Oracle® Retail Customer Engagement Cloud Service (Relate)

Release Notes

Release 11.4

March 2015

ORACLE®

Oracle® Retail Customer Engagement Cloud Service (Relate), Release Notes, Release 11.4

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Release Overview

This document contains the release notes for Relate 11.4. These release notes cover new features and enhancements for this version, and the resolved issues that were identified in previous versions.

	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.

! Important!

Relate now supports authentication for the WSDL and XMLAPI interfaces. Authentication is enabled by default. *If authentication is enabled, EXISTING INTEGRATIONS WITH RELATE WILL NO LONGER WORK. See Secure WSDL and XMLAPI Services [CRM-1252] for more information.*

Features

This section includes brief summaries of some of the more significant enhancements and new features for Relate 11.4.

Franchise Items [CRM-876]

As part of the franchise support in Relate, items can now be assigned to a franchise.

Franchise Deal Items [CRM-877]

When a user associated with a franchisee creates a deal, the user can only assign items assigned to that franchisee.

Franchise Promotions [CRM-878]

When viewing the results of promotions, a franchisee will only have access to promotions in which they took part; this includes franchise-specific promotions and company-wide promotions.

Instant Awards [CRM-1093]

Customers can now receive, and be notified of, earned awards immediately after a transaction completes. The POS system must connect with version 3.1 of the Loyalty Account Services WSDL to use this feature. *The customer will not be informed directly at the point of service; the notification only occurs after the POSLog transaction information has been processed.*

Secure WSDL and XMLAPI Services [CRM-1252]

Relate web services will require message-level user authentication when this feature is enabled. *This feature is enabled by default. Existing integrations will need to have this feature disabled.*

Certified Platforms

The Relate 11.4 release is supported on the following platforms:

Application Server Operating System

- Windows Server 2008 R2 SP1 running a 64-bit Java Virtual Machine
- OpenSuse version 12.3

Database Server Software

- MS SQL Server 2012 SP1 (running on Windows Server 2008 R2 SP1)
- Oracle 11gR2 – Release 11.2.0.2 (running on Windows Server 2012 or OpenSuse 12.3)

Web Browsers

- Internet Explorer 9
- Internet Explorer 10
- Firefox

Issue Resolution

The following list summarizes the corrective actions for previously detected issues:

Category	Ref #	Description
Segment	CRM-932	When a user associated with only one franchise creates a segment, the system automatically selects the franchise for the segment.
Promotion	CRM-967	When viewing promotion details, the Export/Approve Status section is fully visible.
Segment	CRM-1061	When editing a customer segment with the Publish to Task Generator option selected, the remaining checkboxes on the screen are grayed out.
Segment	CRM-1235	Actions buttons are always available on the screen when editing a segment.
Tasks	CRM-1239	Relate displays a message when the user enters a subject line that exceeds the maximum number of characters.
Customer	CRM-1334	When merging customers based on telephone numbers, Relate includes all the telephone number types from the merged records in the new record when the ACCEPT_ALL option is used.
Customer	CRM-1335	When merging customers based on email address, Relate includes all the email address types from the merged records in the new record when the ACCEPT_ALL option is used.
Promotion	CRM-1357	Paging options in the Promotion list are always available.

Known Issues

For a list of the known issues in this version of Relate, please contact your Oracle project manager.

Roles and Configurations

The following list summarizes new User Roles and Conflate configurations that will affect the Relate user. This list is not intended to be comprehensive.

Role/Configuration	Description
New Configurations	
Relate Services UI Connector Port	Determines the port on which Tomcat listens for user interface requests.
Override General Database Configuration	Determines whether Relate™ will override the general database configuration with a database configuration specific to this organization.
Database Vendor	Specifies the organization-specific type of database used to store the Relate data.
JDBC Database Host	Specifies the organization-specific JDBC server name for the database.
JDBC Database Name	Specifies the organization-specific Java Database Connectivity (JDBC) name of the database.
JDBC Database Port	Specifies the organization-specific JDBC port for the database.
JDBC MSSQL Instance Name	Specifies the organization-specific instance of SQL Server used by Relate.
JDBC MSSQL Pass String Parameters as Unicode	Determines whether string parameters are sent to the database using Unicode characters for the organization.
JDBC Username	Specifies the organization-specific JDBC username.
JDBC Password	Specifies the organization-specific JDBC password.
Quartz tablename prefix	Specifies the organization-specific prefix used by Quartz tables in the Relate database.
Service Authentication Scheme	Determines the authentication scheme Relate will use to validate the user making a web service request.
Task Generator Job Batch Size	Specifies the number of records processed before persisting these objects to the database during the Task Generator Job.
Franchise Record Limit	Defines the maximum number of records that can be shown in the franchise table.
Enable Immediate Awards	Determines whether immediate awards are enabled in Relate.
Location Promotion Export File Extension	File extension for the location-level promotion transform file.
Removed Configurations	
ESP Folder Access Roles	ESP Data Extension Fields Properties File
Enable Email Service Provider Integration	ESP Data Extension Folder Name
Email Service Provider WSDL Endpoint URI	ESP Offer Export Template

Role/Configuration	Description
ESP WSDL Username	ESP Transform File
ESP WSDL Password	Email Send Data Extract Directory
Email Service Provider	ESP download data extract file retry interval
ESP FTP Username	ESP download data extract file retry count
ESP FTP Password	ESP FTP connection retry count
ESP Import CSV Task Status Polling Interval	Enable Promote Integration
Modified Configurations	
Promotion Delete Transform List	Changed default to `XstoreDeletePromotion.bsh.java`.
Location Promotion Transform Export Type	Changed valid values to `ORGANIZATION_FLAT`, `ORGANIZATION_STORE`, `PROMOTION_FLAT`, and `PROMOTION_STORE`

Task Type Codes	Changed default values to:
	
	`TASK_TYPE_CODES.1=APPOINTMENT,0`
	
	`TASK_TYPE_CODES.2=TODO,0`
	
	`TASK_TYPE_CODES.3=EVENT,0`
	
	`TASK_TYPE_CODES.4=ADMIN,0`

Documentation

The following documentation for Relate 11.4 will be available on or about the date indicated.

Document Title	Rev #	Release Date	Description
Relate Version 11.4 Release Notes	1.0	March 20, 2015	The Relate Release Notes describe the new features in the release, as well as resolved issues.
Batch Processing and Web Services Guide	1.0	March 20, 2015	The *Relate Batch Processing and Web Services Guide* provides users with information, examples, and guidelines needed to compose both XML request messages and batch file request messages for the Relate application.
Configuration Guide	1.0	March 20, 2015	The *Relate Configuration Guide* provides a description of the Relate configuration tool as well as instructions, requirements, and information concerning the configuration of the Relate application and database. The settings include both those set at the time of installation and those that may be changed at a later date.
Database Dictionary	1.0	March 20, 2015	The *Relate Database Dictionary* provides users with a description of the Relate database tables, fields, relationship diagrams, and default data.

Document Title	Rev #	Release Date	Description
Implementation Guide (Installer Version)	1.0	March 20, 2015	The Installer version of the *Relate Implementation Guide* provides step-by-step instructions, requirements, and information for a typical installation, setup, and configuration of the Relate application using the Relate Installer.
Implementation Guide (Manual Version)	1.0	March 20, 2015	The Manual version of the *Relate Implementation Guide* provides step-by-step instructions, requirements, and information for a typical installation, setup, and configuration of the Relate application with the raw files, rather than through an installer program.
User Guide	1.0	March 20, 2015	The *Relate User Guide* provides the end user instructions/details on how to use the web interfaces to the CRM Server. It aids the user by describing information required to perform an operation, what the information is used for (if necessary), and how different pieces of information interact with each other (if necessary).