned a certain string-type Item Attribute with an indicated value.

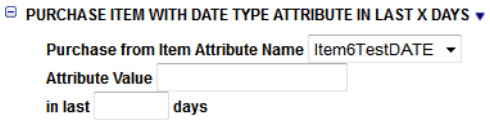
- **Purchase from Item Attribute Name** - Attribute to be searched for the Attribute Value (see below).
- **Attribute Value** - Value set for the Attribute.
- **in last X days**- The number of days for which to search for matching Customers. Must be a whole number between 1 and 3600.



Purchased Item with Date Type Attribute in Last X Days

This query returns Customers who have purchased, within the last X days, an Item assigned a certain date-type Item Attribute with an indicated value.

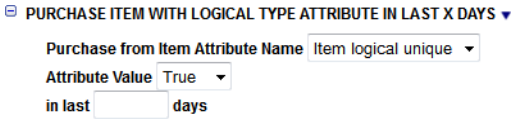
- **Purchase from Item Attribute Name** - Attribute to be searched for the Attribute Value (see below).
- **Attribute Value** - Value set for the Attribute.
- **in last X days**- The number of days for which to search for matching Customers. Must be a whole number between 1 and 3600.



Purchased Item with Logical Type Attribute in Last X Days

This query returns Customers who have purchased, within the last X days, an Item assigned a certain logical-type Item Attribute with an indicated value.

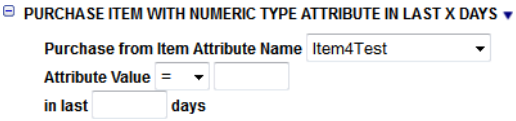
- **Purchase from Item Attribute Name** - Attribute to be searched for the Attribute Value (see below).
- **Attribute Value** - Value set for the Attribute.
- **in last X days**- The number of days for which to search for matching Customers. Must be a whole number between 1 and 3600.



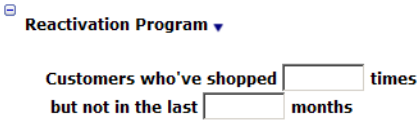
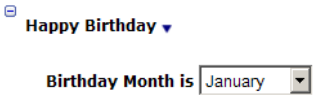
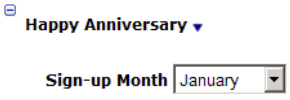
Purchased Item with Numeric Type Attribute in Last X Days

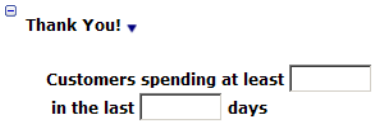
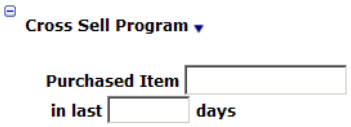
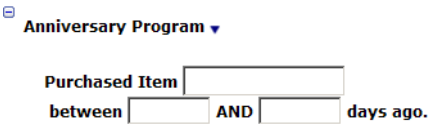
This query returns Customers who have purchased, within the last X days, an Item assigned a certain numeric-type Item Attribute with an indicated value.

- **Purchase from Item Attribute Name** - Attribute to be searched for the Attribute Value (see below).
- **Attribute Value** - Value set for the Attribute.
- **in last X days**- The number of days for which to search for matching Customers. Must be a whole number between 1 and 3600.



Basic Programs

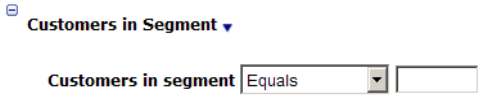
Big Spenders	This query returns all active Customers who have spent at least X dollars in at least Y visits. The amount spent must be a number between 0 and 1,000,000. The number of visits must be a number between 0 and 999. 
Reactivation Program	This query returns active and valid Customers who have shopped X times but not in the last Y months. The number of times shopped must be a number between 0 and 1000 and the number of months must be a number between 0 and 120. 
Happy Birthday	This query returns all active Customers who have a valid address, have given permission to be contacted by mail, and whose birthday is in the month you selected (**[DEFAULT]** = **January**). 
Happy Anniversary	This query returns all active Customers who have a valid address, have given permission to be contacted by mail, and whose signup date is in the month you selected (**[DEFAULT]** = **January**). 

Thank You!	This query returns active and valid Customers who have spent at least X dollars in the last Y days. The amount spent must be a number between 1 and 1,000,000 and the number of days must be a number between 1 and 1000 (i.e. 100 dollars in the last 30 days). 
Cross Sell Program	This query returns active and valid Customers who have purchased item X in the last Y days. The number of days must be a number between 1 and 1000. 
Big Spender - Location	This query returns active Customers who have spent at least X dollars in location Y. The amount spent must be a number between 0 and 1,000,000. The location can be any valid location in your organization. You can only specify one (1) location. 
Anniversary Program	This query returns active Customers who have purchased item X between Y and Z days ago. The **Purchased Item** can be any valid item in your organization. The first number of days (Y) must be an integer between 0 and 1000 and the second number of days (Z) must be an integer between 1 and 1000. 

Segment Elements

Customers in Segment

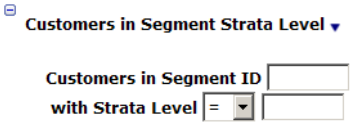
This query returns all Customer who are in the Segment ID specified.



Customers in Segment Strata Level

This query returns all Customers in a specified strata level within a Segment.

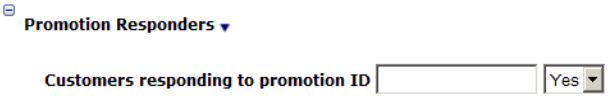
- **Customers in Segment ID** - The ID for the segment.
- **with Strata Level** - The ID for the strata level within the segment.



Promotion Activity

Promotion Responders

This query returns all active Customers who have responded to the promotion specified (if **Yes** is selected in the dropdown selection) or not responded to the promotion (if **No** is selected). The promotion can be any valid promotion in your organization.

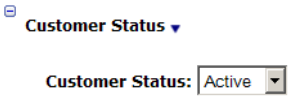
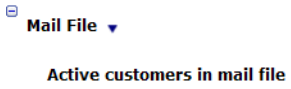
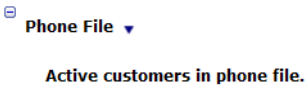
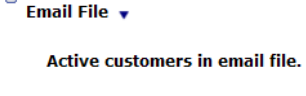


Campaign Responders

This query returns all active Customers who have responded to the campaign specified (if **Yes** is selected in the dropdown selection) or not responded to the campaign (if **No** is selected). The campaign can be any valid campaign in your organization.



Strategic Segments

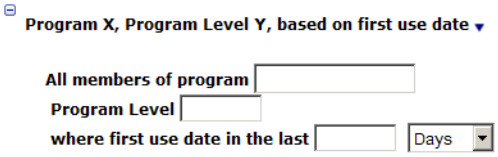
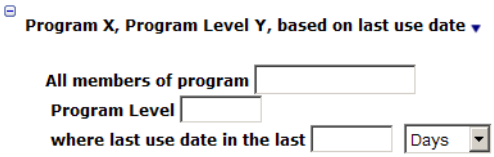
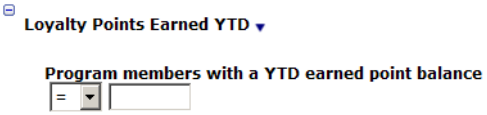
Customer Status	This query returns valid Customers whose status matches the one you have selected. Your options are "Active" **[DEFAULT]** and "Inactive". 
Mail File	This query returns all active Customers who have given permission to be contacted by mail and have a valid address. 
Mail File By Home Location	This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by mail, and have a valid address. 
Phone File	This query returns all active Customers who have given permission to be contacted by telephone and have a valid telephone number that is not their Fax number. 
Phone File By Home Location	This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by phone, and have a valid telephone number that is not their Fax number. 
Email File	This query returns all active Customers who have given permission to be contacted by email and have a valid email address. 

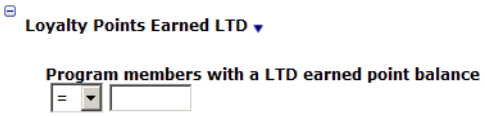
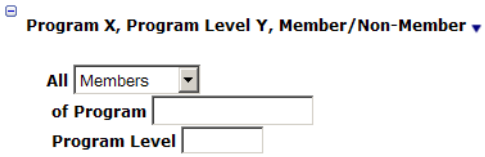
Email File By Home Location	This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by email, and have a valid email address. 

Loyalty Segments

In the following queries, you can find the Program IDs by selecting **Account -> Card Definition** from the Application Menu. The resulting list page will list the Programs. Within the Card Definition, select the Card Prefix associated with the Program; Relate will then display the associated Programs and Program IDs.

You can find the Level ID by selecting a Loyalty Program from the Program List page (see previous paragraph) and clicking **Edit-Level**. The resulting page will list the levels along with their Level IDs for the selected program.

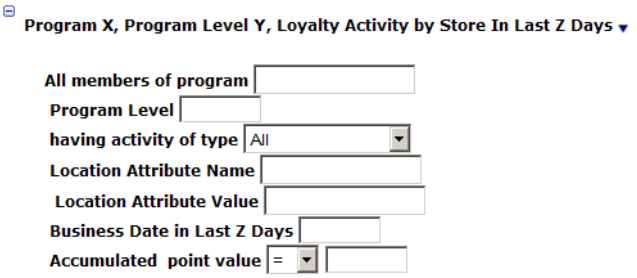
Program X, Program Level Y, based on First Use Date	This query returns all active Customers who participate in Program X at Level Y and who first used their Loyalty Account within the last Z Days **[DEFAULT]**, Weeks, or Months. 
Program X, Program Level Y, based on Last Use Date	This query returns all active Customers who participate in Program X at Level Y and who last used their Loyalty Account within the last Z Days **[DEFAULT]**, Weeks, or Months. 
Loyalty Points Earned YTD	This query returns all Customers whose year-to-date earned points balance matches the entered data. 

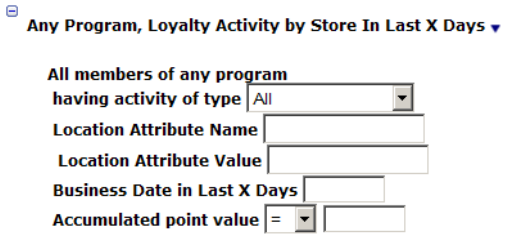
Loyalty Points Earned LTD	This query returns all Customers whose lifetime-to-date earned points balance matches the entered data. 
Any Program, Member/Non-Member	This query returns all Customers who have Cards/accounts that are or are not part of any Loyalty Program. 
Program X, Program Level Y, Member/Non-Member	This query returns all Customers who have Cards/accounts that are part of Program X and Program Level Y. Program Level Y must be an integer between 0 and 99999. 

Program X, Program Level Y, Loyalty Activity by Location in Last Z Days

This query returns all active Customers who have Cards/accounts that are part of Program X and Program Level Y **and** who have a loyalty transaction of the type indicated from the location indicated (Location Attribute Name and Value) within the last number of days indicated **and** whose Loyalty Point total matches your selection.

- **All members of program** - ID for the loyalty program
- **Program Level** - ID for the program level.
- **having an activity of type** - The type of transaction.
- **Location Attribute Name** - The name of a location attribute used by the location.
- **Location Attribute Value** - The value of the location attribute.
- **Business Date in Last Z Days** - The number of days previous in which to look for the indicated activity at the indicated location.
- **Accumulated Point value** - The number of loyalty points currently accumulated by the Customer. Must be an integer.

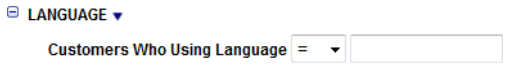
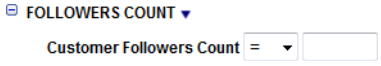
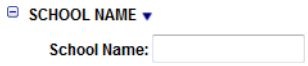
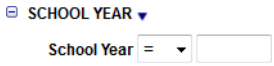
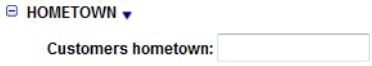


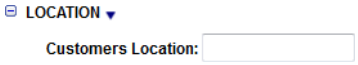
Any Program, Loyalty Activity by Location in Last X Days	This query returns all Customers who have Cards/ accounts that are part of any Program **and** who have a loyalty transaction of the type indicated from the location indicated (Location Attribute Name and Value) within the last number of days indicated, **and** whose Loyalty Point total matches your selection. ■ **All members of any program having activity of type** - The type of transaction. ■ **Location Attribute Name** - The name of a location attribute used by the location. ■ **Location Attribute Value** - The value of the location attribute. ■ **Business Date in Last X Days** - The number of days previous in which to look for the indicated activity at the indicated location. ■ **Accumulated Point value** - The number of loyalty points currently accumulated by the Customer. Must be an integer. 

Social Networks

Facebook	This query returns all Customers with a social profile for Facebook. This query has no additional parameters. 
Twitter	This query returns all Customers with a social profile for Twitter. This query has no additional parameters. 

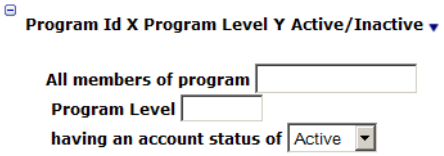
Social Profiles

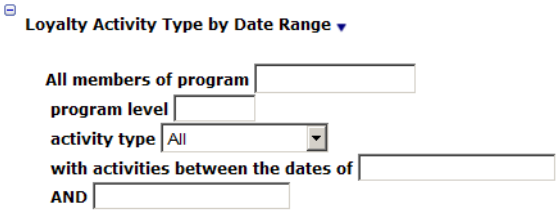
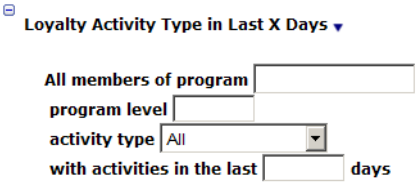
Language	This query returns all Customers who are using the selected language, as specified in their social profile. ■ **Customer Who Using Language** - The language code. 
Friends Count	This query returns the Customers with a defined number of friends, as specified in their social profile. ■ **Customer Friends Count** - The number of friends. 
Followers Counts	This query returns the Customers with a defined number of followers in their social profile. ■ **Customer Friends Count** - The number of followers. 
School Name	This query returns the all Customers who attended a specified school in their social profile. ■ **School Name** - The name of the school. 
School Year	This query returns all Customers with a specified graduation date, as specified in their social profile. ■ **School Year** - The year of graduation. 
Hometown	This query returns all Customers with a specified hometown, as specified in their social profile. ■ **Customers hometown** - Name of the hometown. 

Gender	This query returns all Customers with a specified gender, as specified in their social profile. ■ **Customers Gender** - Gender of the customer. 
Location	This query returns all Customers living certain location, as specified in their social profile. ■ **Customers Location** - Customer location. 

Strata Queries

Loyalty Summary

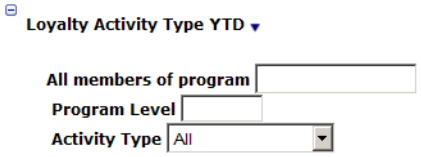
Program Id X Program Level Y Active/Inactive	This query returns all the Customers who are members of a Program at a certain Program Level who are either Active or Inactive. ■ **All members of Program** - The Program to which the members belong. ■ **Program Level** - The Program Level to which the members belong. ■ **having an account status of** - Determines whether the members must be Active or Inactive. 

Loyalty Activity Type by Date Range	This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within a specified date range. ■ **All members of Program** - The Program to which the members belong. ■ **Program Level** - The Program Level to which the members belong. ■ **activity type** - The activity performed. ■ **with activities between dates of** - The beginning of the date range. ■ **AND** - The end of the date range. 
Loyalty Activity Type in Last X Days	This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within a certain number of days in the past. ■ **All members of Program** - The Program to which the members belong. ■ **Program Level** - The Program Level to which the members belong. ■ **activity type** - The activity performed. ■ **with activities in the last** - The number of days in the past for the range. 

Loyalty Activity Type YTD

This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within the year to date.

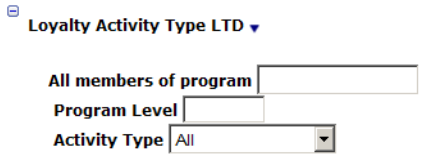
- **All members of Program** - The Program to which the members belong.
- **Program Level** - The Program Level to which the members belong.
- **Activity Type** - The activity performed.



Loyalty Activity Type LTD

This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within the lifetime to date of the account.

- **All members of Program** - The Program to which the members belong.
- **Program Level** - The Program Level to which the members belong.
- **Activity Type** - The activity performed.



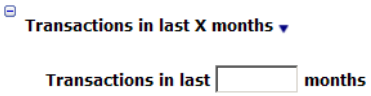
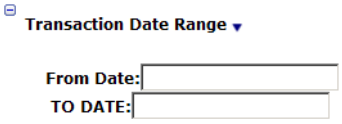
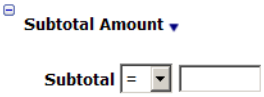
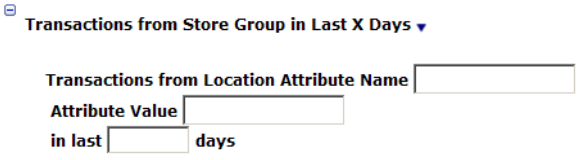
Transaction Criteria

Location

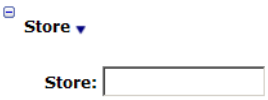
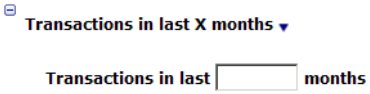
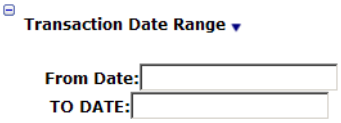
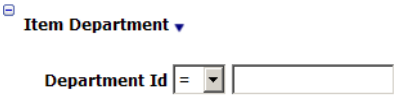
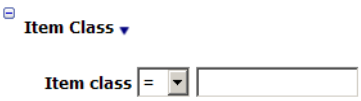
This query returns the list of Customers who performed a transaction at a certain location.

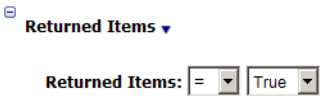
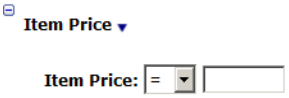
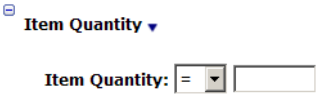
- **Location** - Location ID of the location.



Transactions in last X months	This query returns the list of Customers who performed a transaction within a certain number of days in the past. ■ **transactions in the last** - The number of months in the past for the range. 
Transaction Date Range	This query returns the list of Customers who performed a transaction within a certain date range. ■ **From Date:** - The beginning of the date range. ■ **TO DATE:** - The end of the date range. 
Subtotal Amount	This query returns the list of Customers who have had a subtotal of a certain, defined value. ■ **Subtotal** - The amount of the subtotal. 
Transaction from Location Group in Last X Days	This query returns the list of Customers who have performed a transaction at a location within a configured location group in the last X days. ■ **Transactions From Location Attribute Name** - The name of the location attribute used for the group. ■ **Attribute Value** - The value of the Location Attribute. ■ **in last X Days** - The number of days for which to search for matching Customers. Must be a whole number between 1 and 3600. 

Line Item Detail

Location	This query returns the list of Customers who performed a transaction at a certain location location. ■ **Location** - Location ID of the location. 
Transactions in last X months	This query returns the list of Customers who performed a transaction within a certain number of days in the past. ■ **transactions in the last** - The number of months in the past for the range. 
Transaction Date Range	This query returns the list of Customers who performed a transaction within a certain date range. ■ **From Date:** - The beginning of the date range. ■ **TO DATE:** - The end of the date range. 
Item Department	This query returns the list of Customers who performed a transactions containing an item belonging to a certain item department. ■ **Department Id** - The Department ID of the item department. 
Item Class	This query returns the list of Customers who performed a transaction containing an item belonging to a certain item class. ■ **Item class** - The Class ID of the item class. 

Item Style	This query returns the list of Customers who performed a transaction containing an item belonging to a certain item style. ■ **Style Id** - The Style ID of the item style. 
Returned Items	This query returns the list of Customers who have either returned or not returned items in a transaction. ■ **Returned Items:** - Whether or not items were returned in the transaction. 
Item Price	This query returns the list of Customers with a transaction containing an item of a certain price. ■ **Item Price:** - The price of an item. 
Item Quantity	This query returns the list of Customers with a transaction containing a certain quantity of any item. ■ **Item Quantity:** - The item quantity. 
Item Id	This query returns the list of Customers who performed a transaction containing a certain item. ■ **Item Id** - The Item ID of the item. 

Purchased Item from Location Group in Last Y Days	This query returns the list of Customers who purchased an item within a certain set of items, from a certain set of locations, within a certain number of days in the past. ■ **Have purchased item level** - The item level to which the item(s) belongs. ■ **Item Value** - The ID of the Item Level to which the item(s) belongs. ■ **From Location attribute name** - Name of the Location attribute. ■ **Location attribute Value** - The value the Location must have to belong to the set of Locations. ■ **in last** - The number of days in the past within which the item must have been purchased. 