

**Oracle[®] Retail Customer
Engagement Cloud Service
(Relate)**
User Guide
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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

Oracle 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.

The screenshot shows a login form with the following elements:

- Text: "Please login" (blue)
- Text: "Username" followed by an input field
- Text: "Password" followed by an input field
- Text: "Login" (button)

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.

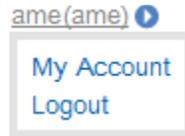


Figure 1-2: User Options Menu

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.

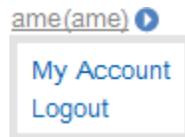
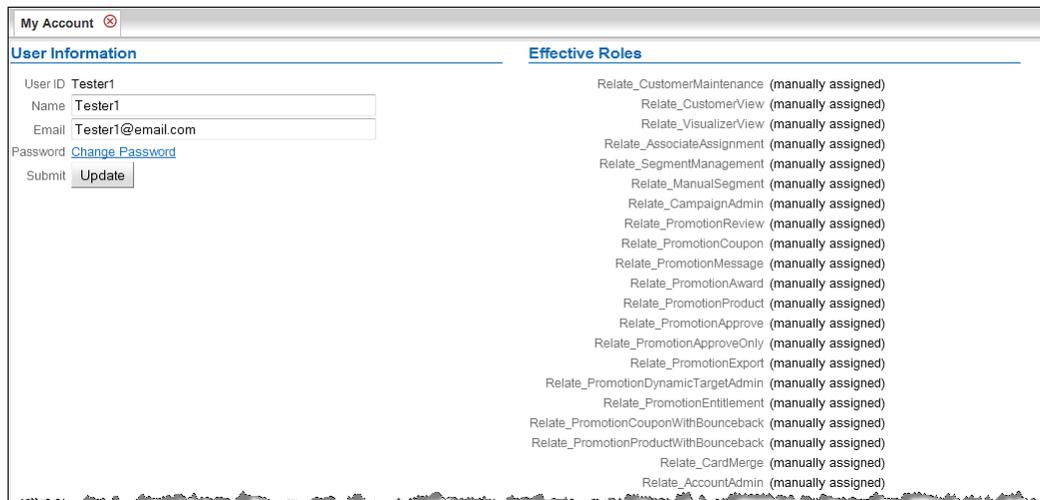


Figure 1-3: User Options Menu

2. Click **MY ACCOUNT**.

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



The screenshot shows a web interface titled "My Account" with a close button. It is divided into two main sections: "User Information" and "Effective Roles".

User Information:

- User ID: Tester1
- Name: Tester1
- Email: Tester1@email.com
- Password: [Change Password](#)
- Submit:

Effective Roles:

- Relate_CustomerMaintenance (manually assigned)
- Relate_CustomerView (manually assigned)
- Relate_VisualizerView (manually assigned)
- Relate_AssociateAssignment (manually assigned)
- Relate_SegmentManagement (manually assigned)
- Relate_ManualSegment (manually assigned)
- Relate_CampaignAdmin (manually assigned)
- Relate_PromotionReview (manually assigned)
- Relate_PromotionCoupon (manually assigned)
- Relate_PromotionMessage (manually assigned)
- Relate_PromotionAward (manually assigned)
- Relate_PromotionProduct (manually assigned)
- Relate_PromotionApprove (manually assigned)
- Relate_PromotionApproveOnly (manually assigned)
- Relate_PromotionExport (manually assigned)
- Relate_PromotionDynamicTargetAdmin (manually assigned)
- Relate_PromotionEntitlement (manually assigned)
- Relate_PromotionCouponWithBounceback (manually assigned)
- Relate_PromotionProductWithBounceback (manually assigned)
- Relate_CardMerge (manually assigned)
- Relate_AccountAdmin (manually assigned)

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.

[Tester1 \(Tester1\)](#) 

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.

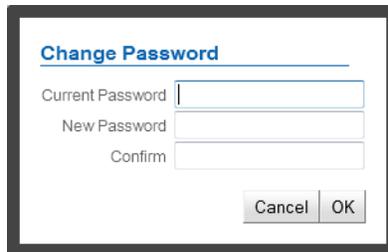


Figure 1-6: Change Password Window

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).

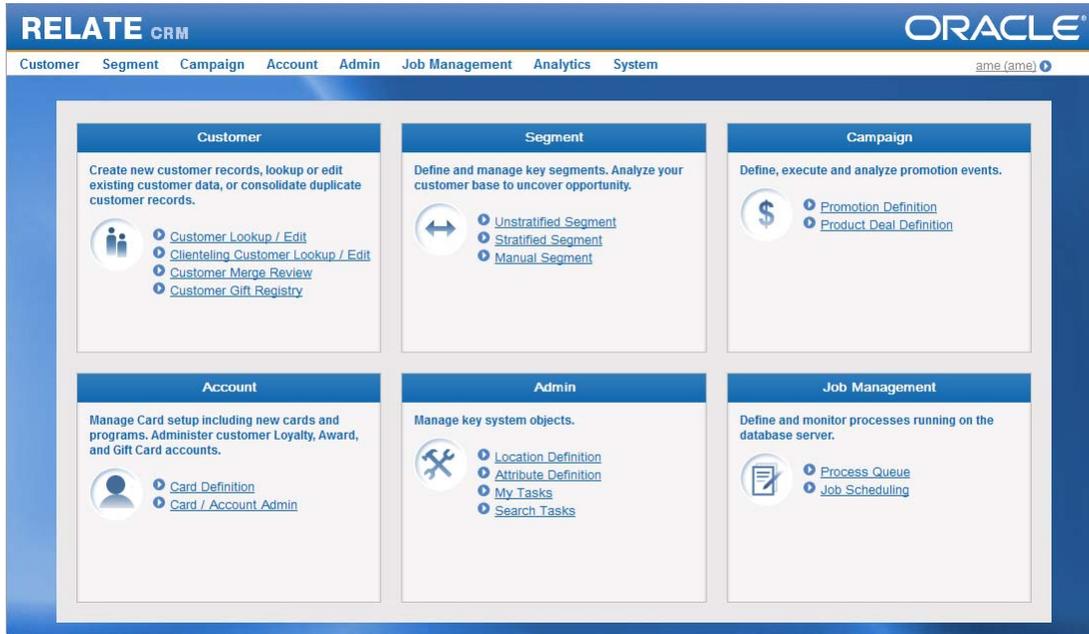


Figure 1-8: Main Page

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.

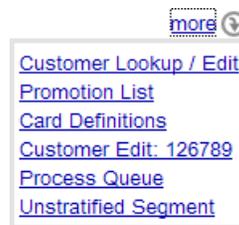


Figure 1-11: Tab List

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.

User Label	<input type="text"/>
Email	<input type="text" value="hj@xyx.com"/>

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.

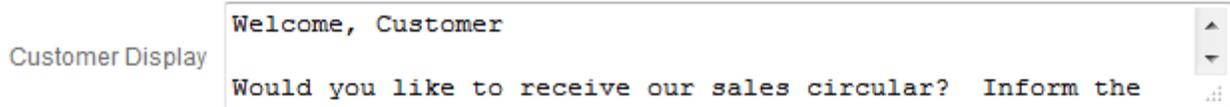


Figure 1-13: Text Area Field

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.



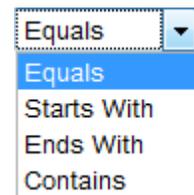
Figure 1-14: Selection Menus

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:

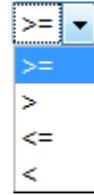
- Equals** - The data must match the information in the [Text Field](#) exactly.
- Starts With** - The data must begin with the information in the [Text Field](#).
- Ends With** - The data must end with the information in the [Text Field](#).
- Contains** - The data can have the information in the [Text 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.

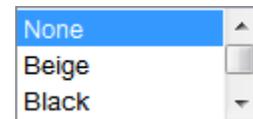


To use Time Menus, select the hour of the time in the first menu, the minute of the time in the second menu and select either AM or PM in the third menu.

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.

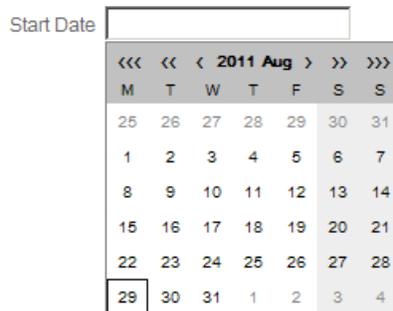


Figure 1-17: Calendar Menu

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.

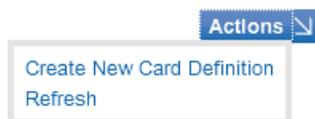


Figure 1-18: Actions Menu

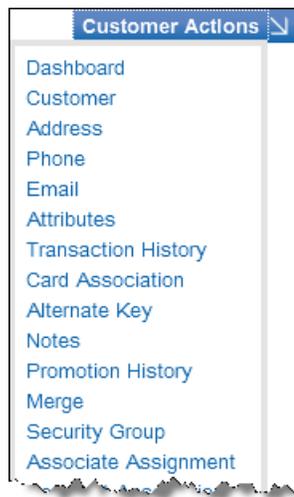


Figure 1-19: Customer Actions Menu



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
1224	DynamicPromo	DynamicPromo	Product	2014 Dec 27	2015 Jan 4	Yes	Saved	No
1223	testDynamicPromo	testDynamicPromo	Product	2014 Dec 25	2015 Jan 4	Yes	Saved	No
1222	Holiday Closeout Promotion	Holiday Closeout Promotion	Product	2014 Nov 19	2015 Nov 13	Yes	Saved	No
1221	Holiday Closeout Promotion	Holiday Closeout Promotion	Product	2014 Nov 19	2015 Nov 27	Yes	Saved	No
1220	Holiday Closeout Promotion	Holiday Closeout Promotion	Product	2014 Nov 19	2015 Nov 28	Yes	Clear	No
1219	Promo 54444 ETL-new	Promo 54444 ETL-new	Entitlement	2014 Aug 1	2014 Nov 21	N/A	Conflict	No
1218	test-random	test-random	Product	2014 Jul 29	2014 Jul 31	Yes	Saved	No
1217	test	test	Product	2014 Jul 15	2014 Jul 31	Yes	Saved	No
1216	NewEntitlement	NewEntitlement	Entitlement	2014 Jul 15	2014 Jul 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](#).

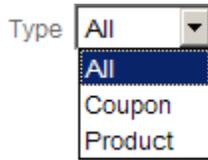


Figure 1-22: [Selection Menu Filter](#)

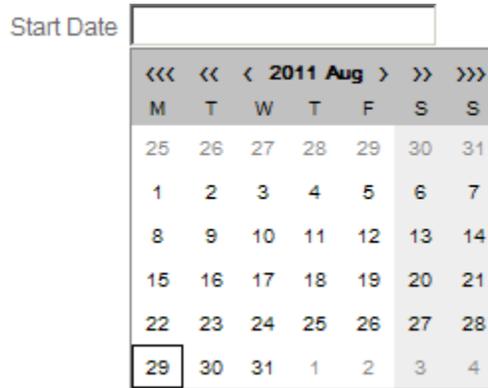


Figure 1-23: [Calendar Menu Filter](#)

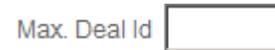


Figure 1-24: [Text Field Filter](#)

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:

- Displaying: 1-50 of 273
Record Numbers - Indicates the range of records displayed on the current [List](#) page.

- ⏪ ⏩ 1 of 6 Pages ⏪ ⏩

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: [] GO
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: 50 ▾ items
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.

Award - Edit  Award - Edit	Programs ▶ Award: Award - Edit	Status Series Defined 0 Card Prefix 03549 Generated Series 0 User Org Count 0 Total Cards 0 Active Yes	▶
ALW Gift Card0411-1  ALW Gift Card 0411-1	Programs ▶ Tender: ALW 0411-1	Status Series Defined 1 Card Prefix 04111 Generated Series 1 User Org Count 0 Total Cards 30 Active Yes	▶
ALWCard-3  ALW Gift Card 3	Programs ▶ Loyalty: Loyalty 0414-2 ▶ Tender: ALW Program 3	Status Series Defined 0 Card Prefix 04113 Generated Series 0 User Org Count 0 Total Cards 0 Active Yes	▶

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 (▶).

Card Def: ALWCard-3 ▶ Loyalty Program: Loyalty 0414-2 ▶ Level: Loyalty 0414-2

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.

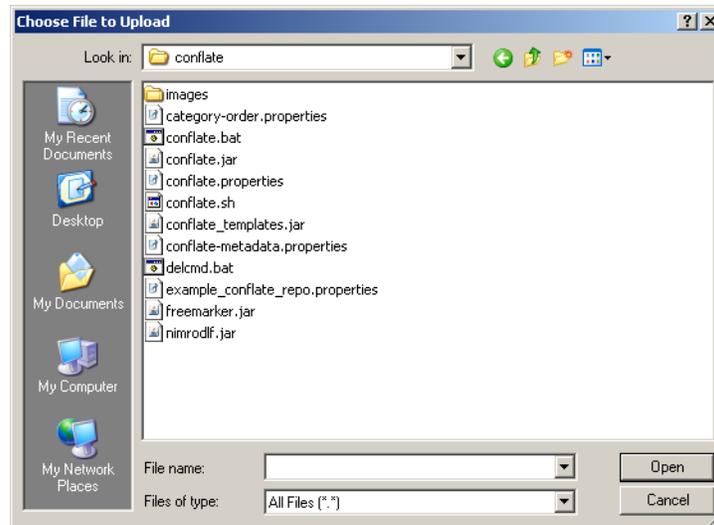


Figure 1-29: Choose File to Upload

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.

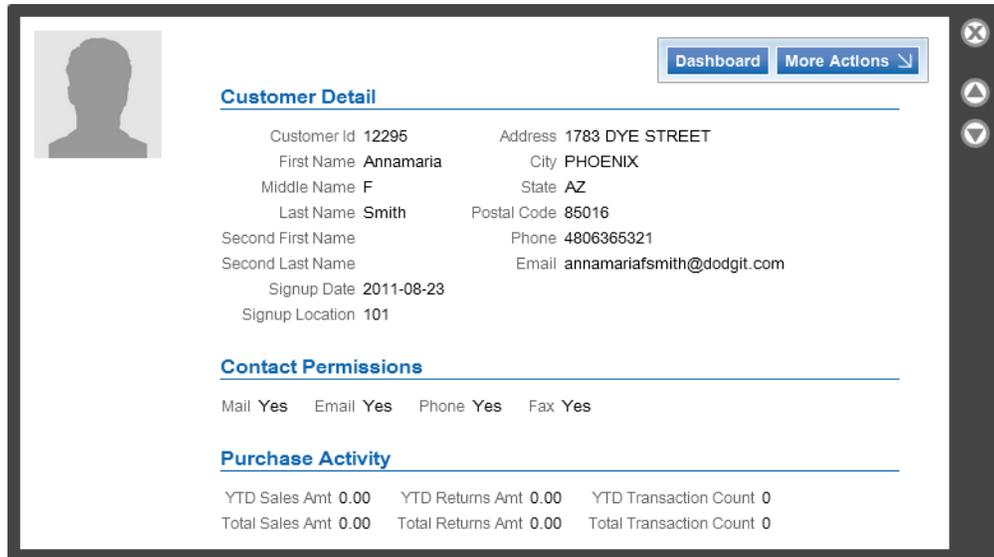
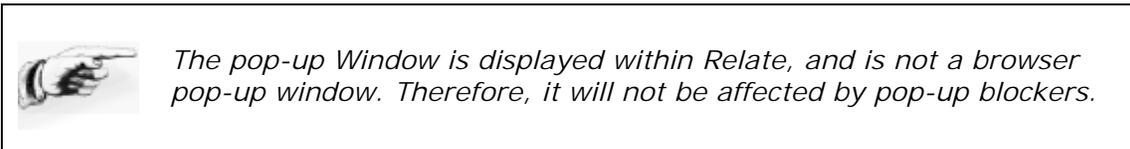


Figure 1-30: Window



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.

The screenshot shows the 'Search User' window with the following elements: a title bar 'Search User', a 'Field' dropdown menu set to 'Name', an 'Operations' dropdown menu set to 'Equals', a 'Value' text input field, an 'Add' button, and a row of three buttons: 'Search', 'Cancel', and 'OK'.

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.

The screenshot shows the 'Search User' window with two search criteria fields. The first field has 'Field' set to 'Email', 'Operations' set to 'Equals', and 'Value' set to 'mail'. The second field has 'Field' set to 'Name', 'Operations' set to 'Equals', and 'Value' is empty. There are 'Add' buttons for each field and a 'Delete' button for the second field. The 'Search', 'Cancel', and 'OK' buttons are at the bottom right.

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](#).

The screenshot shows the 'Search User' window. At the top, there is a search configuration area with 'Field' set to 'Email', 'Operations' set to 'Contains', and 'Value' set to 'mail'. There are 'Add', 'Search', 'Cancel', and 'OK' buttons. Below this is a table of search results:

User ID	Name	Email
sammy206	sammy206	sammy206@mail.com
Sierra	Sierra	sierra@email.com
tester	tester	tester@email.com
user301	user301	user301@email.com

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.

The screenshot shows the 'Search Customer' window. It has a search configuration area with 'Field' set to 'First Name', 'Operations' set to 'StartsWith', and an empty 'Value' field. There are 'Add', 'Search', 'Cancel', and 'OK' buttons.

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.

The screenshot shows a search interface titled "Search Customer". It contains two search criteria rows. The first row has "Field" set to "First Name", "Operations" set to "Equals", and "Value" set to "Veronica". The second row has "Field" set to "First Name", "Operations" set to "StartsWith", and "Value" set to an empty text box. There are "Add", "Delete", "Search", "Cancel", and "OK" buttons.

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.

The screenshot shows the same search interface as Figure 1-35, but with the search results displayed in a table below. The table has columns for Customer Id, First Name, Last Name, City, State, and Home Location. The search criteria are now "First Name" equals "Veronica" and "Last Name" starts with "H".

Customer Id	First Name	Last Name	City	State	Home Location
23320	Veronica	Hardman	SHELBY	NC	188
9565	Veronica	Held	PHILADELPHIA	PA	188
34734	Veronica	Huston	LINCOLN	NE	188
37684	Veronica	Holbrook	CHARLESTON	WV	188

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.

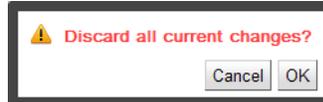


Figure 1-38: Confirmation Prompt

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.

Location Attributes	Value	Enabled	
STORE_ID	0022	<input checked="" type="checkbox"/>	And
High Volume	YES	<input checked="" type="checkbox"/>	
Add			
Or			
Location Attributes	Value	Enabled	
STORE_ID	0034	<input checked="" type="checkbox"/>	
Add			
Add Group(s)			

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 Franchisee support is enabled and the element using the Location Eligibility Rule is associated with one or more Franchisees, the search results will only show the Locations associated with the selected Franchisee(s).

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

- Click a search result item to select it.



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

- 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:

- Click the Location Eligibility Rule.
A menu opens displaying a list of options.
- 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.

Target Name	Segment Name	Customer Count
LG New customers		34
	LG New customers	34
	Add	

Target Name	Segment Name	Customer Count
Purch last 21 days		191
	Purch last 21 days	191
	Add	

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.

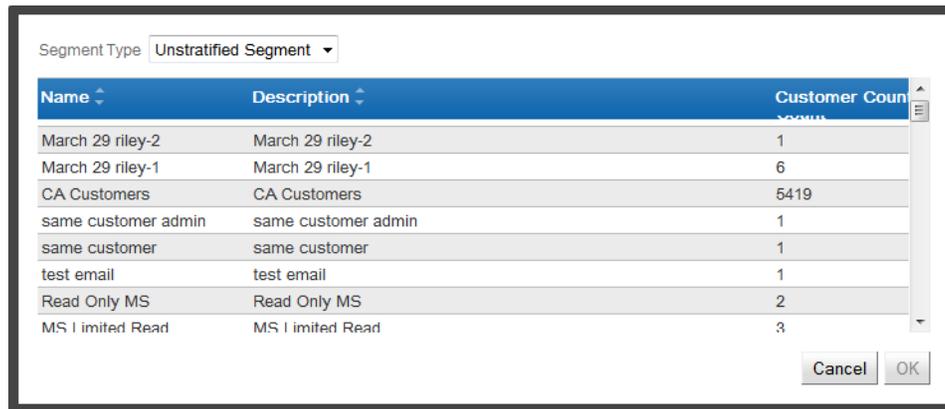


Figure 1-43: Segment Eligibility Window

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:

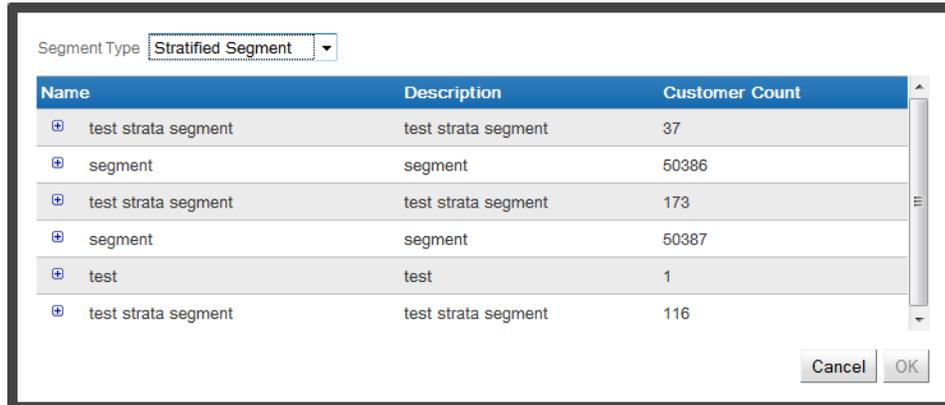


Figure 1-44: Stratified Segments

- 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.

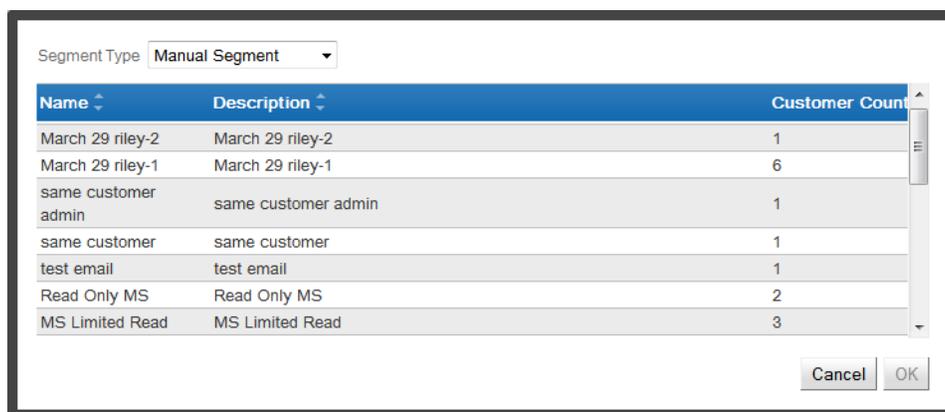


Figure 1-46: Manual Segments

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 60](#) to 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.

Hierarchy Id	Name	Description
925	Accessory Department	Accessory Department
950	Shoe Department	Shoe Department
975	Beauty/Fragrance Department	Beauty/Fragrance Department

Figure 1-48: Item Selection Window - Search Results



If Franchisee support is enabled and the element using the Item Eligibility Rule is associated with one or more Franchisees, the search results will only show the Locations associated with the selected Franchisee(s).

5. Click an item in the search result [List](#) to select it.



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

- 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:

- 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.

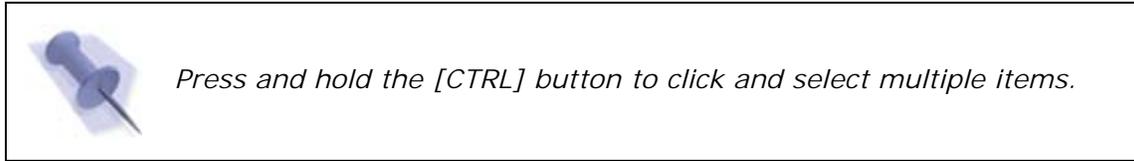
Figure 1-49: Item Selection Window

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.



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

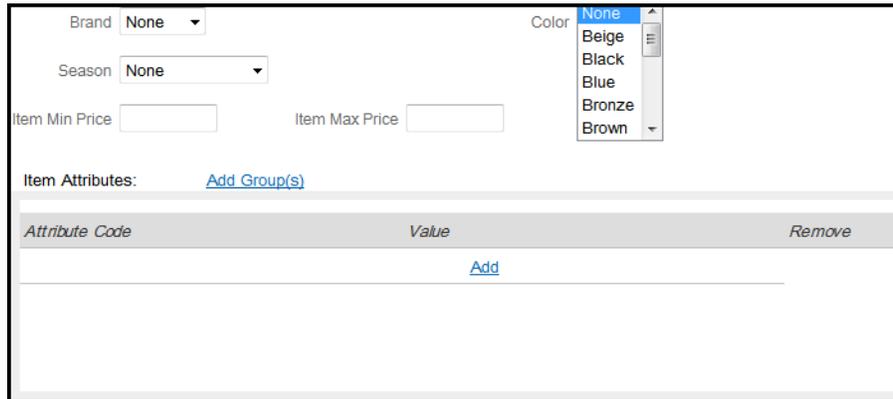


Figure 1-51: Item Hierarchy Search - Filters

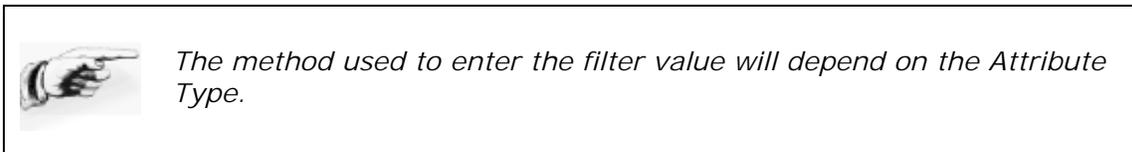
- ❑ **Brand** - Use this [Selection Menu](#) to indicate whether the item should have a brand name attached to it. Select **None [DEFAULT]** to not filter by brand.
 - ❑ **Season** - Use this [Selection Menu](#) to indicate the season of the item. Select **None [DEFAULT]** to not filter by season.
 - ❑ **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.

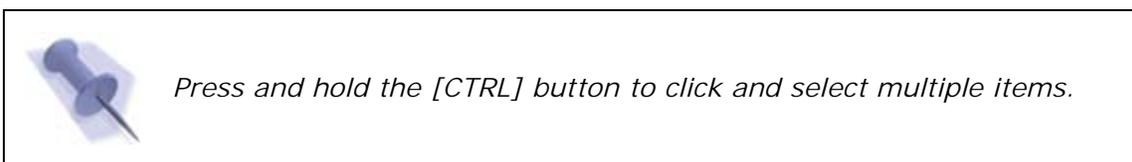


- d. If necessary, click the **Remove** [Link](#) to remove an Attribute from a Group.
- e. If necessary, repeat steps a-c for each Attribute to include in the Group.
8. If necessary, click the **Add Group(s)** [Link](#) to add another Group, then repeat step 7 to add Attributes to the Group.
9. Click 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.



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

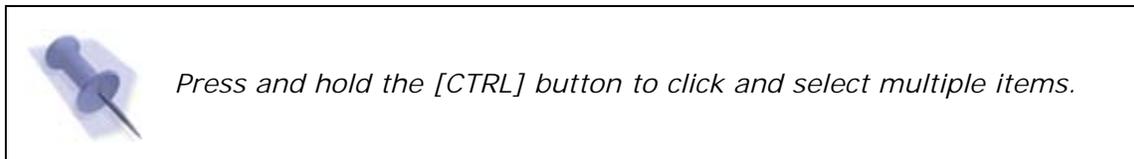
2. Culinary items can be added either by Item Hierarchy, or by Item ID search.
 - ❑ Add Items by Attribute:
 - 1) Click the **Add Link** in the Category Rule Definition area.
 - 2) An Attribute Code entry line opens.
 - 3) Select the Attribute Code for the Item in the [Selection Menu](#).

- 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.

Item Id	Description
66001	Paper Plates
66002	Paper Bowls
66003	Paper Cups
66004	Paper Napkins

- 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.



- 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.



2. Click **Remove**.

A confirmation prompt opens.

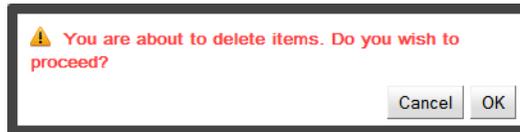


Figure 1-55: Delete Item Eligibility Rule Confirmation

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.

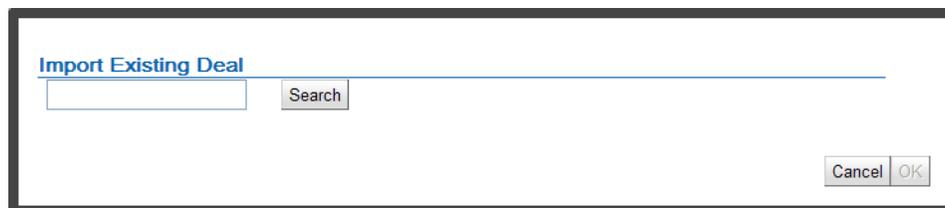
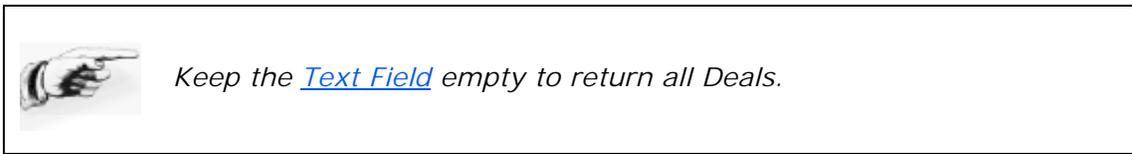


Figure 1-57: Import Existing Deal Window

- Enter the search terms for the Deal in the [Text Field](#).



- Click the **Search** button.
A [List](#) of Deals matching the search criteria is displayed.

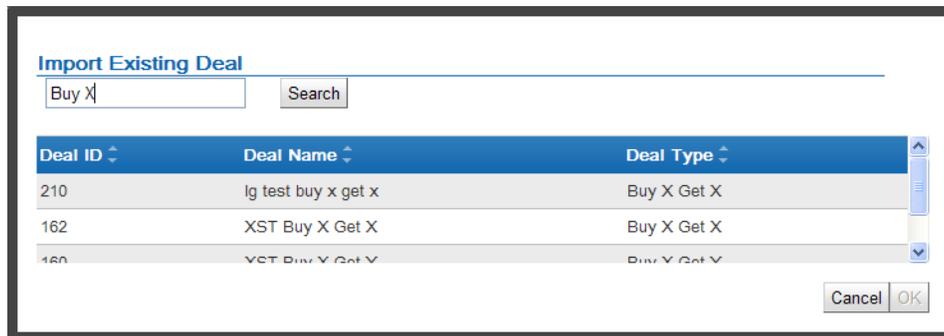


Figure 1-58: Search Results Returned

- Click a Deal to select it. Press and hold the [CTRL] button to select multiple items.
- 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.

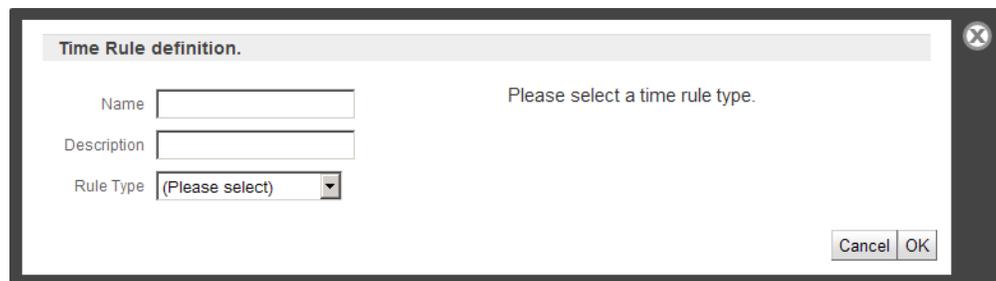


Figure 1-59: Time Rule Definition Window

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.

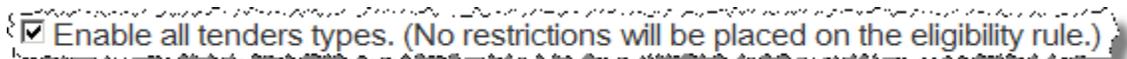


Figure 1-61: Enable All Tender Types Check Box

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

<input type="checkbox"/> Enable all tenders types. (No restrictions will be placed on the eligibility rule.)	
Tender Types	ID
<input type="checkbox"/> Account Credit	ACCOUNT_CREDIT
<input type="checkbox"/> Accounts Receivable	ACCOUNT_RECEIVABLE
<input type="checkbox"/> American Express cards	AMERICAN_EXPRESS
<input type="checkbox"/> American Express Credit Card	AMERICAN_EXPRESS
<input type="checkbox"/> Canada Cash	CAD_CURRENCY
<input type="checkbox"/> 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.

Customers

Overview

Customer records store basic information about each Customer. These records can be associated with a Card or account 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 160](#) describes Customer validation rules in Relate.

Customer Lookup/Edit

Use the Customer Lookup/Edit page to search for and modify Customer information stored in Relate.



This is different from a [Clienteling Search](#), which searches for a set of Customers that meet certain, specified criteria.

Customer Lookup

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.

Customer Lookup / Edit [Close]

Search [Search] Actions [Dropdown]

Search Criteria =
 First Name Starts With [a] Last Name Equals [Jones]

Search Results
 Displaying: 1-35 of 35 1 of 1 Pages Go To Page: [GO] Page Size: 50 Items

Customer Id	First Name	Last Name	Address	City	State
10709	Augustine	Jones	1500 PURSGLOVE COURT	ANSONIA	OH
10739	Annette	Jones	772 EVERETTE ALLEY	FT LAUDERDALE	FL
11746	Ann	Jones	1841 KELLY DRIVE	CHARLESTON	WV
13167	Anthony	Jones	268 JERRY TOTH DRIVE	KODIAK	AK
13687	Asa	Jones	4028 EAGLE LANE	GREENBUSH	MN
14209	Alicia	Jones	369 COURT STREET	CHESTERFIELD	MO
14803	Anita	Jones	71 FRANK AVENUE	SPRINGFIELD	MA
16363	Alfred	Jones	4457 AUSTIN AVENUE	SAVANNAH	GA
18910	Alvin	Jones	697 PATTON LANE	DURHAM	NC
20672	Ashley	Jones	458 ARRON SMITH DRIVE	HONOLULU	HI
20846	Anita	Jones	1384 WATER STREET	SAN FRANCISCO	CA

Figure 2-2: Customer Search Results List

Customer List

The Customer [List](#) is accessed through the [Customer Lookup](#) process.

Customer Lookup / Edit [Close]

Search [Search] Actions [Dropdown]

Search Criteria =
 First Name Starts With [a] Last Name Equals [Jones] ← 1

Search Results
 Displaying: 1-35 of 35 1 of 1 Pages Go To Page: [GO] Page Size: 50 Items

Customer Id	First Name	Last Name	Address	City	State
10709	Augustine	Jones	1500 PURSGLOVE COURT	ANSONIA	OH
10739	Annette	Jones	772 EVERETTE ALLEY	FT LAUDERDALE	FL
11746	Ann	Jones	1841 KELLY DRIVE	CHARLESTON	WV
13167	Anthony	Jones	268 JERRY TOTH DRIVE	KODIAK	AK
13687	Asa	Jones	4028 EAGLE LANE	GREENBUSH	MN
14209	Alicia	Jones	369 COURT STREET	CHESTERFIELD	MO
14803	Anita	Jones	71 FRANK AVENUE	SPRINGFIELD	MA
16363	Alfred	Jones	4457 AUSTIN AVENUE	SAVANNAH	GA
18910	Alvin	Jones	697 PATTON LANE	DURHAM	NC
20672	Ashley	Jones	458 ARRON SMITH DRIVE	HONOLULU	HI
20846	Anita	Jones	1384 WATER STREET	SAN FRANCISCO	CA

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	<p>Customer List - A List of Customers currently in the system that match the search criteria.</p> <p>This List includes the following information for each Customer:</p> <ul style="list-style-type: none"> ■ 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.

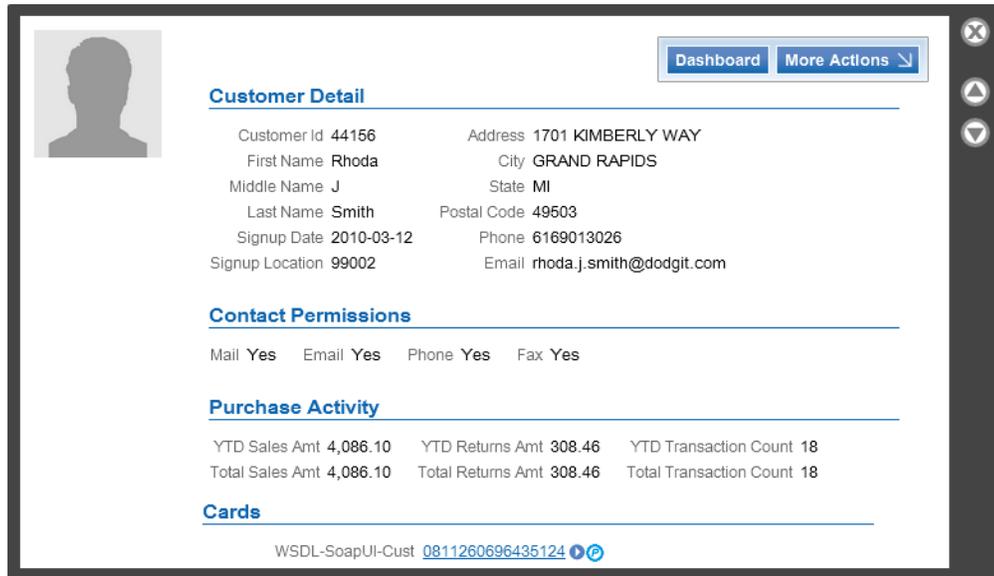


Figure 2-4: Customer Summary Window

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 515](#).
 - 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 one of the following procedures:

- [“Customer Lookup” on page 70](#)
- [“Clienteling Search” on page 164](#)
- [“Gift Registry Lookup” on page 176](#)

Customer Lookup / Edit | Customer Edit: 10202

Print | Customer Actions

Dr Bobbie S Haskell 3rd
4000 SIXTH ROAD
IDYLWOOD, KS

Customer Detail

Customer Id: 10202 | Create Date: 2013-04-11
Create User Id: SoapUIUser | Update Date: 2010-09-17
Update User Id: SoapUIUser | Source: Walkin
Phone: 6548691690 | Email: euqxvva@kiwbavpjyw.com

Card Detail

WSDL-SoapUI-TestCase-Cust: 1817229069419003

Customer [edit](#)

Business Name: Mammoth Pictures	Gender: Female	Net Worth: 135,330.00	Signup Store: 99200
Organization Name: Mammoth Pictures	Education Level: PHD	Rent No	Signup Date: 2010-10-17
Organization Type: FoodService	Marital Status: MARRIED	Class: FOODSERVICE	Home Store: 99201
Birth Date: 2002-11-09	Ethnicity: BLACK	Language: EN	Prospect: Yes
Birth Month	Annual Income: 211,000.00	Source: Walkin	Owner ID
Anniversary			

Purchase Activity

First Transaction Date: 2013-01-14	Total Sales Amount: 2,043.05	YTD Sales Amount: 2,043.05
Last Transaction Date: 2013-01-24	Total Sales Item Count: 28	YTD Sales Item Count: 28
Total Profit Percent: 24.10%	Total Returns Amount: 154.23	YTD Returns Amount: 154.23
YTD Profit Percent: 24.10%	Total Returns Item Count: 4	YTD Returns Item Count: 4
	Total Transaction Count: 9	

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](#).

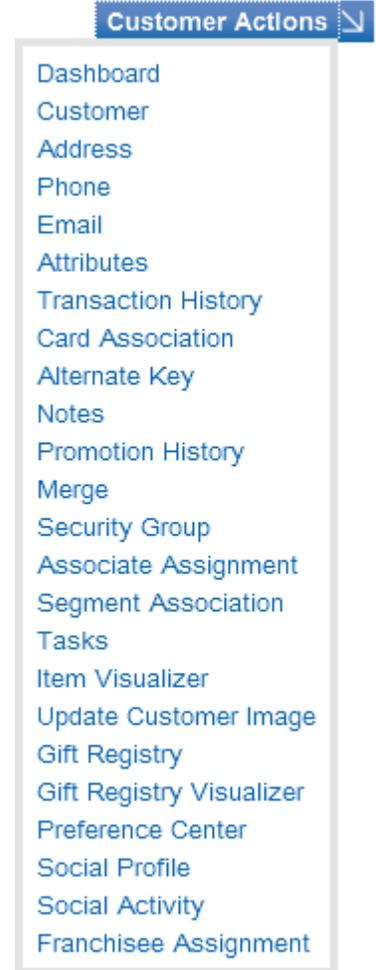
Many of the sections have an **edit Link** next to the section name. Click the **edit Link** to edit the information/data in that section.

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 Number” 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 151](#)).
- ❑ **Social Profile** - View the Social Profiles associated with the Customer (see [“Social Profile” on page 156](#)).
- ❑ **Social Activity** - View the social media posts made by the Customer (see [“Social Activity” on page 158](#)).
- ❑ **Franchisee Assignment** - View or edit the Franchisees to whom the Customer has been assigned (see [“Franchisee Assignment” on page 159](#)).

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 (P) 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 opens.



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 515](#).

Customer Data

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

 A screenshot of the 'Customer Data' section in a dashboard. It shows a grid of customer information including business name, gender, net worth, education level, marital status, ethnicity, annual income, and more.

Customer edit							
Business Name	ConferenceCrasher.com	Gender	Female	Net Worth	110,000.00	Signup Location	99002
Organization Name	ConferenceCrasher.com	Education Level	PHD	Rent	No	Signup Date	2010-03-12
Organization Type	Wholesaler	Marital Status	SINGLE	Class	WHOLESALE	Home Location	77777
Birth Date	1973-08-20	Ethnicity	WHITE	Language	EN	Prospect	Yes
Birth Month		Annual Income	155,000.00	Source	Walkin	Owner ID	
Anniversary							

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.

Purchase Activity					
First Transaction Date	2011-03-15	Total Sales Amount	70.99	YTD Sales Amount	0.00
Last Transaction Date	2011-03-15	Total Sales Item Count	2	YTD Sales Item Count	0
Total Profit Percent	45.09%	Total Returns Amount	0.00	YTD Returns Amount	0.00
YTD Profit Percent	0.00%	Total Returns Item Count	0	YTD Returns Item Count	0
		Total Transaction Count	1		

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.



Associate Assignments edit				
Primary	Role	Location	Associate	Locked
Yes	Fine Jewelry	100	Alex	No
No	Accessories			
No	Sportwear & Summer Gear			

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.



Addresses edit				
Address	Type	Primary	User Label	Contact Permission/Opt In
72 RATTLESNAKE DR LAS VEGAS, NV, 89116	HOME	Yes		

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.

Email	Type	Primary	User Label	Contact Permission/Opt In	Format Preference
bbarker@email.com	HOME	Yes			HTML

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.

Phone Number	Type	Primary	User Label	Contact Permission/Opt In
7415670824 Ext 561	BUSINESS	Yes		NO PHONE CONTACT

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.

Group	Name	Value	Description
Counts for Customer	Number of Pets	3	Number of Pets
	CUSTOMER_GROUPS	26	CUSTOMER GROUPS

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.

Alternate Keys
WR_SHOPPER_ID 1002878
WR_CUST_ID 110223
XSTORE_CUST_ID 110223
XSTORE_ID 110223

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.

Program	Type	Account Number	Program Level	Balance	YTD Points	LTD Points
2011 Loyalty LOY2	loyalty	1569	2011 LOY2 - Test Level 1	336.96	336.96	336.96
2011 Loyalty Test LOY3	loyalty	1570	2011 Test LOY3 level 1	337.00	337.00	337.00

Figure 2-15: Cards/Accounts Section

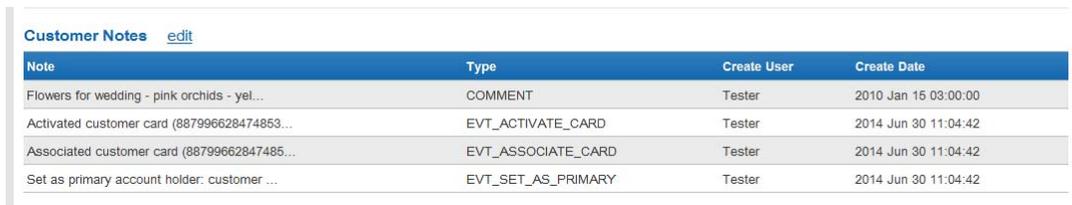
The following information is displayed for each Card:

- **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.



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 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.

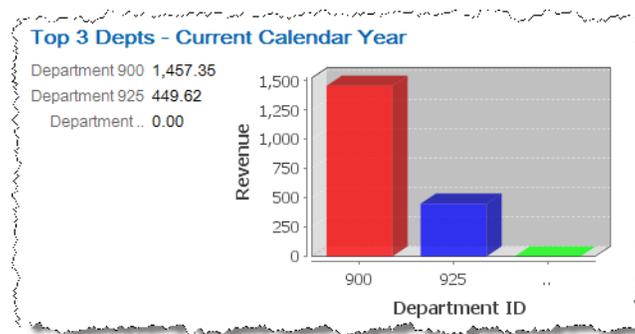


Figure 2-18: Top 3 Depts - Current Calendar Year

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.

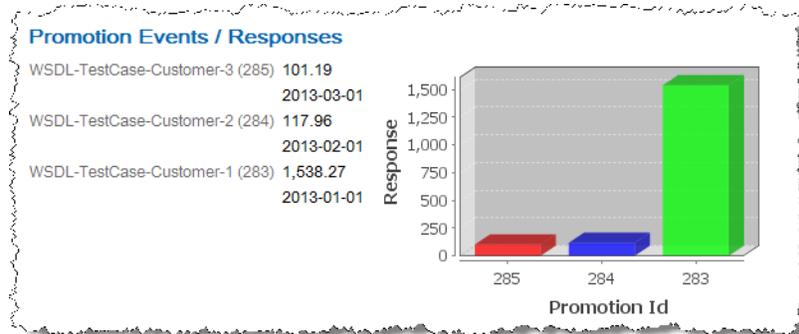


Figure 2-19: Promotion Events/Responses

Preference Centers

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

Preference 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.



Social Media Type	Profile Name	Profile	Exp. Date
	Susan Relate		2014-01-02
	susanrelate		

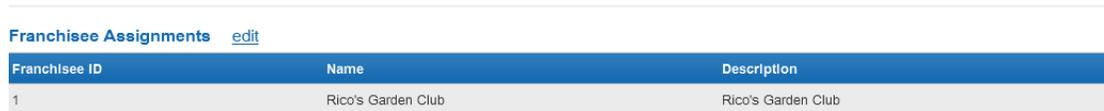
Figure 2-21: Social Profile Section

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.



Franchisee ID	Name	Description
1	Rico's Garden Club	Rico's Garden Club

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.

Customer

Language: JA - Japanese Class: FOODSERVICE Prospect:

Prefix: Ms
 First Name: Mary B
 Middle Name: B
 Last Name: Smith
 Suffix: IV
 Business Name:
 Organization Name:
 Organization Type:
 Birth Date: 1972-10-16
 Anniversary:
 Gender: Female
 Education Level: GRADUATE
 Marital Status: UNKNOWN
 Ethnicity: ASIAN
 Annual Income: 140000
 Net Worth: 95000
 Owner ID:
[Search Owner](#) [Remove Owner](#)

Signup Location / Home Location
[Signup Location](#) 99901
[Home Location](#) 77777

Contact Permissions
 Mail Email
 Phone Fax

Rent
 Rent

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](#).

User ID	Name	Email
sammy206	sammy206	sammy206@mail.com
Sierra	Sierra	sierra@email.com
tester	tester	tester@email.com
user301	user301	user301@email.com

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.



The screenshot displays the 'Address Screen' for a customer named Happy Jones. At the top, there are buttons for 'Add Address' and 'Customer Actions'. The customer's name and address are shown: Happy Jones, 10100 SUNSHINE LANE, CLEVELAND, OH. Below this, there are two sections: 'Customer Detail' and 'Card Detail'. The 'Customer Detail' section includes fields for Customer Id (126789), Create Date (2009-03-25), Create User Id (Relate), Update Date (2011-09-08), Update User Id (Household job), Source, Phone (3332221111), and Email (happy@xyz.com). The 'Card Detail' section shows MK Card (8700100915675563). Below these details is a table titled 'Address' with columns: Primary, Address Seq, Address Type, Address Line 1, City, State, Postal Code, and Contact Permission/Opt In. The table contains two rows of address data.

Primary	Address Seq	Address Type	Address Line 1	City	State	Postal Code	Contact Permission/Opt In
Yes	3	HOME	10100 SUNSHINE LANE	CLEVELAND	OH	44135	promoinfo
No	4	HOME	8789 GULF STREET	LANARK VILLAGE	FL	32323	promoinfo

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.

The screenshot shows the 'Address Detail' window with the following fields and values:

Create User Id	ameske	Update User Id	am
Create Date	2012-02-28	Update Date	2012-02-28
User Label	<input type="text"/>	City	LAS VEGAS
Address Line 1	721 LEFTWICH ST	County	<input type="text"/>
Address Line 2	<input type="text"/>	State	NV
Address Line 3	<input type="text"/>	Country	<input type="text"/>
Address Line 4	<input type="text"/>	Postal Code	89116
Apartment	100	Address Type	BUSINESS
Contact Permission/Opt In	none	Primary	No
		Set Primary	<input type="checkbox"/>

Buttons: Save, Delete

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 opens in an [Address Detail Window](#).
2. Modify 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 [Address Detail 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 displays 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 Number

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

To access the Telephone Number 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 Number screen opens.



Primary	Phone Seq	Phone Type	Phone Number	Extension	Contact Permission/Opt In
Yes	1	HOME	5143664033	274	SHIPPING CONFIRMATIONS ONLY

Figure 2-28: Telephone Numbers Screen

Telephone Number Screen

The Telephone Number 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

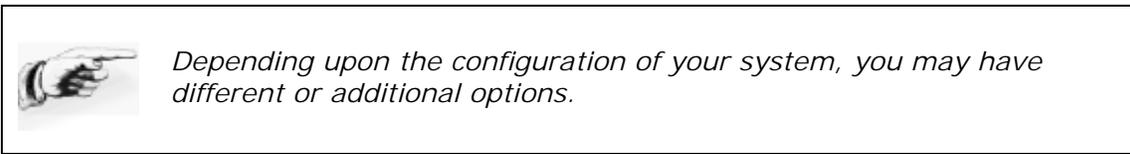
The Phone Detail [Window](#) is used to enter or update information for a Customer phone.

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.



- **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:

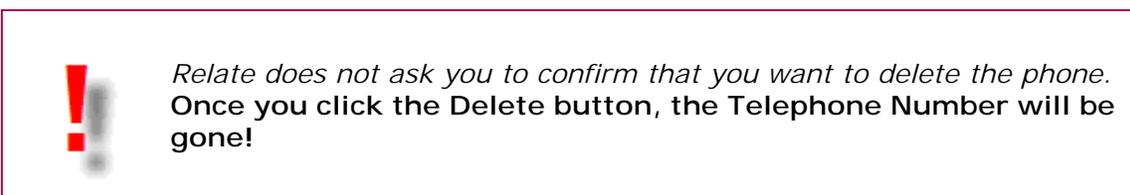
1. In the [Telephone Number](#) screen, click the Telephone Number to edit.
The Telephone Number opens in a [Phone Detail Window](#).
2. Modify the Telephone Number.
3. Click **Save** to save the changes and close the [Phone Detail Window](#).

To close the [Phone Detail 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 opens in a [Phone Detail Window](#).
2. Click **Delete** to delete the Telephone Number and close the [Phone Detail Window](#).



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.



The screenshot shows the 'Email Screen' for a customer named Bonnie Barker. The customer's address is 7866 RIVERS EDGE, HENDERSON, NV. The screen is divided into sections: 'Customer Detail' (with fields for Customer Id, Create Date, Update Date, and Source), 'Card Detail' (with LOY Test 1 No Pin fields), and 'Email Addresses'. The 'Email Addresses' section contains a table with columns for Primary, Email Seq, Email Type, Email, Contact Permission/Opt In, and Format Preference.

Primary	Email Seq	Email Type	Email	Contact Permission/Opt In	Format Preference
Yes	1	HOME	bbarker@email.com		HTML
No	2	BUSINESS	b.bark@work.com	ORDER ACKNOWLEDGEMENTS ONLY	TEXT

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. In the [Email](#) screen, click the Email to edit.
The Email opens 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 [Email Detail 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 opens 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.

The screenshot shows the 'Attributes Screen' for a customer named Robyn Campbell. The customer's address is 72 RATTLESNAKE DR, LAS VEGAS, NV. The 'Customer Detail' section includes fields for Customer Id (103), Create Date (2011-03-14), Create User Id (1), Update Date (2012-09-14), Update User Id (Household Job), Source, Phone (7415670824), and Email (rcampbell@email.com). The 'Card Detail' section shows Loy Test 2 No Pin 55552 and a unique ID 1944539757598995. Below this is a table titled 'Customer Attributes' with columns: Group, Name, Description, Value, Data Type, Unique, Editable, and OpenAccess. The table contains two rows: 'Counts for Customer' with 'Number of Pets' (Value: 3, Data Type: Number, Unique: No, Editable: Yes, OpenAccess: No) and 'SENIOR_CITIZEN' (Value: No, Data Type: Logical, Unique: Yes, Editable: Yes, OpenAccess: Yes).

Group	Name	Description	Value	Data Type	Unique	Editable	OpenAccess
Counts for Customer	Number of Pets	Number of Pets	3	Number	No	Yes	No
	SENIOR_CITIZEN	Customer a Senior Citizen?	No	Logical	Yes	Yes	Yes

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 be 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.

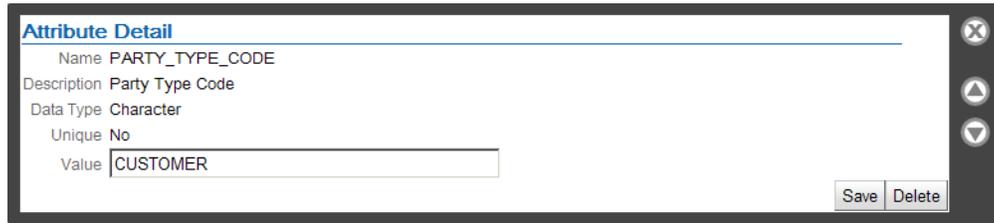


Figure 2-33: Attribute Detail Window

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 [Attributes](#) screen, click the Attribute to edit.
The Attribute opens 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.

General													
Transaction	59378004	Currency	USD	Start Time	2011-09-13T20:33:35.000-04:00								
Grand Total	360.54	Original Currency		End Time	2011-09-13T20:38:53.000-04:00								
Location	110	Exchange Rate		Tax Amt	23.58								
Business Date	2011-09-13	Net Amt	336.96	Cashier	100								
Void Flag	false	Linked Transaction		Show Tender and Tax	<input type="checkbox"/>								
Register	2	Status	DELIVERED										
Sales Line Items													
Void Flag	Seq.	Item Id	Actual Price	Qty	Ext. Amt	Regular Price	Unit Cost	Item Type	Scan Id	DEPT	SUB_DEPT	CLASS	STYLE_ID
No	1	9999222200020	169.99	1.00	169.99	169.99	169.99	Stock	9999222200020				
No	2	9999222200017	34.99	1.00	34.99	69.99	34.99	Stock	9999222200017				
No	3	9999222200018	61.99	1.00	61.99	61.99	61.99	Stock	9999222200018				
No	4	9999222200016	69.99	1.00	69.99	69.99	69.99	Stock	9999222200016				
Commission Line Item Modifiers													
Void Flag	Line Item Seq.	Commission Amt	Commission Percent	Commission Percent Of Item	Commissioned Employee Id								
No	1			1.00	100								
No	2			1.00	100								
No	3			1.00	100								
No	4			1.00	100								
Price Line Item Modifiers													
Void Flag	Line Item Seq.	Price Change Amt	Price Modifier Type	Price Change Reason	Promotion Id								
No	1	0.00	Subtract	XmasClearance	6.5:								

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:

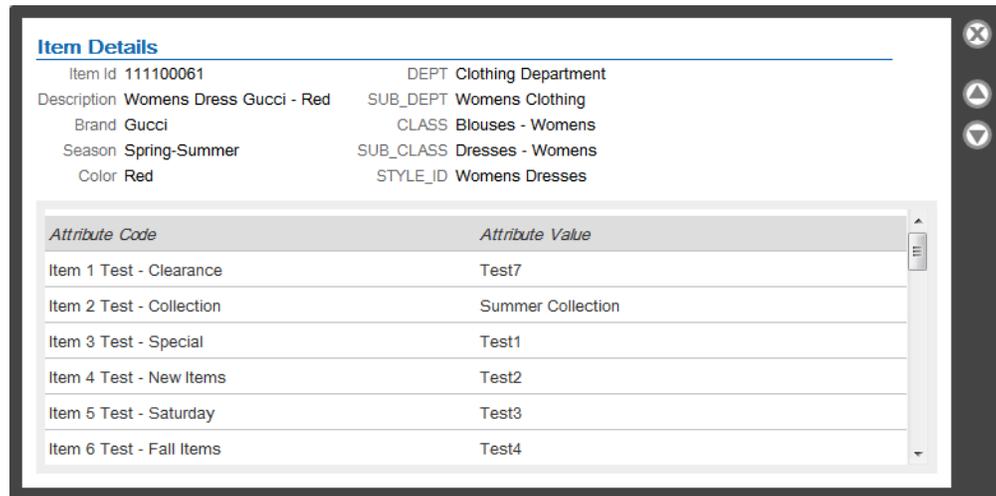


Figure 2-39: Item Details Window

- **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.

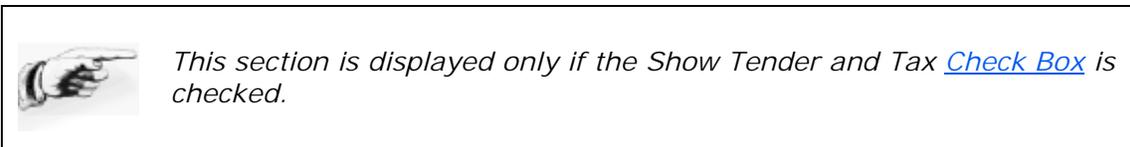
Price Line Item Modifiers

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:

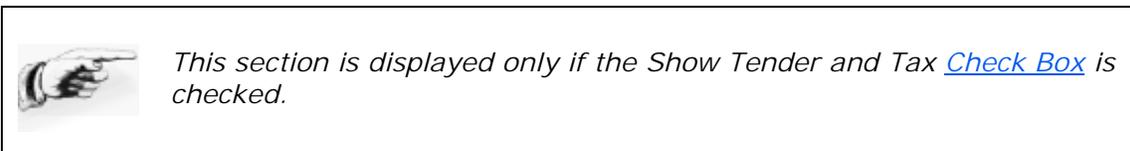


- **Void Flag** - Indicates whether the line item was voided.
 - Yes** - The line item was voided.
 - No** - The line item was not voided.
- **Seq.** - The order in which the line item was added to the transaction.
- **Tax Amt** - The amount of the tax.
- **Taxable Amt** - The amount to which the tax 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:



- **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.

The screenshot displays the Card Association interface for a customer. At the top left is a profile picture placeholder and the customer's name: **Ms Jason Z Caskey IV**, 2649 CEDAR AVENUE, CAMANO, FL. To the right, under **Customer Detail**, are fields for Customer Id (44020), Create Date (2014-03-10), Create User Id (SoapUIUser), Update Date (2014-08-19), Update User Id (SoapUIUser), Source (Walkin), Phone (8371812346), and Email (bob.e.brown@mailinator.com). Further right, under **Card Detail**, are four entries for WSDL-SoapUI-Cust with card numbers and primary holder icons. A **Customer Actions** dropdown menu is in the top right. Below the customer info is the **Add Card Association** section with input fields for Card Number, Serial Number, and Account Id, and a Search button. At the bottom is the **Card Association** table.

Serial Number	Card Number	Card Type	Number of Card Holders	Status
1000502001000134	8155612995840982	WSDL-SoapUI-Cust	1	Active
1000503001000170	4378536681196550	WSDL-SoapUI-Cust	1	Active
1000503001000220	9654650514053084	WSDL-SoapUI-Cust	1	Active
1000503001000270	1340173125968997	WSDL-SoapUI-Cust	1	Active

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](#).

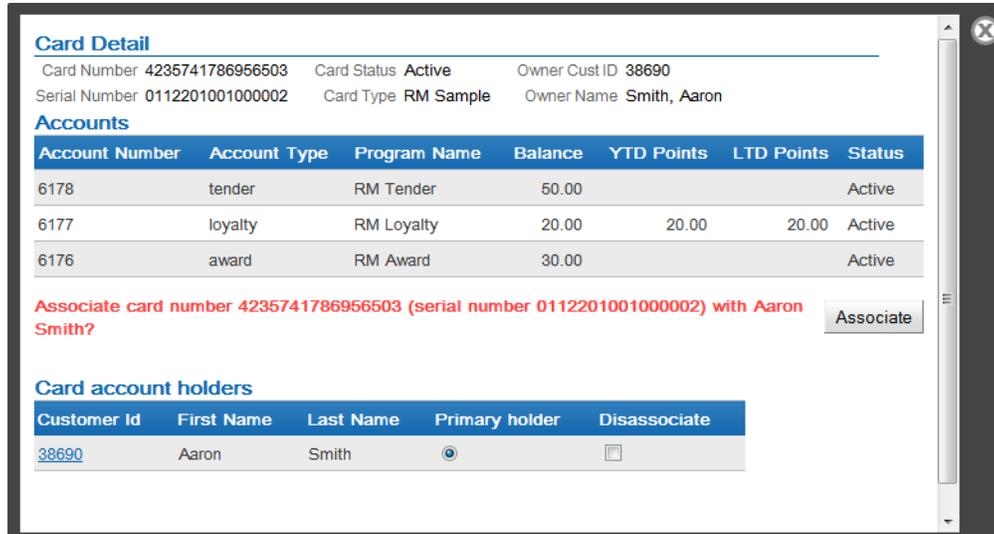


Figure 2-41: Card Detail Window

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](#)).

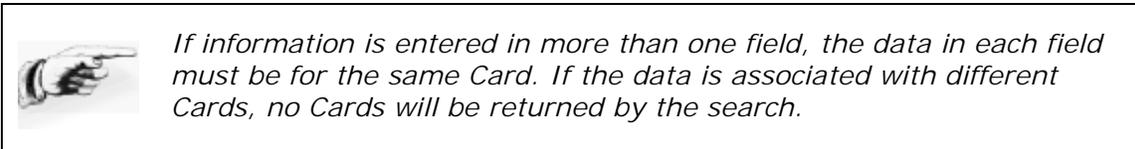
The Card Detail [Window](#) will also have the following button:

- **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.



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

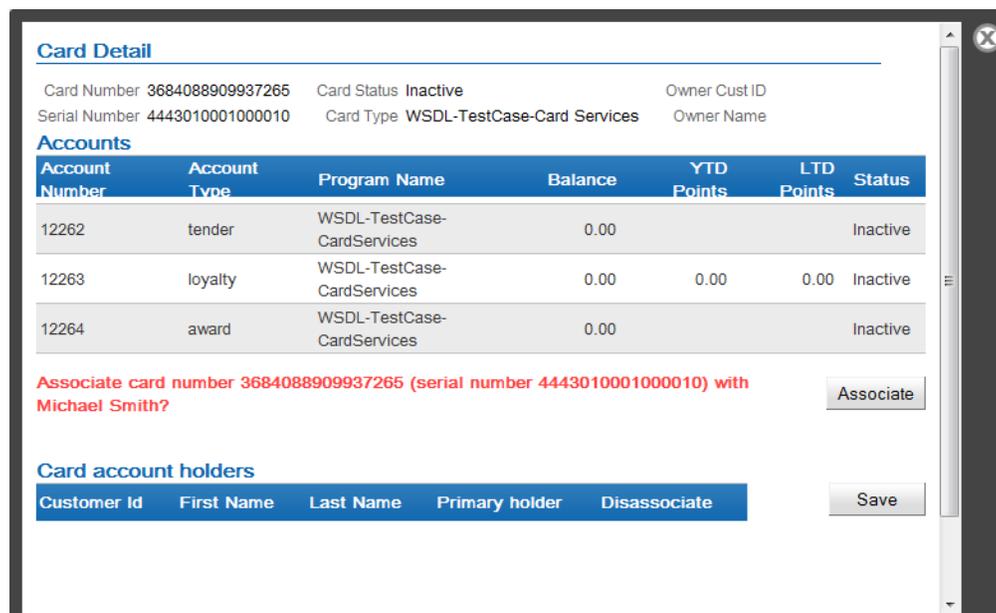


Figure 2-42: Card Detail Window

- ❑ 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 opens in a [Card Detail Window](#).

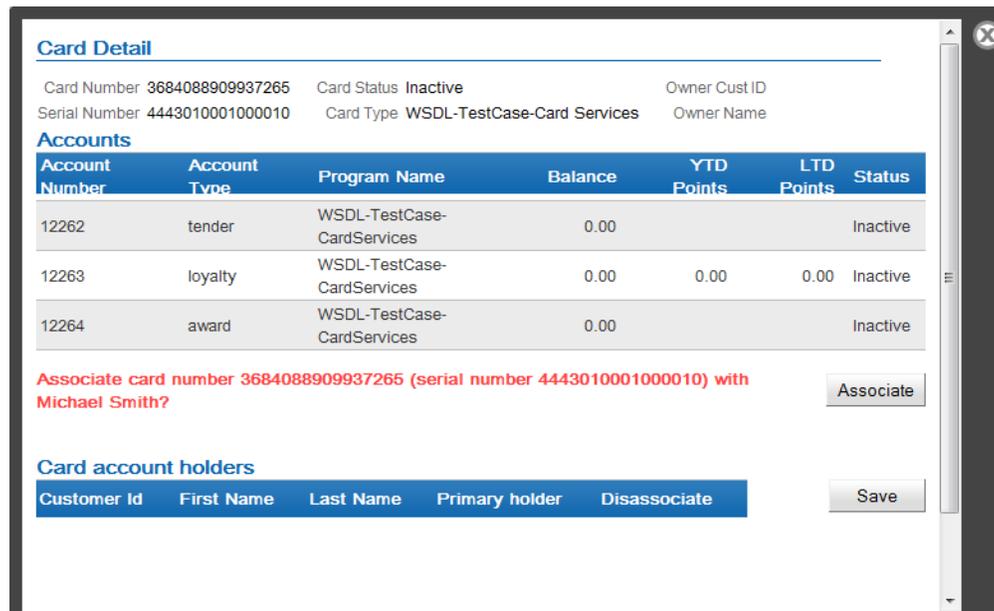
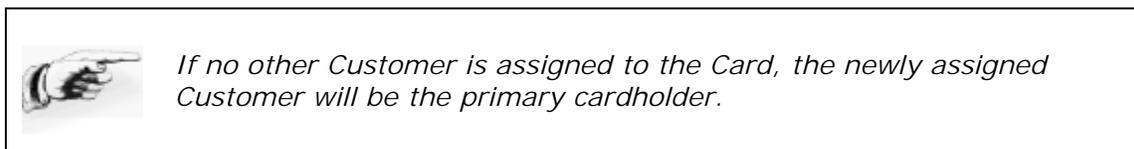


Figure 2-44: Card Detail Window

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.



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](#).

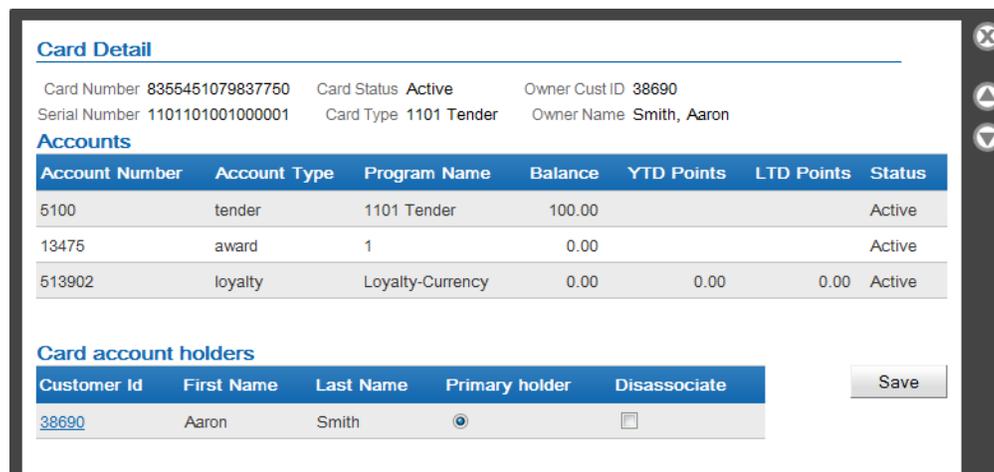


Figure 2-46: Card Detail Window

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.

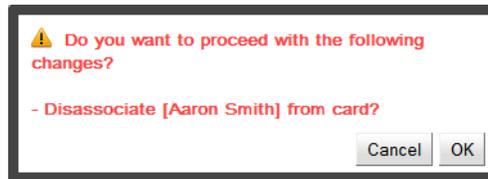


Figure 2-47: Disassociate Card Confirmation Prompt

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](#).

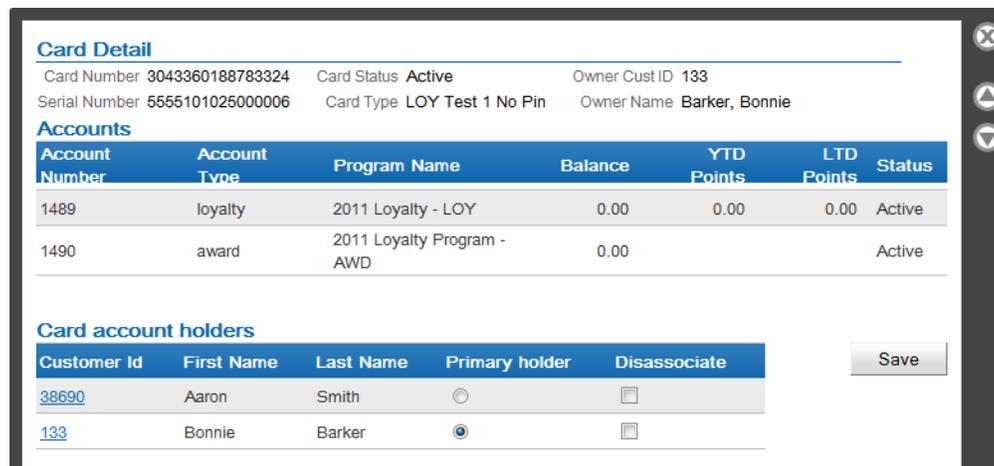


Figure 2-48: Card Detail Window

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.

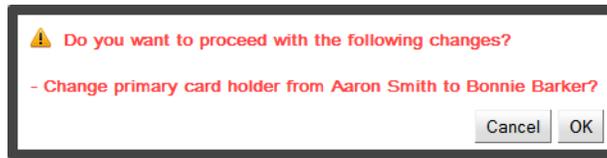


Figure 2-49: Change Primary Cardholder Confirmation Prompt

To return to the Card Detail [Window](#) without saving the change, click **Cancel**.

- 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.

The screenshot shows the "Alternate Key Screen" for a customer named Bonnie Barker. The top section includes a profile picture, name, address (7866 RIVERS EDGE, HENDERSON, NV), and a "Customer Detail" section with fields for Customer Id (133), Create Date (2011-03-14), Create User Id (1), Update Date (2011-08-25), Update User Id (STORE ASSN TASK), Source, Phone, and Email (bbarker@email.com). There are buttons for "Add Alt Key" and "Customer Actions". Below this is a "Card Detail" section with fields for LOY Test 1 No Pin (5502419695521705) and LOY Test 1 No Pin (3043360188783324). The main section is titled "Alternate Keys" and contains a table with two columns: "Alt Key Type" and "Alternate Key".

Alt Key Type	Alternate Key
WR_SHOPPER_ID	1002908
WR_CUST_ID	110253
XSTORE_CUST_ID	110253
XSTORE_ID	110253

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](#).

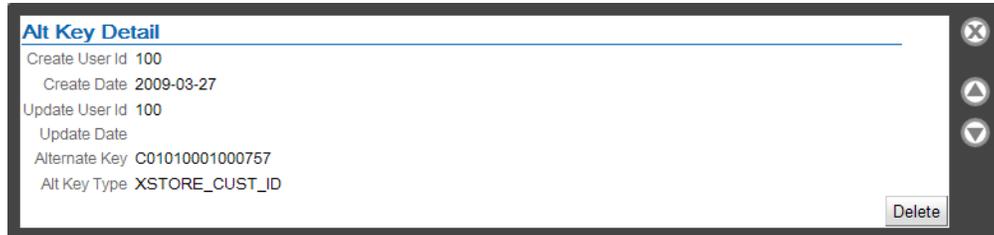


Figure 2-51: Alt Key Detail Window

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.

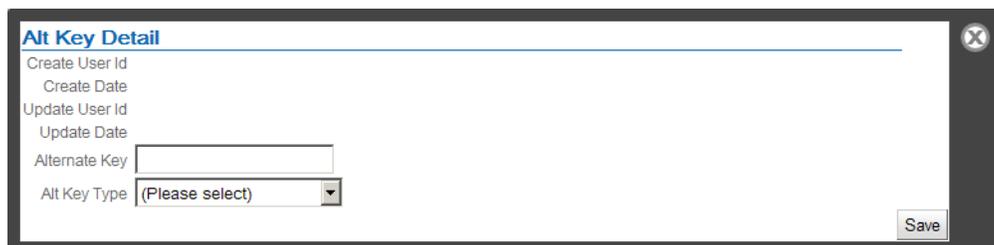


Figure 2-52: Alternate Key Detail Window

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](#).



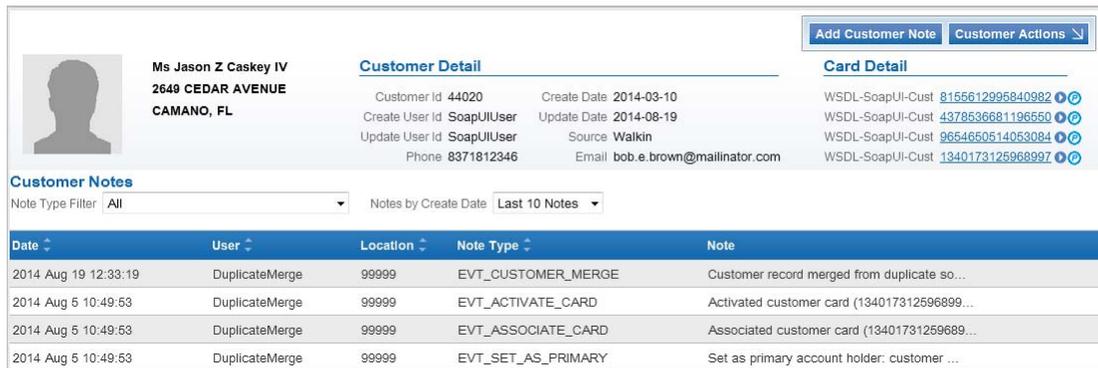
Relate does not ask you to confirm that you want to delete the Alternate Key. Once you click the Delete button, the Alternate Key will be gone!

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.



Customer Detail

Customer Id 44020 Create Date 2014-03-10
 Create User Id SoapUIUser Update Date 2014-08-19
 Update User Id SoapUIUser Source Walkin
 Phone 8371812346 Email bob.e.brown@mailinator.com

Card Detail

WSDL-SoapUI-Cust 8155612996840982
 WSDL-SoapUI-Cust 4378536681196550
 WSDL-SoapUI-Cust 9654650514053084
 WSDL-SoapUI-Cust 1340173125968997

Customer Notes

Note Type Filter: All Notes by Create Date: Last 10 Notes

Date	User	Location	Note Type	Note
2014 Aug 19 12:33:19	DuplicateMerge	99999	EVT_CUSTOMER_MERGE	Customer record merged from duplicate so...
2014 Aug 5 10:49:53	DuplicateMerge	99999	EVT_ACTIVATE_CARD	Activated customer card (134017312596899...
2014 Aug 5 10:49:53	DuplicateMerge	99999	EVT_ASSOCIATE_CARD	Associated customer card (13401731259689...
2014 Aug 5 10:49:53	DuplicateMerge	99999	EVT_SET_AS_PRIMARY	Set as primary account holder: customer ...

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.

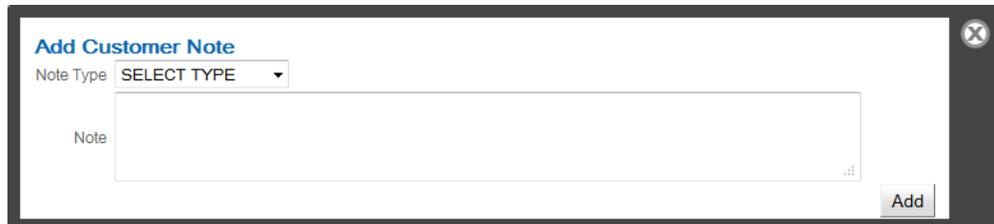


Figure 2-54: Add Customer Note Window

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.

The screenshot shows the 'Promotion History Search' interface for a customer. At the top left is a profile picture of a dog. To its right, the customer's name and address are listed: 'Ms Joel L Dollar V, 356 FIFTH AVENUE, NUTLEY, UT'. Below this is a 'Promotion History Search' section with two date pickers: 'Promotion Start Date' set to '2014-01-01' and 'Promotion End Date' set to '2014-09-05'. There are 'Clear' and 'Search' buttons. To the right of the search form are two tabs: 'Customer Detail' and 'Card Detail'. The 'Customer Detail' tab is active, showing fields for Customer Id (37538), Create Date (2011-12-05), Create User Id (SoapUIUser), Update Date (2010-05-10), Update User Id (SoapUIUser), Source (Walkin), Phone (3356385994), and Email (evelyn.c.reardon@pookmail.com). The 'Card Detail' tab shows three card numbers: 4031688247, 1178438312, and 9340695412.

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](#).

Promotion History Result

Number of Events: 17 Number of Responses: 4 Response Rate: 0.23 Total Promotion Revenue: 6,120.03

Campaign ID/Name	Promotion ID/Name	Start Date	End Date	Control Group?	Response Amount
458/cmp930 Promo 2	561/cmp930 Promo 2	2014-08-01	2015-07-11	No	0.00
457/Promo CRM-930	560/Promo CRM-930	2014-07-31	2015-07-11	No	0.00

Figure 2-56: Promotion History Search Results

Promotion History Screen

The Promotion History Screen includes the following fields:

The screenshot displays the Promotion History Screen for a customer. At the top, there is a 'Customer Actions' dropdown menu. Below it, the customer's profile is shown, including a placeholder for a photo and the name 'DR David G Back PhD' with address '4498 VICTORIA STREET DEERFIELD, IL'. Two tabs are visible: 'Customer Detail' and 'Card Detail'. The 'Customer Detail' tab shows fields for Customer Id (30280), Create Date (2011-12-13), Create User Id (SoapUIUpdateUser), Update Date (2013-11-12), Update User Id (SoapUIUpdateUser), Source (Internet), Phone, and Email (davidgback@spambob.com). The 'Card Detail' tab shows several WSDL-SoapUI-TestCase-PosLog entries with IDs like 47089049607405, 6942672453402, 7628823575095, and 0187902253804.

Below the tabs is the 'Promotion History Search' section, which includes input fields for 'Promotion Start Date' (set to 2013-01-01) and 'Promotion End Date' (set to 2014-09-05), along with 'Clear' and 'Search' buttons.

The 'Promotion History Result' section shows summary statistics: 'Number of Events: 14', 'Number of Responses: 1', 'Response Rate: 0.07', and 'Total Promotion Revenue: 13.19'. Below this is a table with the following columns: Campaign ID/Name, Promotion ID/Name, Start Date, End Date, Control Group?, and Response Amount.

Campaign ID/Name	Promotion ID/Name	Start Date	End Date	Control Group?	Response Amount
413/OH Customers Promo	490/OH Customers Promo	2014-04-09	2014-08-09	No	0.00
273/test	301/test	2013-04-27	2013-04-30	No	0.00
276/test	304/test	2013-04-12	2013-04-27	No	0.00
274/test	302/test	2013-04-12	2013-04-27	No	0.00
267/TestDynamic	295/TestDynamic	2013-03-28	2013-03-30	No	0.00
265/NewETTest	293/NewETTest	2013-03-28	2013-03-30	No	0.00
266/TestDynamic	294/TestDynamic	2013-03-27	2013-03-30	No	0.00
201/ScorecardTest	209/ScorecardTest	2013-01-17	2013-03-27	No	13.19
97/LS-DynamicTest2	97/LS-DynamicTest2	2012-08-27	2013-07-27	No	0.00
112/DynamicPromo	116/DynamicPromo	2012-08-09	2013-08-09	No	0.00
javascript: nicPromo	115/DynamicPromo	2012-08-09	2013-08-09	No	0.00

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.





Michael L. Smith
1312 BLAIR COURT
WARRENSBURG, MO

Customer Detail

Customer Id	18816	Create Date	2013-06-27
Create User Id	SoapUIUser	Update Date	2010-05-01
Update User Id	SoapUIUser	Source	Walkin
Phone	6606134890	Email	michael.l.smith@dodgit.com

Card Detail

WSDL-TestCase-Card Services [2843197292496838](#)

Duplicates

Make Source	ID	Name	Address	City	State	Postal Code	Phone	Email
●	18816	Michael Smith	1312 BLAIR COURT	WARRENSBURG	MO	64093	6606134890	michael.l.smith@dodgit.com

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.

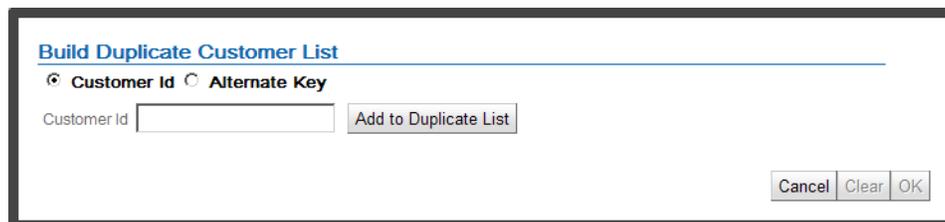


Figure 2-59: Build Duplicate Customer List

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.

Build Duplicate Customer List

Customer Id Alternate Key

Alt Key Type: (Please select) Alternate Key:

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.

Build Duplicate Customer List

Customer Id Alternate Key

Customer Id:

Duplicate Customer list

ID	NAME	ADDRESS	CITY	STATE
355609	Harold Smith	3861 QUEEN LN	LYNCHBURG	VA

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.



A Delete [Link](#) opens. 

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
<input checked="" type="radio"/>	310751	Harry Smith	3861 QUEENS LANE	LYNCHBURG	VA	24504	4348459905	harrysmith@trashymail.com
<input type="radio"/>	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.

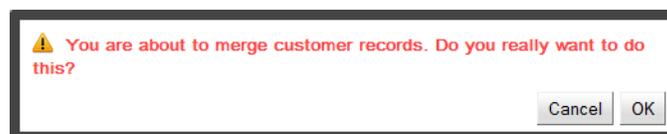


Figure 2-63: Merge Customers Confirmation Prompt

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](#).

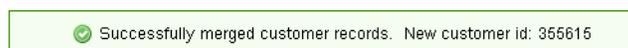


Figure 2-64: Successful Customer Merge Message

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.

Table 2-2: Security Group Rules

If...	Then...
No Security Group has been applied to a Customer.	All Users will have full access to read and update the Customer's information.
<ul style="list-style-type: none"> ■ A Security Group has been applied to a Customer. -and- ■ The current User is a member of that Security Group. 	The User can access the Customer information that is permitted by the Security Group's privilege level.
<ul style="list-style-type: none"> ■ Two or more Security Groups have been applied to a Customer. -and- ■ The current User belongs to two or more of those Security Groups. 	The User will have the most permissible privilege level given by those Security Groups.
<ul style="list-style-type: none"> ■ One or more Security Groups are applied to a Customer. -and- ■ The current User is not a member of that Security Group. 	The User 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). <i>This is the Limited Read privilege level.</i>

Table 2-2: Security Group Rules (continued)

If...	Then...
<p>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.</p>	

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:

The screenshot displays the 'Associate Assignments' screen for a customer named Alex A Smith. The customer's address is 3531 CHICAGO AVENUE, FRESNO, CA. The 'Customer Detail' section includes fields for Customer Id (8015), Create Date (2011-08-23), Create User Id (Jmeter), Update Date (2012-09-14), Update User Id (Household job), Source (JMETER), Phone (5595035262), and Email (alexasmith@spambob.com). A 'Customer Actions' menu is visible in the top right. Below the details is a table titled 'Associate Assignments' with columns for Primary, Role, Location, Associate, Locked, Updated By, and Updated Date/Time. The table contains three rows of data.

Primary	Role	Location	Associate	Locked	Updated By	Updated Date/Time
Yes	Fine Jewelry					
No	Accessories					
No	Menswear					

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 Detail 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 Assignments 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.

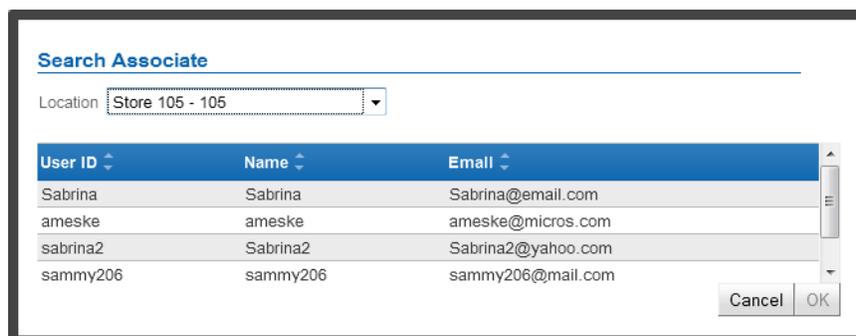


Figure 2-70: Search Associate Window

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 Assignments 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 Assignments 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.

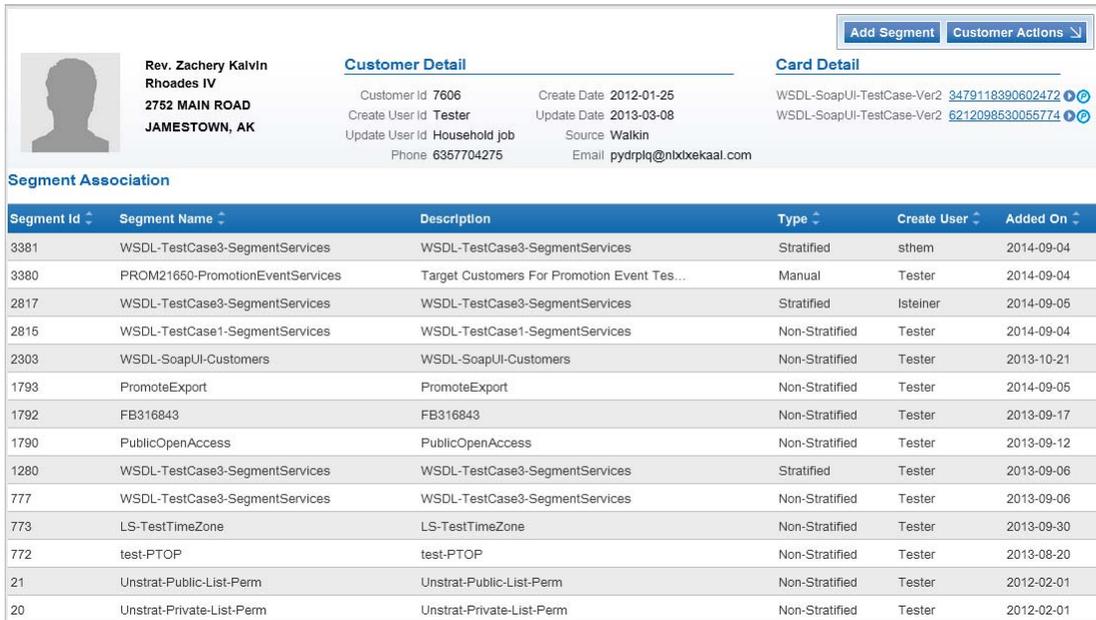
Segment Association

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.



Customer Detail

Customer Id 7606 Create Date 2012-01-25
 Create User Id Tester Update Date 2013-03-08
 Update User Id Household job Source Walkin
 Phone 6357704275 Email pydrplq@nxbxekaal.com

Card Detail

WSDL-SoapUI-TestCase-Ver2 3479118390602472
 WSDL-SoapUI-TestCase-Ver2 6212098630055774

Segment Association

Segment Id	Segment Name	Description	Type	Create User	Added On
3381	WSDL-TestCase3-SegmentServices	WSDL-TestCase3-SegmentServices	Stratified	sthem	2014-09-04
3380	PROM21650-PromotionEventServices	Target Customers For Promotion Event Tes...	Manual	Tester	2014-09-04
2817	WSDL-TestCase3-SegmentServices	WSDL-TestCase3-SegmentServices	Stratified	Isteiner	2014-09-05
2815	WSDL-TestCase1-SegmentServices	WSDL-TestCase1-SegmentServices	Non-Stratified	Tester	2014-09-04
2303	WSDL-SoapUI-Customers	WSDL-SoapUI-Customers	Non-Stratified	Tester	2013-10-21
1793	PromoteExport	PromoteExport	Non-Stratified	Tester	2014-09-05
1792	FB316843	FB316843	Non-Stratified	Tester	2013-09-17
1790	PublicOpenAccess	PublicOpenAccess	Non-Stratified	Tester	2013-09-12
1280	WSDL-TestCase3-SegmentServices	WSDL-TestCase3-SegmentServices	Stratified	Tester	2013-09-06
777	WSDL-TestCase3-SegmentServices	WSDL-TestCase3-SegmentServices	Non-Stratified	Tester	2013-09-06
773	LS-TestTimeZone	LS-TestTimeZone	Non-Stratified	Tester	2013-09-30
772	test-PTOP	test-PTOP	Non-Stratified	Tester	2013-08-20
21	Unstrat-Public-List-Perm	Unstrat-Public-List-Perm	Non-Stratified	Tester	2012-02-01
20	Unstrat-Private-List-Perm	Unstrat-Private-List-Perm	Non-Stratified	Tester	2012-02-01

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:

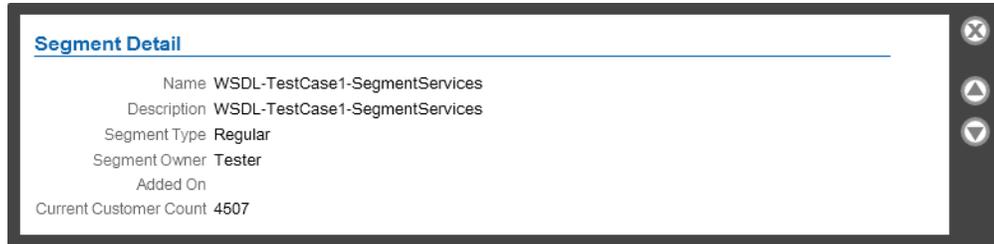


Figure 2-72: Segment Detail Window - Unstratified Segment

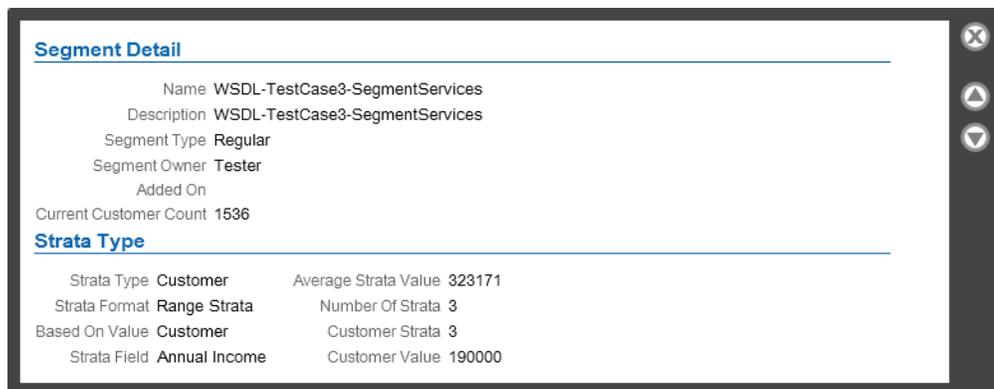


Figure 2-73: Segment Detail Window - Stratified Segment

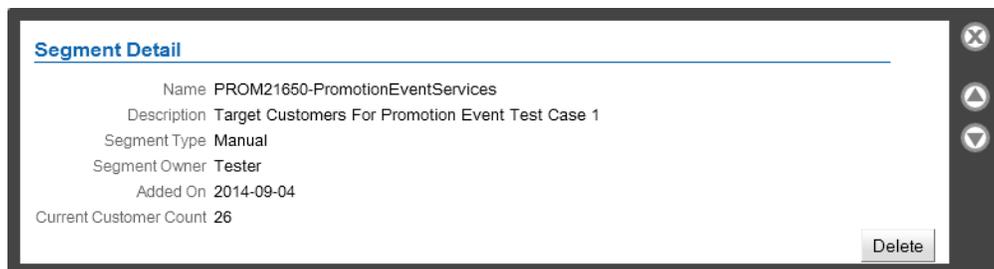


Figure 2-74: Segment Detail Window - Manual Segment

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.

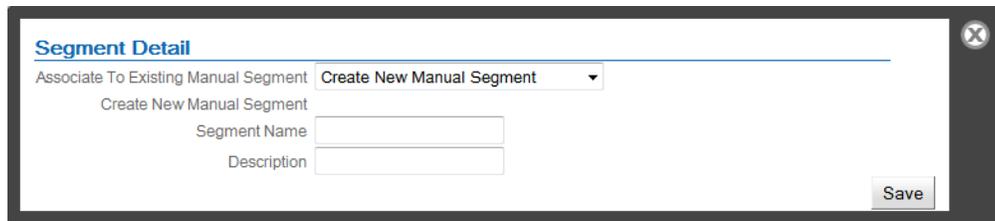


Figure 2-75: Create Segment Detail Window

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 [Segment Detail 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.

Task Id	Task Name	Start Date	End Date	Task Type	Creator	Status	Assigned To	Customer
10211	Promotion Id:293:NewETTest	2013-03-27	2013-03-30	EVENT	Relate	OPEN		
2139	Promotion Id:39:March 20 Coupon	2012-03-20	2012-03-30	EVENT	Relate	OPEN	WSDL-User100	

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 585](#).

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 591](#) 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.

Customer Detail

Card Detail

Items added within: Last 10 Transactions | Purchased and Wish list items | [Switch to tile view](#)

Date	DEPT	SUB_DEPT	CLASS	SUB_CLASS	STYLE_ID	Item Id	Description	Publish?	Wish List?	Delete	View Image
2013 Jul 18 16:31:41	D87		C121	S78	718771	410000030769	Metal Tissue St...	Yes	★	Remove	
2011 Mar 15 14:04:08	D87		C121	S77	718640	410000030738	Retro Radar Sho...	Yes		...	
2011 Mar 15 14:02:58	D87		C122	S79	721115	410000030806	Houndstooth Thr...	Yes		...	

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](#):

Customer Detail

Card Detail

Items added within: Last 10 Transactions | Purchased and Wish list items | [Switch to tile view](#)

Date	DEPT	SUB_DEPT	CLASS	SUB_CLASS	STYLE_ID	Item Id	Description	Publish?	Wish List?	Delete	View Image
2013 Jul 18 16:31:41	D87		C121	S78	718771	410000030769	Metal Tissue St...	Yes	★	Remove	
2011 Mar 15 14:04:08	D87		C121	S77	718640	410000030738	Retro Radar Sho...	Yes		...	
2011 Mar 15 14:02:58	D87		C122	S79	721115	410000030806	Houndstooth Thr...	Yes		...	

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.

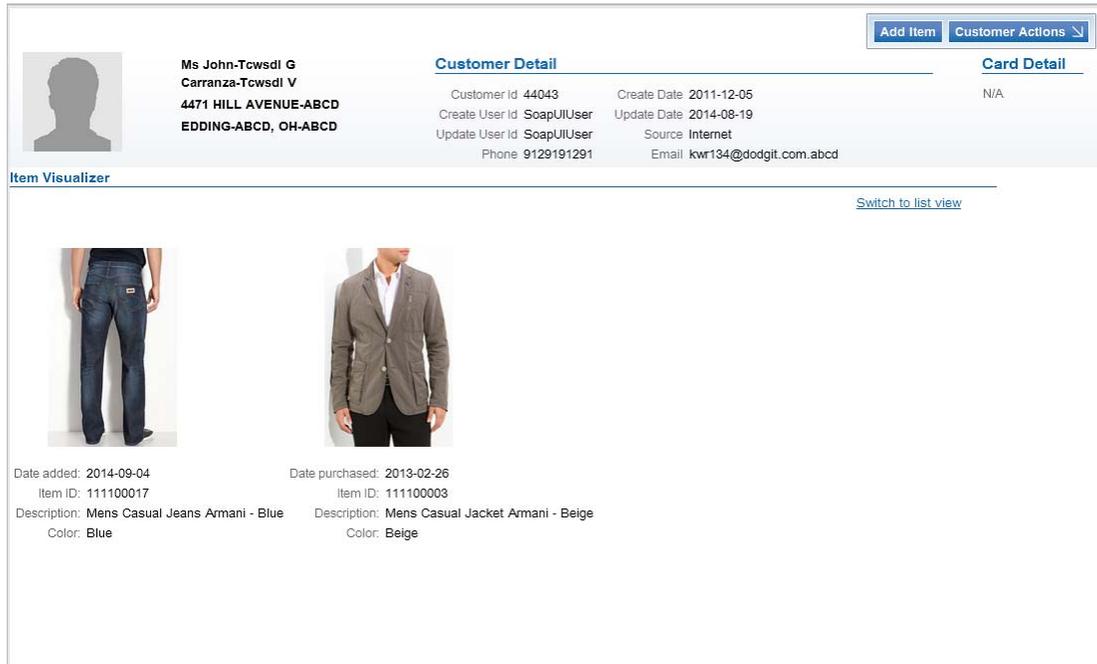
- **Last 30 Days** - Items added in the last 30 days.
- **Last 60 Days** - Items added in the last 60 days.
- **Last 120 Days** - Items added in the last 120 days.
- **Last Year** - Items added in the last year.
- **All** - All Items added.
- How the Item was added to the [List](#).
This [Selection Menu](#) 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:



The screenshot displays a customer record in Tile View. At the top right, there are buttons for "Add Item" and "Customer Actions". The customer information is as follows:

Customer Detail		Card Detail		
Customer Id	44043	Create Date	2011-12-05	N/A
Create User Id	SoapUIUser	Update Date	2014-08-19	
Update User Id	SoapUIUser	Source	Internet	
Phone	9129191291	Email	kw134@dodgit.com.abcd	

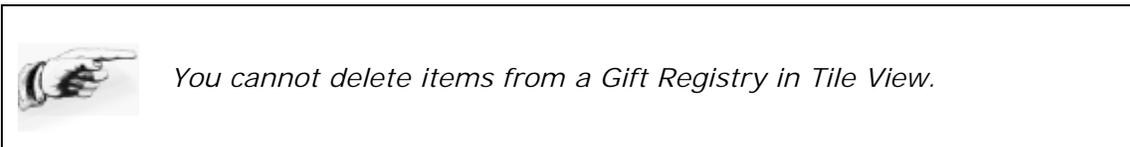
Below the customer details is the "Item Visualizer" section, which contains two items:

Item 1	Item 2
	
Date added: 2014-09-04 Item ID: 111100017 Description: Mens Casual Jeans Armani - Blue Color: Blue	Date purchased: 2013-02-26 Item ID: 111100003 Description: Mens Casual Jacket Armani - Beige Color: Beige

A "Switch to list view" link is located in the top right of the Item Visualizer section.

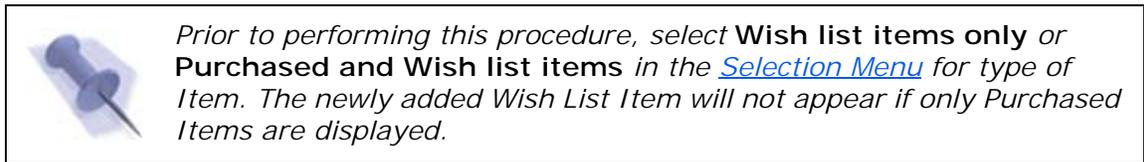
Figure 2-79: Tile View

- 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:



1. Click the **Add Item** button in the [Item Visualizer/Wish List Screen](#).

A [Window](#) opens for adding a Wish List Item.

The dialog box contains a 'Filter Type' dropdown menu set to 'Item Id', a 'Filter Criteria' text input field, and a 'Search' button. At the bottom right, there are 'Cancel' and 'OK' buttons.

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.

The search results window shows the same 'Filter Type' dropdown set to 'Item Id' and the 'Filter Criteria' text field containing '14'. The 'Search' button is highlighted. Below the search fields is a table with two columns: 'Item Id' and 'Description'. The table contains the following data:

Item Id	Description
410000030141	Laptop Sling Bag
410000030714	Sonic Wave Silicone Case
410000031148	400 thread count sateen sheet set
410000031407	Lena Bootie
410000031414	Lena Bootie
410000031421	Lena Bootie

At the bottom right, there are 'Cancel' and 'OK' buttons.

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.

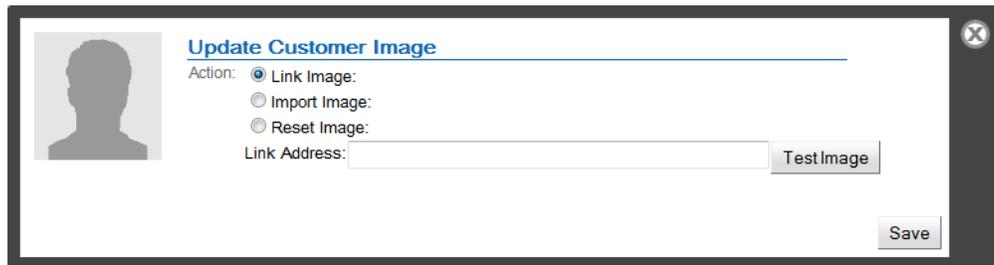


Figure 2-82: Update Customer Image Window

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](#).

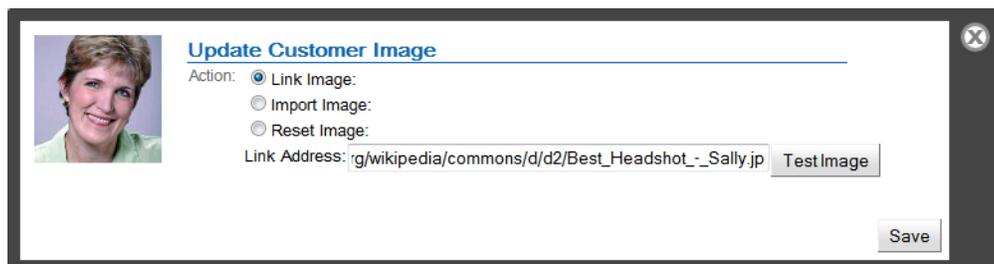


Figure 2-83: Test Image Displayed

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

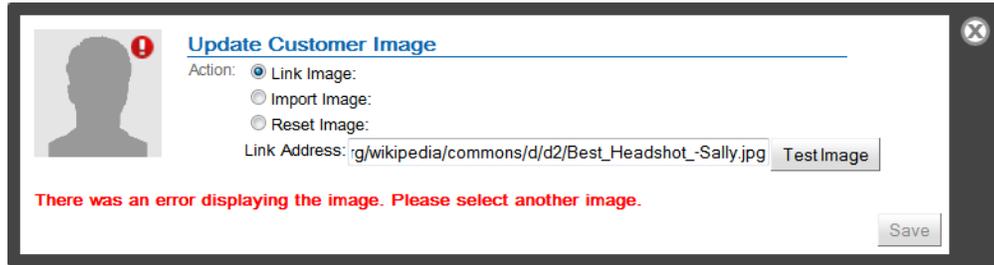


Figure 2-84: Error Displaying Image

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](#).

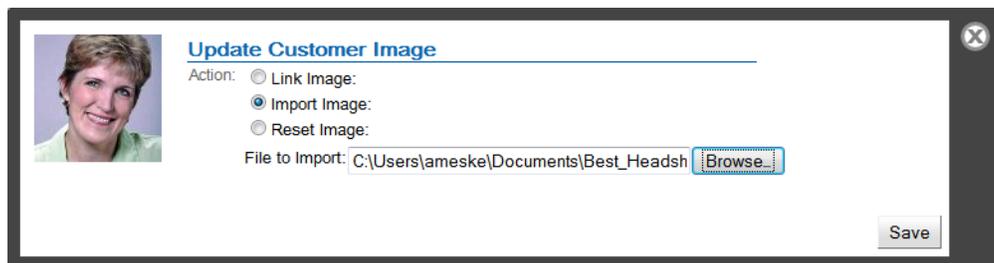


Figure 2-85: Import Image Displayed

If the image cannot be found or displayed, the [Window](#) displays an error.

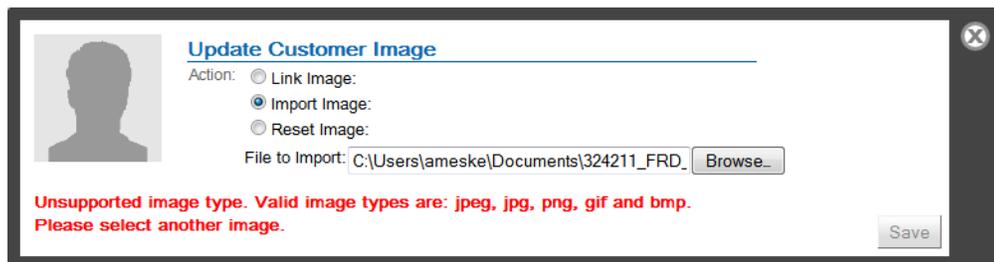


Figure 2-86: Image Type Unsupported

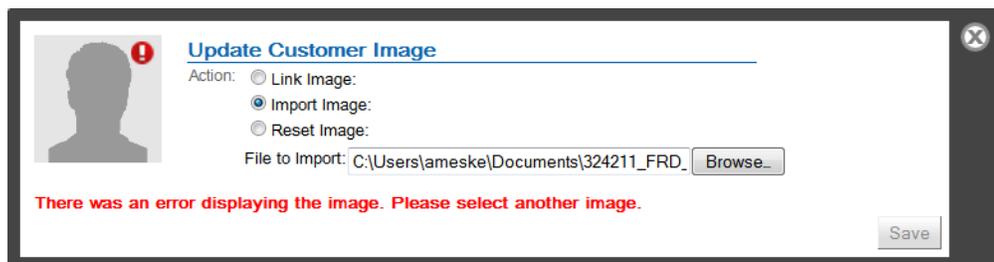


Figure 2-87: Image Display Error

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.



Registry Id	Registry Name	Event Type	Event Date	Venue Name	Primary Owner
5891	Test Case 1.0 - Housekeeping Test	WEDDING_SHOWER	2014-09-22	Wedding Song Banquet Hall-2	<input checked="" type="checkbox"/>

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:

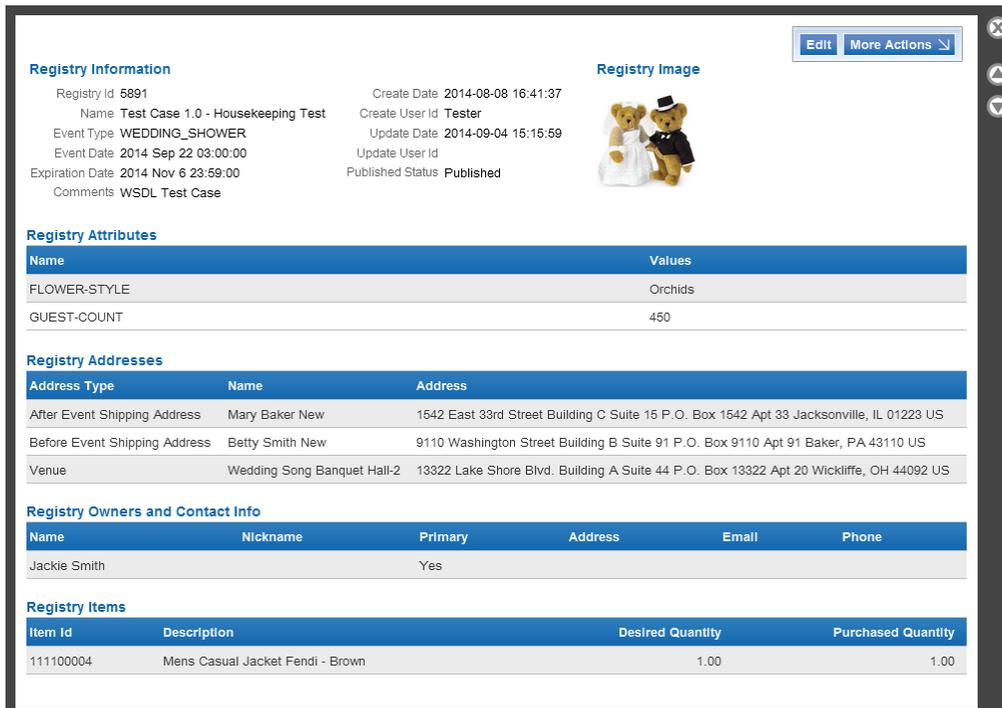


Figure 2-89: Registry Information Window

- **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:

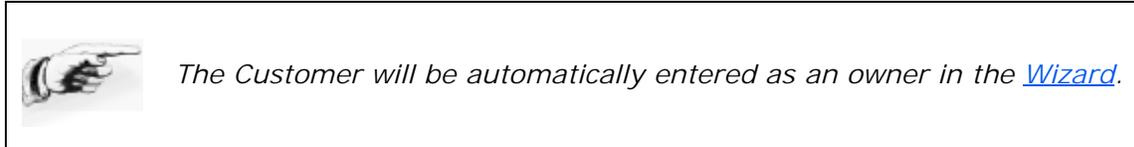
- **Print Registry** - Open the Registry in the [Gift Registry Print](#) page.
- **Visualize** - Go to the [Gift Registry Visualizer](#) for the Customer.



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.



- ❑ 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.

Customer Detail		Card Detail		
Customer Id	37476	Create Date	2012-12-27	N/A
Create User Id	Molly	Update Date	2014-06-28	
Update User Id	Emily	Source	Walkin	
Phone	4698023262	Email	haskell.d.guenther@dodgit.com	

Item Visualizer
Registry (Please select) [Switch to tile view](#)

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 displays for each Item:

Customer Detail

Rev. Haskell D Guenther 4th
748 OAK CIRCLE
WINDSOR, OH

Customer Id 37476 Create Date 2012-12-27
Create User Id Molly Update Date 2014-06-28
Update User Id Emily Source Walkin
Phone 4698023262 Email haskell.d.guenther@dodgit.com

Item Visualizer

Registry 532 | WSDL-TestCase6.0

Date	Item Id	Desired Quantity	Purchased Quantity	Description	View	Delete
2012-12-31	888800001	1.00	0.00	KitchenAid Toaster	<input type="checkbox"/>	Remove Item
2012-12-31	888800009	3.00	0.00	Westin Meat Grinder	<input type="checkbox"/>	Remove Item

Figure 2-91: Gift Registry Visualizer - Registry Selected

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 displays the following information in List View:

Customer Detail

Dr Braeden K Caban II
239 MAPLE AVENUE
RUTLAND, NC

Customer Id 50156 Create Date 2014-11-14
Create User Id sthem Update Date 2010-05-17
Update User Id sthem Source Walkin
Phone 9247339244 Email braeden.k.caban@dodgit.com

Item Visualizer

Registry 10258 | WSDL-TestSearch 9.3

Date	Item Id	Desired Quantity	Purchased Quantity	Description	View	Delete
2014-11-14	888800001	1.00	0.00	KitchenAid Toaster	<input type="checkbox"/>	Remove Item
2014-12-04	888800002	1.00	0.00	Hamilton Beach Blender	<input type="checkbox"/>	Remove Item

Figure 2-92: Gift Register Visualizer Screen - List View

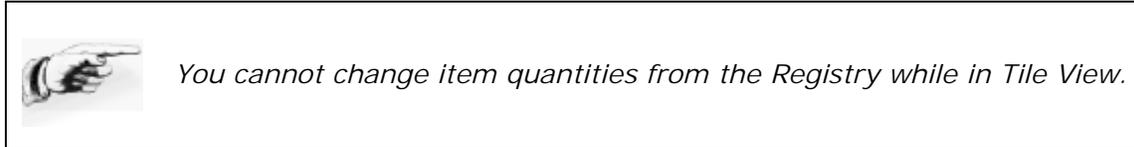
- **Date** - Date and time the Item was added to the Registry.
- **Item Id** - ID of the Item.
- **Desired Quantity** - A **Text Field** containing the requested quantity of the Item, along with an **Update Item Link** used to **Change the Desired Quantity of an Item**.
- **Purchased Quantity** - Number 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.

Change the Desired Quantity of an Item

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

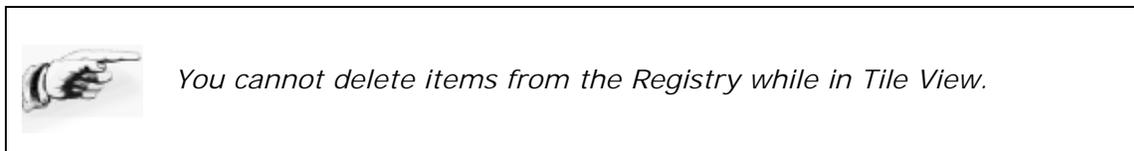
1. Enter the new quantity in the **Desired Quantity** [Text Field](#).
2. Click the **Update Item** [Link](#).

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*.



Tile View

The Gift Registry Visualizer Screen displays the following information in Tile View:

The screenshot shows the Gift Registry Visualizer interface. At the top right, there are buttons for 'Add Item' and 'Customer Actions'. The main content is divided into two sections: 'Customer Detail' and 'Card Detail'. The 'Customer Detail' section includes a profile picture placeholder and the following information: Ms Ralph A Tarantino, 301 VILLA DRIVE, PLYMOUTH, IN. The 'Card Detail' section includes: Customer Id 60151, Create Date 2014-11-14, Update Date 2012-05-19, Source Walkin, Email ralph.a.tarantino@dodgit.com, and Phone 6745493198. Below this is the 'Item Visualizer' section, which has a dropdown menu for 'Registry' set to '10241 | WSDL-TestCase 5.0'. It displays two items: a beige Armani jacket (Item ID: 111100003) and blue Armani jeans (Item ID: 111100017). A 'Switch to list view' link is located at the bottom right of the item visualizer.

Figure 2-93: Gift Registry Visualizer - Tile View

- The [Customer Basics](#) area.
- Selected Items in the Gift Registry Visualizer screen, with the following information for each Item:
 - ❑ Image for the Item.
 - ❑ **Item ID** - ID of the Item.

- ❑ **Description** - Description of the Item.
- ❑ **Color** - Color of the item.

Add an Item

To add an Item to a Registry:

1. Click the **Add Item** button in the [Gift Registry Visualizer](#).

An Item Search [Window](#) opens.

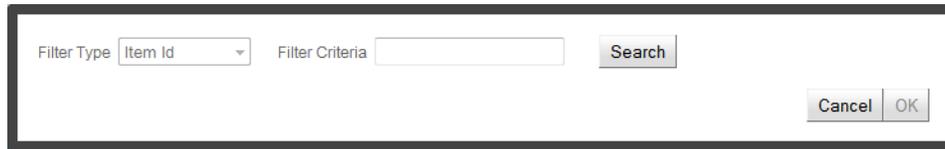
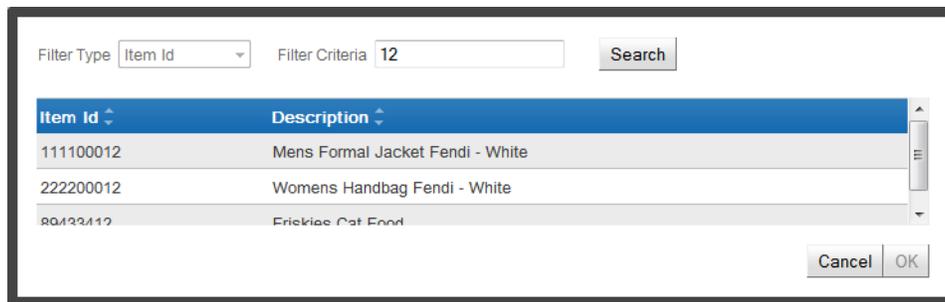


Figure 2-94: Item Search Window

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.



Item Id	Description
111100012	Mens Formal Jacket Fendi - White
222200012	Womens Handbag Fendi - White
80433412	Friskies Cat Food

Figure 2-95: Item Search Results

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

An Item Quantity [Window](#) opens.

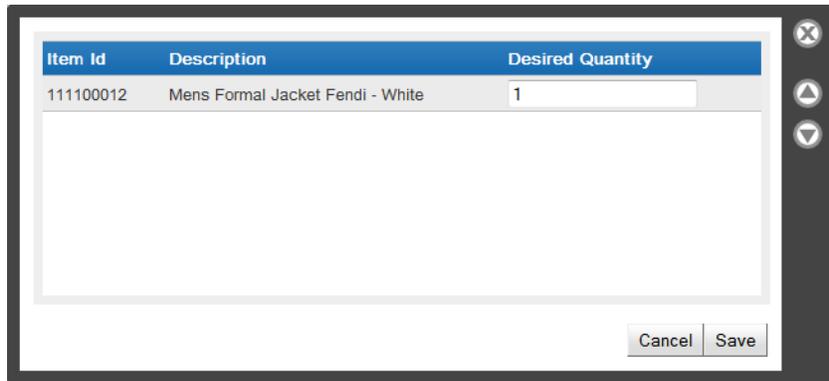


Figure 2-96: Item Quantity Window

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.

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.

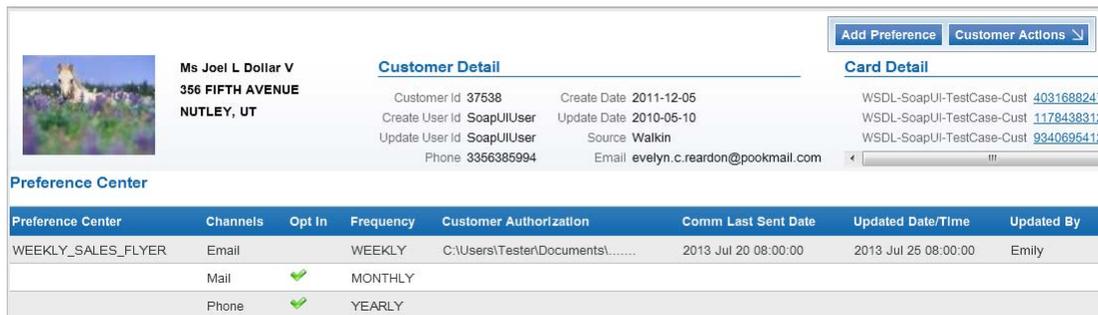


Figure 2-97: Preference Centers Screen

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 screenshot shows a window titled "Preference Center Detail". It displays the following information:

Preference Type ID: 3
 Preference Type: WEEKLY_SALES_FLYER

Channels	Opt In	Frequency	Customer Authorization	Comm Last Sent Date	Updated Date/Time	Updated By
Email	<input type="checkbox"/>	WEEKLY	C:\Users \Tester\Docu Remove	2013-07-20	2013 Jul 25 08:00:00	Emily
Mail	<input checked="" type="checkbox"/>	MONTHLY	Attach a document			
Phone	<input checked="" type="checkbox"/>	YEARLY	Attach a document			

Buttons: Save, Delete

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.

Channels	Opt In	Frequency	Customer Authorization	Comm Last Sent Date	Updated Date/Time	Updated By
Email	<input type="checkbox"/>	(Please select)	Attach a document			
Mail	<input type="checkbox"/>	(Please select)	Attach a document			
Phone	<input type="checkbox"/>	(Please select)	Attach a document			

Figure 2-98: 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** to 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:

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:

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](#) to 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:

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.



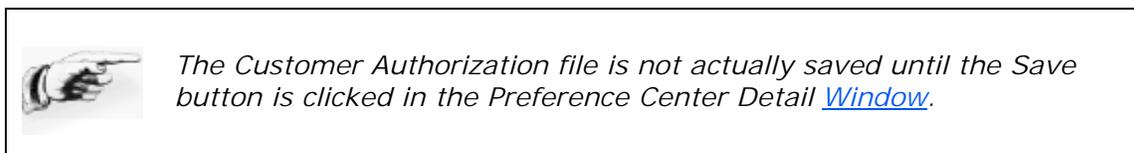
Figure 2-99: Choose a Document File to Import Window

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

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

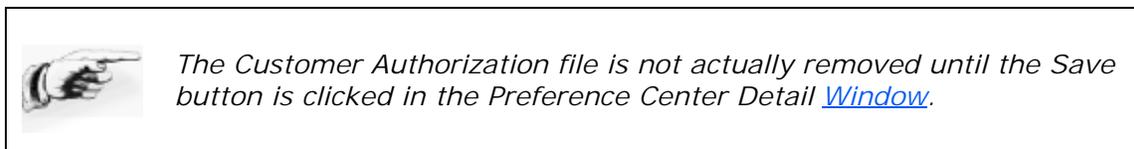
3. Once the file is selected, click the **Import** button to import the document

The [Window](#) closes and the filename is displayed in the Customer Authorization [Link](#).



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.



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.

The screenshot shows the Social Profile screen for Ms Susan S Relate. The top section includes a customer profile card with a placeholder image, name, address (444 NORTH HIGH STREET, FACEBOOK, OH), and contact information (Phone: 4404443333, Email: susanrelate@gmail.com). The card also displays 'Customer Detail' (Customer Id: 30597, Create Date: 2013-12-03, Update Date: 2013-01-01, Source: Facebook) and 'Card Detail' (N/A). Below the card is a 'Social Profile' section with a table of social media profiles.

Social Media Type	Name	ID	Profile	Exp. Date
	Susan Relate	100007230574574		2014-01-02
	susanrelate	2228368555		

Figure 2-100: 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](#).

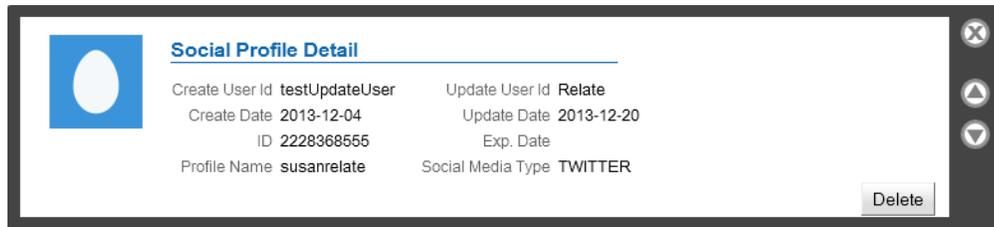


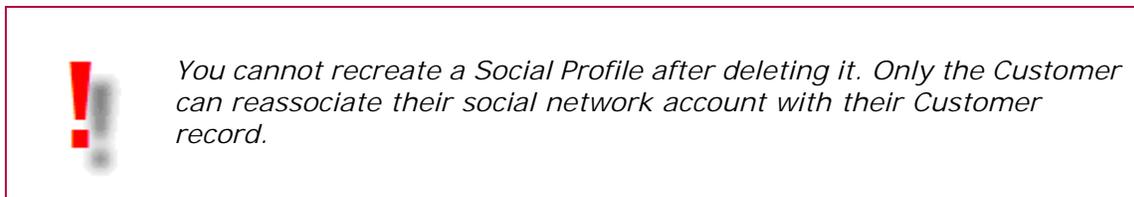
Figure 2-101: Social Profile Detail Window

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:



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.

The screenshot shows the Social Activity Screen for Ms Mary A Relate. The customer details include: Customer Id 30595, Create Date 2013-12-03, Create User Id Tester, Update Date 2013-12-05, Update User Id Tester, Source Facebook, Phone 4402223333, and Email maryrelate@gmail.com. The social activities section shows a table of posts with columns for Date, Social Network, Profile Name, Activity Type, and Message.

Date	Social Network	Profile Name	Activity Type	Message
2013-12-04		MaryRelate	TWEET	My neighbor has my horse Crystal
2013-12-04		MaryRelate	TWEET	Love to ride my horse crystal
2013-12-04		MaryRelate	TWEET	Where's my horse crystal

Figure 2-102: 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.

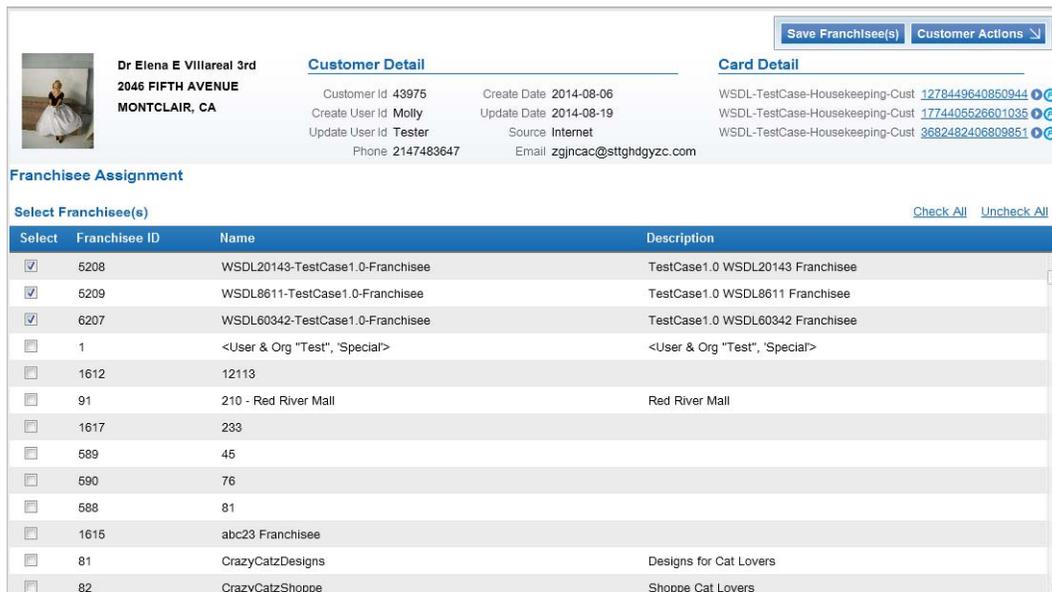


Figure 2-103: Franchisee Assignment Screen

Franchisee Assignment Screen

The Franchisee Assignment screen displays the following information:

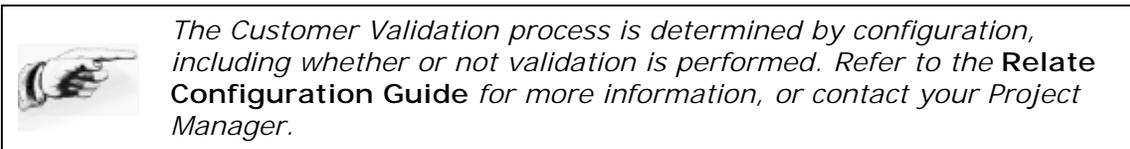
- The [Customer Basics](#) area.
- A [List](#) of Franchisees, displaying the following information for each Franchisee:
 - ❑ **Select** - A [Check Box](#) indicating whether the Customer is assigned to the Franchisee. If there is a check mark () in the field, the Customer is assigned to the Franchisee.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



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.

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 164](#) describes the page used to search for Customers, as well as the search procedure.
- [“Clienteling Customer List” on page 166](#) 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 Menu](#) 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 167 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 .

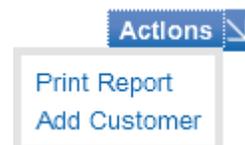
Table 3-1: Customer List Page Key (continued)

Item	Description
6	<p>Customer List - A List of Customers matching the search criteria. Use the Filter Menu to narrow down the List and locate a certain Customer.</p> <p>This List includes the following information for each Customer:</p> <ul style="list-style-type: none"> ■ 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 659](#).
- **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](#).

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 170](#) - 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 172](#) 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 173](#) for more information.
- **Delete** - Delete all of the found duplicates from the currently selected Strategy. [“Delete Duplicates” on page 173](#) 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:

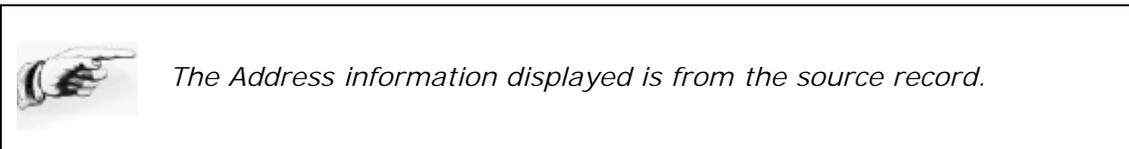
- ❑ **Number of customers per set** - The number of Customers found as possible matches by the [Duplicate Search](#).
- ❑ **set count** - The number of duplicates found.

Once a selection is made, a [List](#) of duplicates is displayed.

Customer Merge Review						
Duplicate Strategy		Name Address				
Strategy Status		Unapproved				
Number of customers per set=set count		2=31				
Dupe Set Seq	First Name	Last Name	Address Line 1	City	State	Postal Code
1	Aditi	Prakash	7135 WITCH HAZEL LN	SOLOON	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

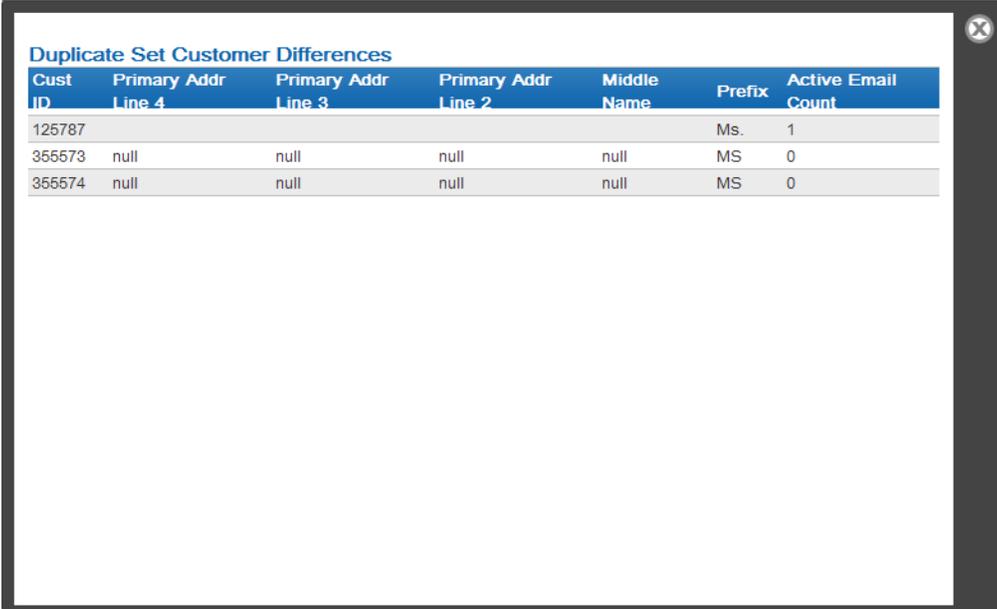
The duplicate [List](#) displays the following information for each duplicate:



- ❑ **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.



Cust ID	Primary Addr Line 4	Primary Addr Line 3	Primary Addr Line 2	Middle Name	Prefix	Active Email Count
125787					Ms.	1
355573	null	null	null	null	MS	0
355574	null	null	null	null	MS	0

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.

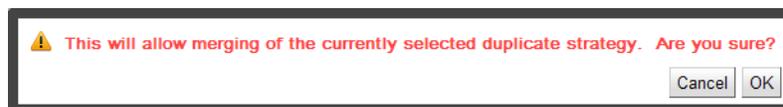


Figure 4-5: Confirmation Window

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.

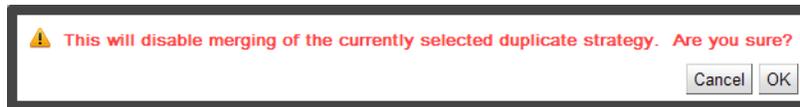


Figure 4-6: Confirmation Window

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.

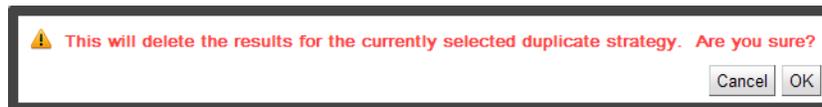


Figure 4-7: Confirmation Window

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.

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 176](#) describes the Customer Gift Registry page.
- [“Customer Gift Registry List” on page 178](#) describes the [List](#) of Customer Gift Registries returned by a [Gift Registry Lookup](#).
- [“Registry Information Window” on page 180](#) describes the information and actions available in the Registry Information [Window](#).
- [“Gift Registry Print” on page 182](#) provides information about the Gift Registry Print page.
- [“Create a Customer Gift Registry” on page 184](#) provides the procedure for creating a Customer Gift Registry.
- [“Edit a Customer Gift Registry” on page 181](#) 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.

Customer Gift Registry

Search Criteria = None

Search Results Registry Status : All Gift Registries

Displaying: 1-22 of 22 1 of 1 Pages Go To Page: GO Page Size: 50 items

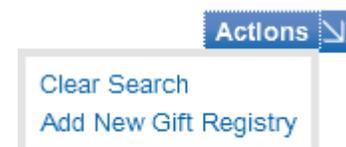
Registry Id	Registry Name	Event Type	Event Date	Venue Name	First Name	Last Name
51	Harrison Baby	BABY_SHOWER	2013-08-01		Jeri	Samons
49	ANDERSON WEDDING	WEDDING_SHOWER	2013-06-17	Hilton	Amanda	Johnson
47	Abbott Baby Boy	BABY_SHOWER	2013-03-24		John	Geer
46	BUTLER WEDDING	WEDDING_SHOWER	2013-02-28		Danette	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.

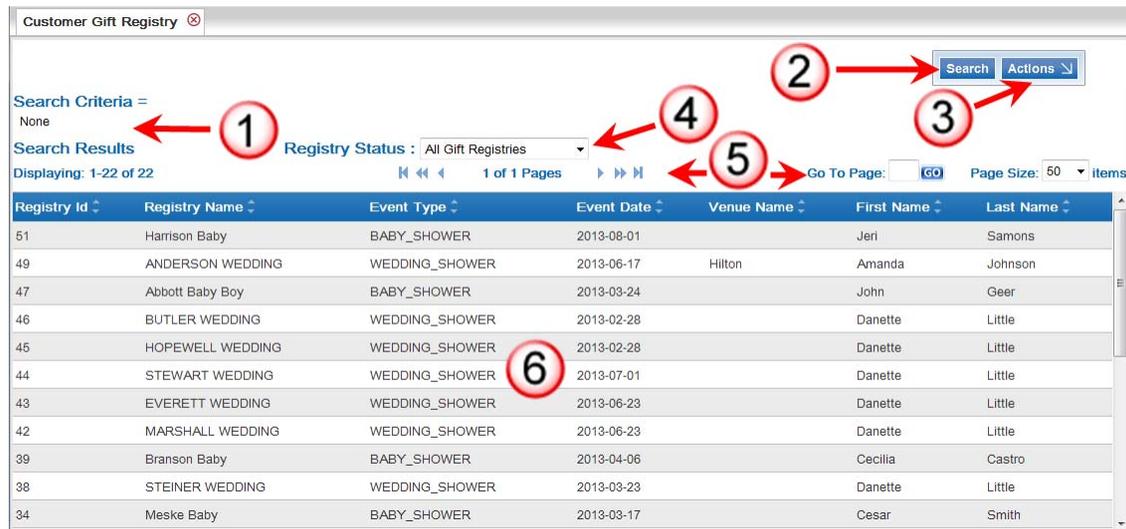


Figure 5-3: Customer Gift Registry List

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 179 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	<p>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.</p> <p>This List includes the following information for each Customer Gift Registry:</p> <ul style="list-style-type: none"> ■ 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:

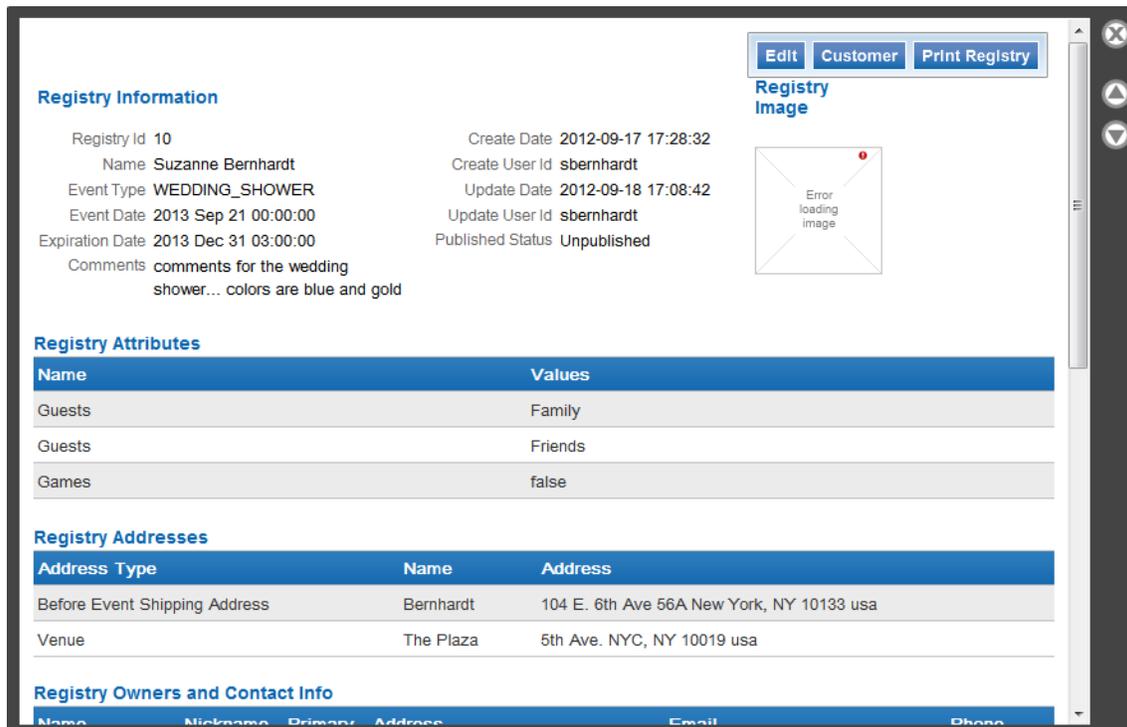


Figure 5-4: Registry Information Window

- **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 make changes through the [Gift Registry Visualizer](#) for the primary owner's Customer record. See "[Open Registry in a Customer Record](#)" on page 181 for instructions on opening the [Gift Registry Visualizer](#).

The following procedures are available in the [Gift Registry Visualizer](#):

- ❑ ["Add an Item" on page 150](#)
- ❑ ["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.

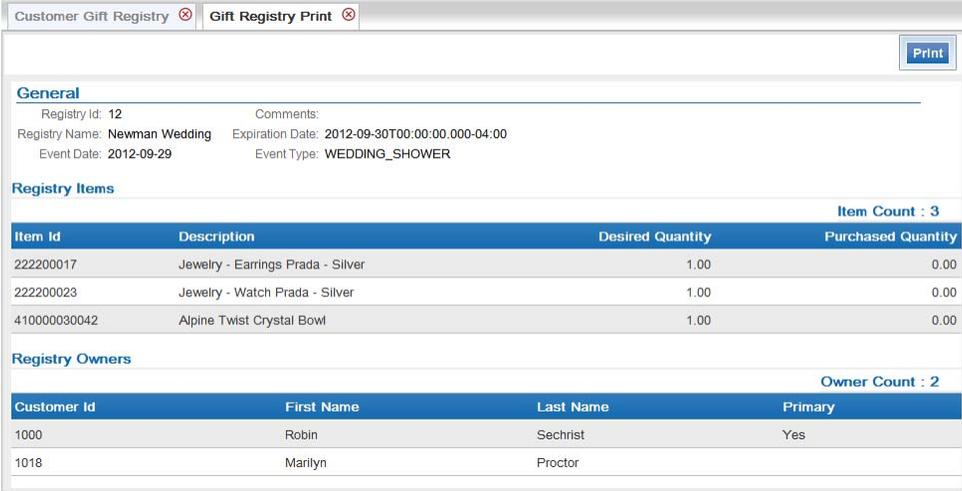
- Use [Wizard Navigation](#) to move through the Gift Registry.
- Make any necessary changes.
- Click **save** when you are finished making changes. The Gift Registry will be saved and Relate will return to the [Customer Gift Registry List](#).
- Click **cancel** to discard the changes, cancel the operation, 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:



The screenshot shows a web application window titled "Gift Registry Print". It contains a "Print" button in the top right corner. The main content is organized into three sections:

- General:** Registry Id: 12, Registry Name: Newman Wedding, Event Date: 2012-09-29, Expiration Date: 2012-09-30T00:00:00.000-04:00, Event Type: WEDDING_SHOWER, and a Comments field.
- Registry Items:** A table with 4 columns: Item Id, Description, Desired Quantity, and Purchased Quantity. It shows 3 items.
- Registry Owners:** A table with 4 columns: Customer Id, First Name, Last Name, and Primary. It shows 2 owners.

Registry Items				Item Count : 3
Item Id	Description	Desired Quantity	Purchased Quantity	
222200017	Jewelry - Earrings Prada - Silver	1.00	0.00	
222200023	Jewelry - Watch Prada - Silver	1.00	0.00	
410000030042	Alpine Twist Crystal Bowl	1.00	0.00	

Registry Owners				Owner Count : 2
Customer Id	First Name	Last Name	Primary	
1000	Robin	Sechrist	Yes	
1018	Marilyn	Proctor		

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.

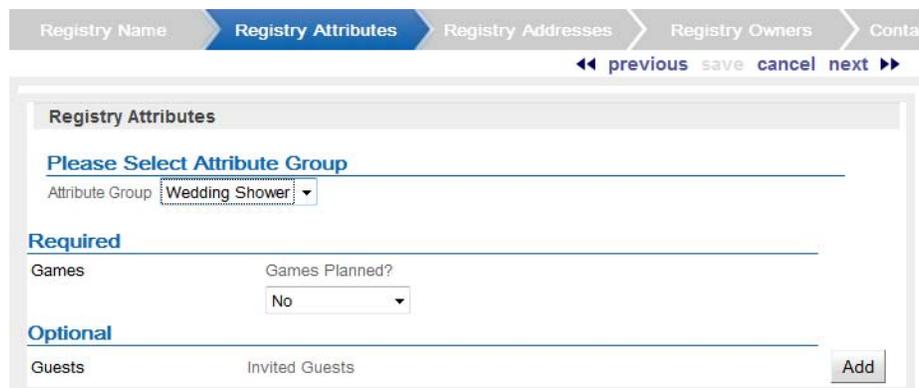


Figure 5-9: Registry Attributes Step - Attribute Group Selected

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.

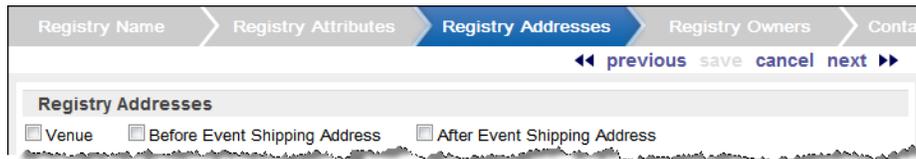


Figure 5-10: Registry Addresses Step

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.

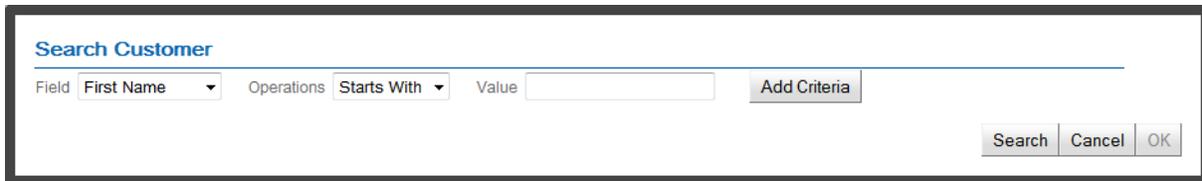


Figure 5-13: Search Customer Window

- 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.

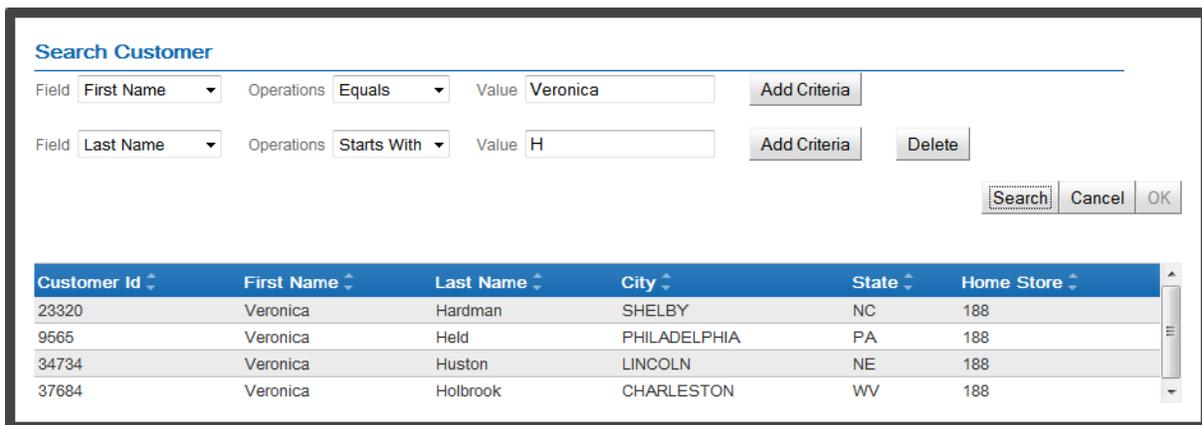


Figure 5-14: Customer Search Results

- 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		<input checked="" type="radio"/>

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.

Registry Addresses > Registry Owners > **Contact Information** > Registry Items > C

◀ previous save cancel next ▶▶

Contact Information

Veronica Hardman [Clear contact information](#)

Address Line 1: 4021 KOOTER LANE	Postal Code: 28150
Address Line 2:	Country:
Address Line 3:	Country: US
Address Line 4:	Email: veronicaghardman@spambob.com
Apartment:	Phone Number: 7044825553
City: SHELBY	Extension:
State: NC	

Harold Schneider [Clear contact information](#)

Address Line 1: 3168 IRVING ROAD	Postal Code: 43323
Address Line 2:	Country:
Address Line 3:	Country: US
Address Line 4:	Email: haroldschneider@trashmail.com
Apartment:	Phone Number: 7404965141
City: HARPSTER	Extension:
State: OH	

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.

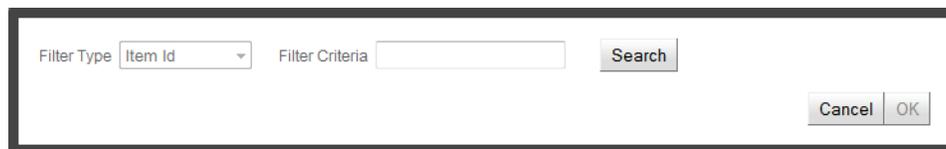


Figure 5-17: Item Entry Window

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.

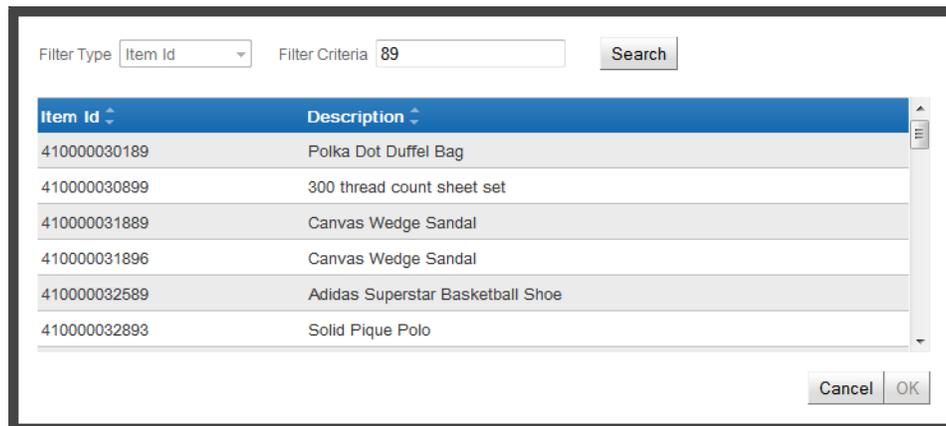


Figure 5-18: Item Search Results

- 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.

Date	Item Id	Desired Quantity	Purchased Quantity	Description
2012 Aug 15 16:47:21	410000030899	1.00	0.00	300 thread count sheet set

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](#).

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 192](#).
- **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 207](#).
- **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 227](#).

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](#).

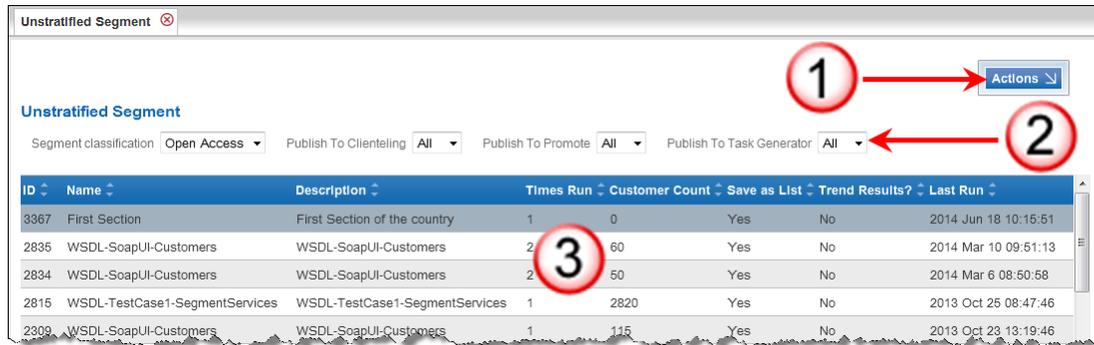


Figure 6-1: Unstratified Segment List

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 193 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 193 for more information.

Table 6-1: Unstratified Segment List Page Key (continued)

Item	Description
<p>3</p>	<p>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.</p> <p>This List includes the following information for each Segment:</p> <ul style="list-style-type: none"> ■ 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 198](#)).
- **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.

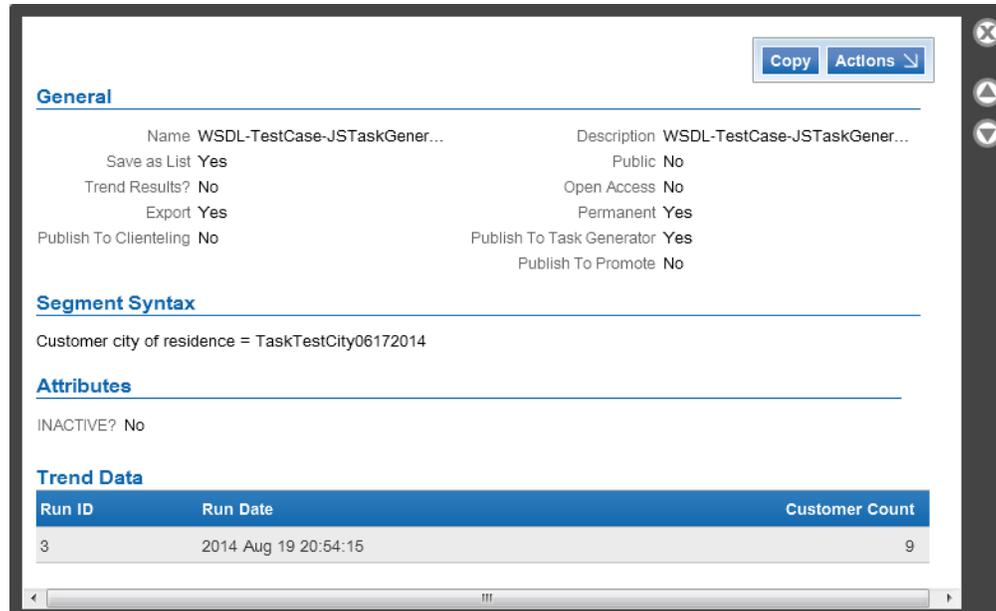


Figure 6-3: Unstratified Segment Window

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.
- **Associated Franchisees** - IDs and names 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](#).

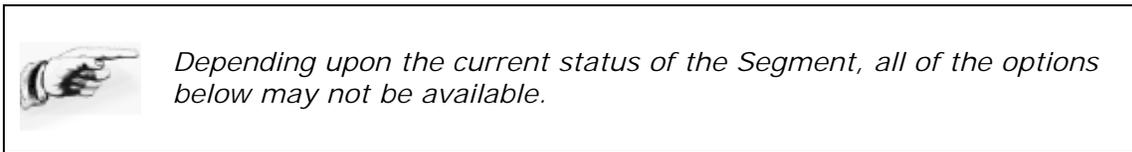
A copy of the Unstratified Segment is opened in the [Create Unstratified Segment Wizard](#), with all the same settings and information as the copied Segment.

- 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 198](#).

Actions Menu

The [Actions Menu](#) in the Unstratified Segment [Window](#) has the following options:



- **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 198 for further information about editing the Segment.

- **Delete** - Deletes the Segment.

A confirmation prompt opens, asking whether to delete the segment.

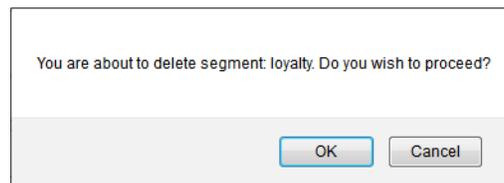


Figure 6-5: Delete Confirmation Prompt

- 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.

```

Show sql
create table #cust_seg_900_207_0 (CUST_ID varchar(32) NOT NULL, HOUSEHOLD_KEY char(28), CONSTRAINT
cusid_unique_900_207_0 UNIQUE(CUST_ID));

insert into #cust_seg_900_207_0 (CUST_ID, HOUSEHOLD_KEY) select DISTINCT cst_customer.CUST_ID ,
CST_HOUSEHOLD.HOUSEHOLD_KEY from cst_customer with (nolock) left join CST_HOUSEHOLD ON
CST_CUSTOMER.CUST_ID = CST_HOUSEHOLD.CUST_ID and CST_HOUSEHOLD.organization_id=
cst_customer.organization_id where cst_customer.organization_id=900 and ( ( cst_customer.active_flag = 1 AND
cst_customer.cust_id in (SELECT distinct trn_transaction.cust_id FROM trn_transaction WHERE trn_transaction.cust_id IS
NOT NULL AND trn_transaction.organization_id = cst_customer.organization_id AND (DATEDIFF( d,
trn_transaction.business_date, GETDATE())) <= 30));

insert into qry_customer_segment (organization_id, user_query_id, run_id, cust_id, strat_lvl_id, strat_value, run_date,
HOUSEHOLD_KEY) select 900, 207, 0, cust_id, 0, 0, GETDATE(), HOUSEHOLD_KEY from #cust_seg_900_207_0 with
(nolock);

drop table #cust_seg_900_207_0;

insert into qry_customer_trend_total (organization_id, user_query_id, run_id, strat_lvl_id, customer_count, run_date) select
900, 207, 0, 0, count(qry_customer_segment.cust_id), GETDATE() from qry_customer_segment where organization_id=900
and user_query_id=207 and run_id=0;

select sum(customer_count) from qry_customer_trend_total where organization_id=900 and user_query_id=207 and run_id=0;

```

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 163](#) 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.*

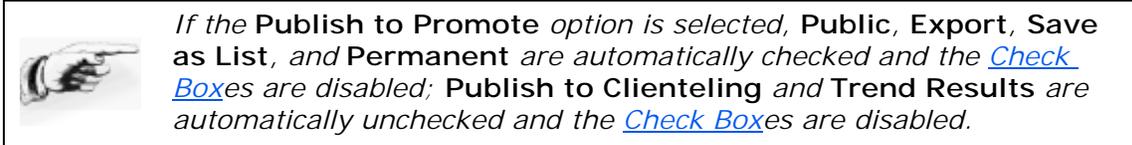
- Export** - Determines whether the Segment results will be automatically exported after the Segment Query is run.



*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.



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 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 **Check All**.

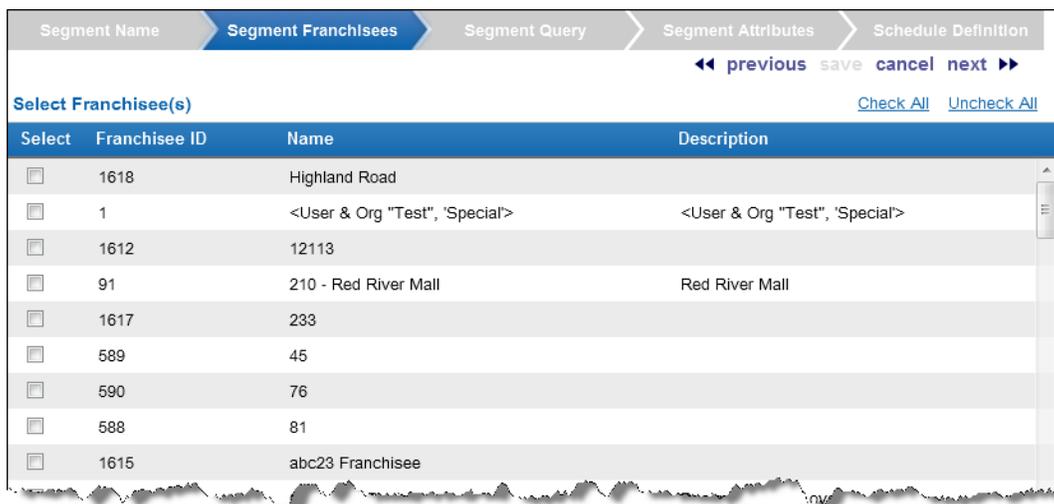


Figure 6-8: Segment Franchisees

5. Click **next** when you are finished.
The Segment Query step opens.

6. Build the Segment Query:

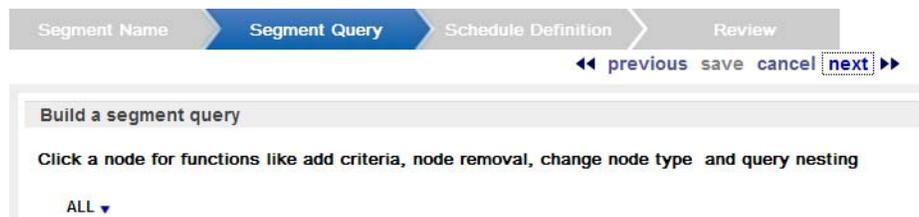


Figure 6-9: Segment Query

- 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 677](#) for more information about criteria group organization.

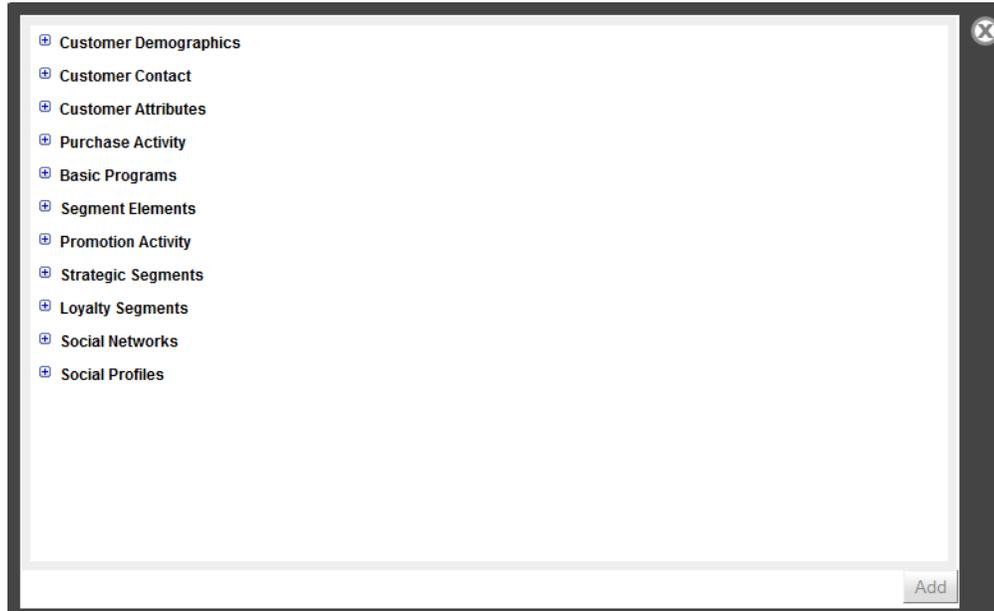


Figure 6-10: Criteria Selection Window

- 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 677](#) for more information about criteria fields.

ALL ▼
 Logical Attribute Values ▼
 Customers with attribute name
 having value ▼
 Lifetime Sales ▼
 Total sales = ▼
 Happy Anniversary ▼
 Sign-up Month ▼

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 199](#)), 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 565](#) 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

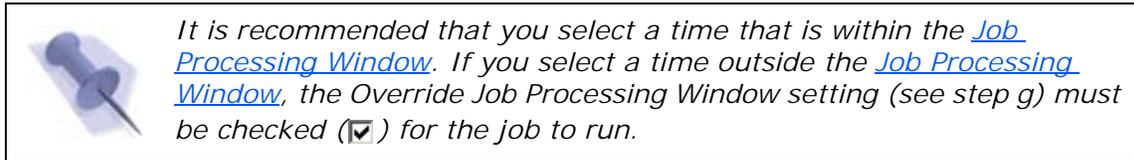
- b. Select or enter the configuration values for each of the **Required** Attributes.
 - c. Add any necessary **Optional** Attribute(s):
 - 1) Click the **Add** button for the Attribute to add.
A configuration field opens.
 - 2) Select or enter the configuration value for the Attribute.
 - 3) Repeat 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 199](#)).*
 - **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 199](#)).*
 - **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.



- 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](#).

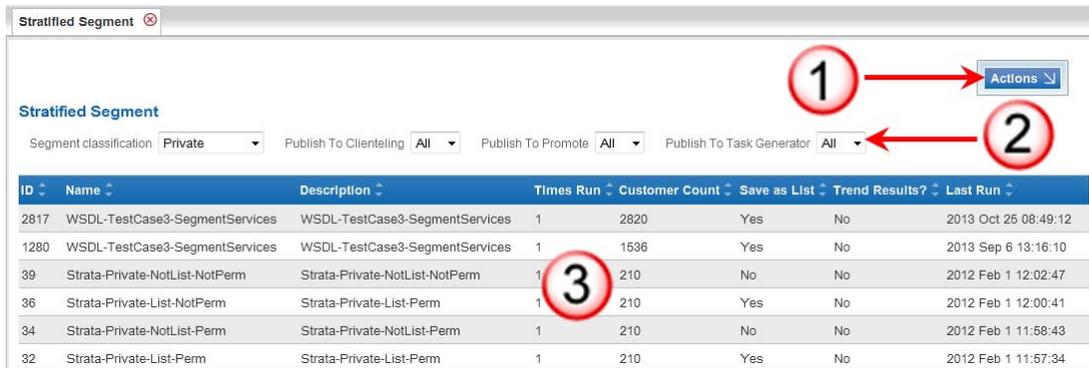


Figure 6-18: Stratified Segment List

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 197 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 208 for more information.

Table 6-2: Stratified Segment List Page Key (continued)

Item	Description
3	<p>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.</p> <p>This List includes the following information for each Segment:</p> <ul style="list-style-type: none"> ■ 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 214](#).
- **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.

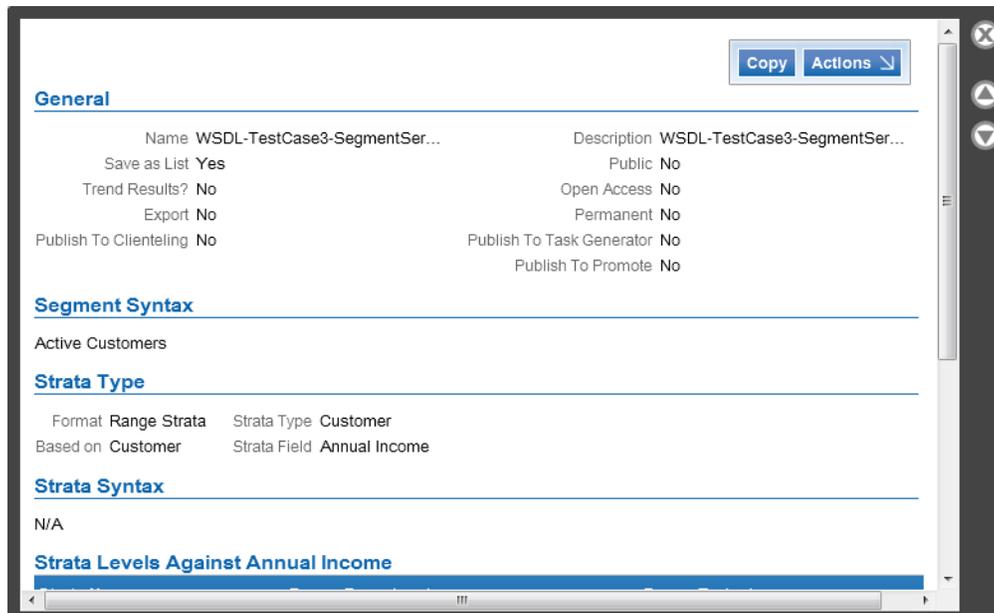


Figure 6-20: Stratified Segment Window

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.
- **Associated Franchisees** - IDs and names 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.

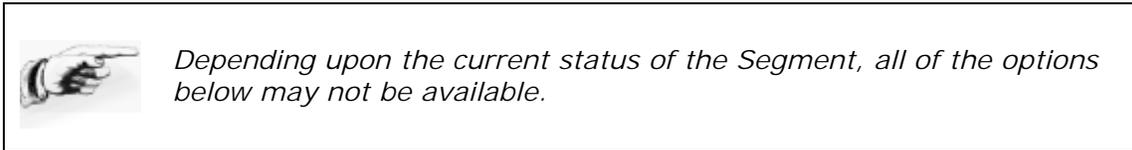
A copy of the Stratified Segment is opened in the [Create Stratified Segment Wizard](#), with all the same settings and information as the copied Segment. For more information about the fields and information to be entered, see ["Create Stratified Segment" on page 214](#).

- 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 214](#).

Actions Menu

The [Actions Menu](#) in the Stratified Segment [Window](#) has the following options:



- **EXPORT** - Exports the results after a Segment is run.

A confirmation prompt opens, asking whether to export the Segment.

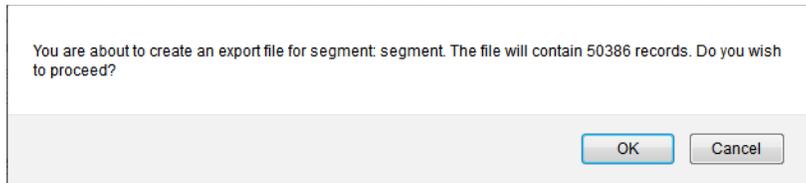


Figure 6-21: Export Confirmation Prompt

- 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 214](#) 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.

```

Show sql
create table #cust_seg_900_26_0( CUST_ID varchar(32) NOT NULL, CONSTRAINT custid_unique_900_26_0 UNIQUE
(CUST_ID)) ;

insert into #cust_seg_900_26_0 (cust_id) select cst_customer.cust_id from cst_customer where
cst_customer.organization_id=900 and ( ( cst_customer.cust_id IN (SELECT cst_address.cust_id FROM cst_address
WHERE cst_customer.organization_id = cst_address.organization_id AND cst_address.postal_code = '44056' ) ));

insert into qry_customer_segment (organization_id, user_query_id, run_id, cust_id, strat_lvl_id, strat_value, run_date)
select 900, 26, 0, cust_id, 0, 0, GETDATE() from #cust_seg_900_26_0 with (nolock) ;

drop table #cust_seg_900_26_0 ;

update qry_customer_segment set strat_value=(select cst_customer.ytd_sales_amt from cst_customer where
cst_customer.organization_id=900 and qry_customer_segment.cust_id = cst_customer.cust_id and
cst_customer.organization_id=900 and qry_customer_segment.cust_id = cst_customer.cust_id ) WHERE
qry_customer_segment.organization_id=900 and qry_customer_segment.user_query_id=26 and
qry_customer_segment.run_id=0 ;

with CUST_SEG_WITH_ROWNUM as ( select *, row_number() over ( order by strat_value ASC ) as rownum from
qry_customer_segment where organization_id=900 and user_query_id=26 and run_id=0 and strat_lvl_id = 0 ) update
CUST_SEG_WITH_ROWNUM set strat_lvl_id=1 where rownum<=1 ;

insert into qry_customer_trend_total (organization_id, user_query_id, run_id, strat_lvl_id, customer_count, min_value,
max_value, avg_value, run_date) select 900, 26, 0, 1, count(qry_customer_segment.cust_id), min(strat_value), max
(strat_value), avg(strat_value), GETDATE() from qry_customer_segment where organization_id=900 and user_query_id=26

```

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 be made available to the [Clienteling](#) module. See [Chapter 3, "Clienteling" on page 163](#) 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.*

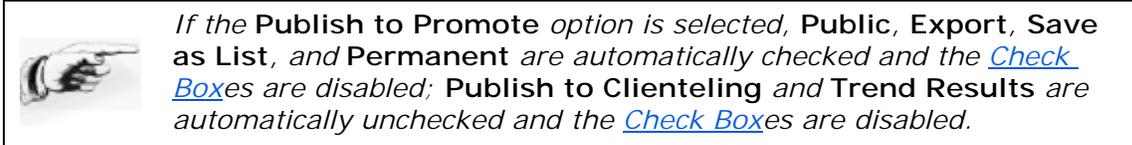
- Export** - Determines whether the Segment results will be automatically exported after the Segment Query is run.



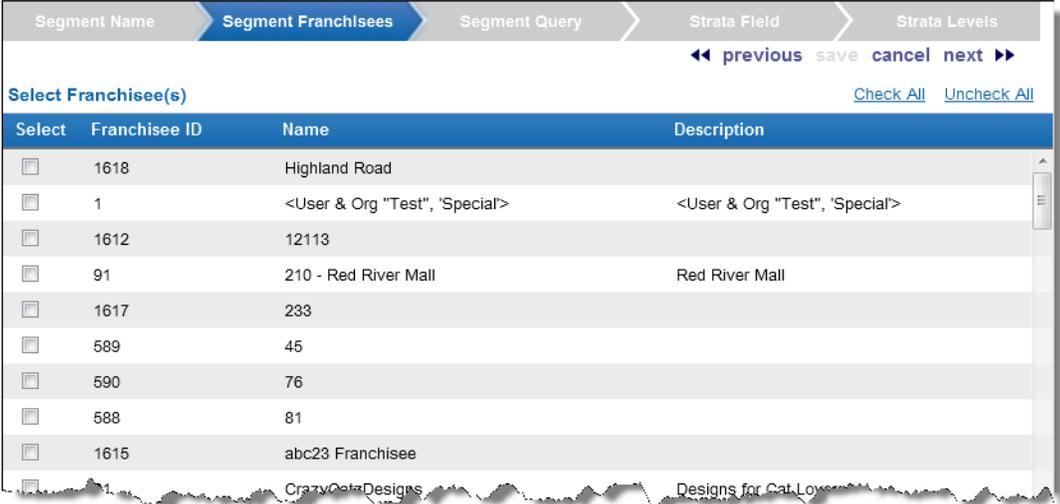
*If the **Export** option is selected, **Save as List** is automatically checked and the [Check Box](#) is disabled; **Open Access** and **Trend Results** are automatically unchecked and the [Check Boxes](#) are disabled.*

- 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.



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 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 **Check All**.



Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1618	Highland Road	
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	590	76	
<input type="checkbox"/>	588	81	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	1611	Crazy Cats Designs	Designs for Cat Lovers

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 677](#) for more information about criteria group organization.

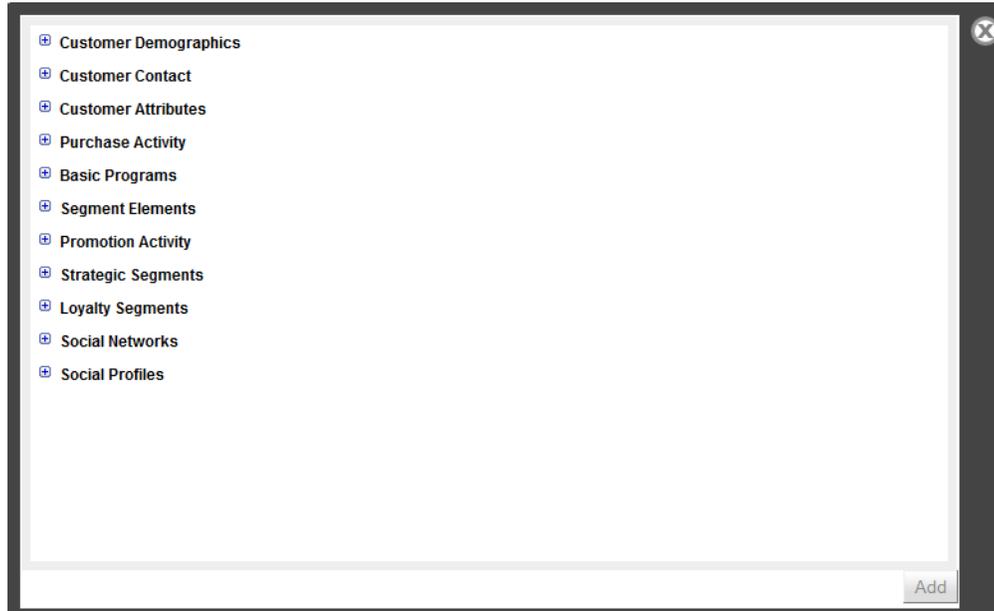


Figure 6-27: Criteria Selection Window

- 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 677](#) for more information about criteria fields.

ALL ▼
 Logical Attribute Values ▼
 Customers with attribute name
 having value ▼
 Lifetime Sales ▼
 Total sales =
 Happy Anniversary ▼
 Sign-up Month ▼

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 215](#)), 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 677](#) 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 677](#) 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 215](#)), 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 565](#) 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.

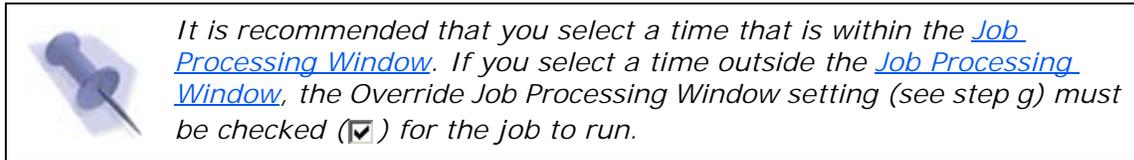
17. When you have completed configuring the Attributes, click **next** to continue.

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 215](#)).*
 - **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 215](#)).*
 - **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.



- 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](#).

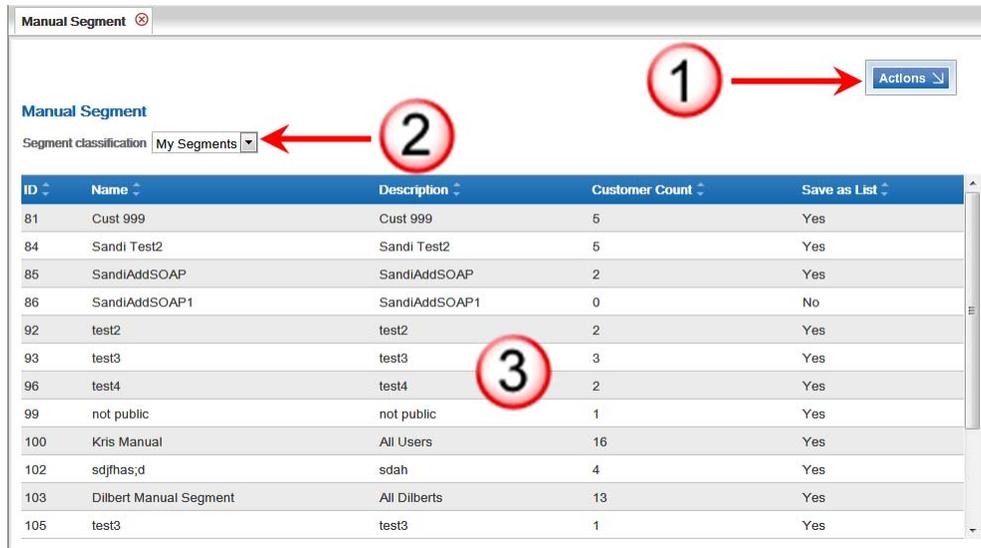


Figure 6-37: Manual Segment List

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 228 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 228 for more information.

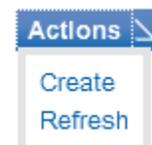
Table 6-3: Manual Segment List Page Key (continued)

Item	Description
3	<p>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.</p> <p>This List includes the following information for each Segment:</p> <ul style="list-style-type: none"> ■ 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 230](#)).
- **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.

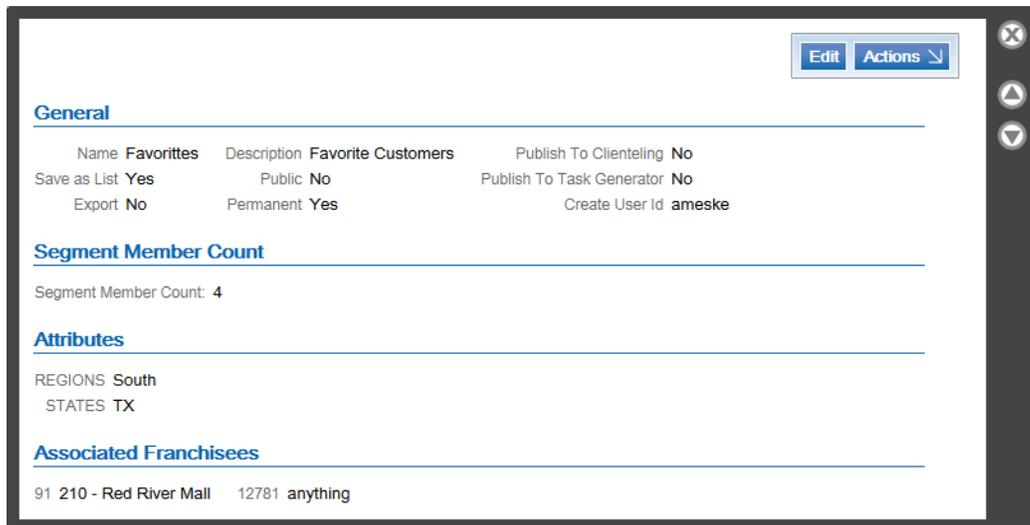


Figure 6-38: Manual Segment Window

The following information is displayed in the Manual Segment [Window](#):

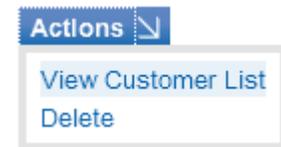
- **General** - General information about the Segment. This area includes the following information:
 - Name** - Name of the Segment.
 - Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. For Manual Segments, this value is always set to **Yes**.
 - 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.
- **Associated Franchisees** - IDs and names 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 235](#).
- **DELETE** - Delete the Manual Segment from the system. See [“Delete Manual Segment” on page 236](#).



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.

 A screenshot of the 'Create Segment: New' wizard. The wizard has a progress bar at the top with four steps: 'Segment Name' (selected), 'Segment Franchisees', 'Segment Attributes', and 'Segment Members'. Below the progress bar, there are navigation buttons: 'previous', 'save', 'cancel', and 'next'. The main content area is titled 'Enter segment name and information' and contains the following fields: 'Name' (text input), 'Description' (text input), 'Public' (checkbox), 'Publish To Clienteling' (checkbox), and 'Publish To Task Generator' (checkbox). On the left side, there is a sidebar with a tree view showing 'Segment Name' (selected), 'Segment Franchisees' (No franchisees defined), 'Segment Attributes' (No attributes defined), 'Segment Members' (Segment Member Count 0), and 'Review' (Review).

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 163](#) 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 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 **Check All**.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1618	Highland Road	
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	590	76	
<input type="checkbox"/>	588	81	
<input type="checkbox"/>	1615	abc?? Franchisee	

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 565](#) 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.

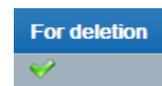
Figure 6-44: Search Customer Window

- 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.

Customer Id	First Name	Last Name	City	State	Home Store
23320	Veronica	Hardman	SHELBY	NC	188
9565	Veronica	Held	PHILADELPHIA	PA	188
34734	Veronica	Huston	LINCOLN	NE	188
37684	Veronica	Holbrook	CHARLESTON	WV	188

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 230](#) 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 230](#) 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.

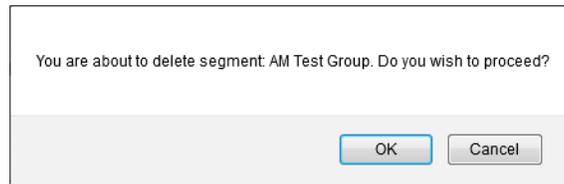


Figure 6-46: Delete Manual Segment Confirmation Prompt

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](#).

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 191](#) 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](#).

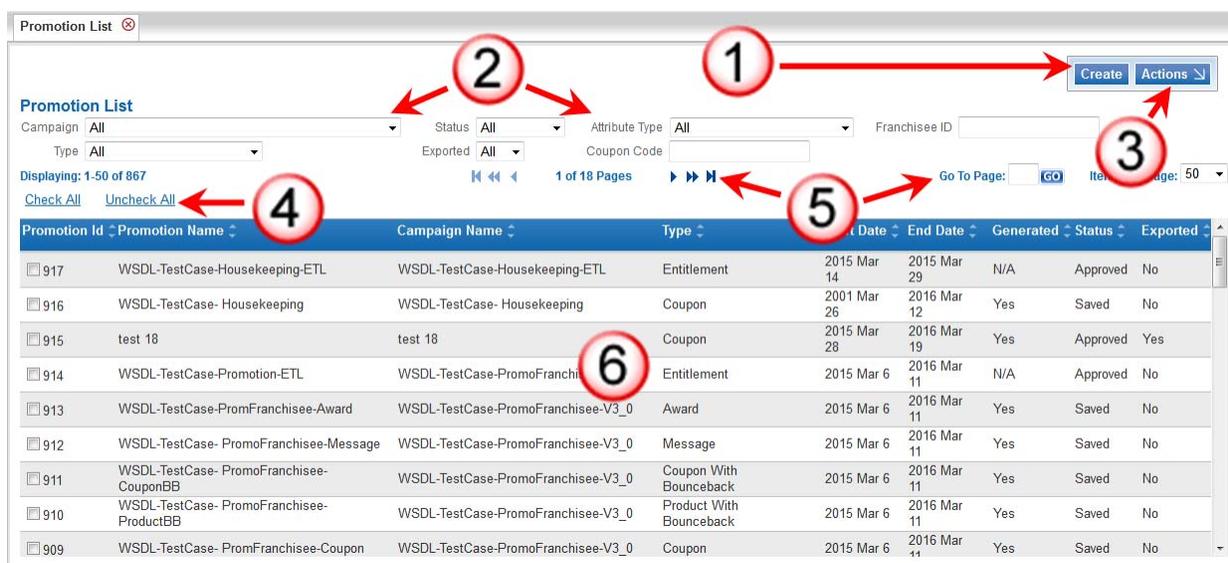


Figure 7-1: Promotions List

Table 7-1: Promotion List Page Key

Item	Description
1	Create Button - Click to create a new Promotion. See “Create a Promotion” on page 243 for more information.

Table 7-1: Promotion List Page Key (continued)

Item	Description
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 241 for more information.
3	Actions Menu - Click to open a menu of actions that can be performed in the Promotion List page. See “Actions Menu” on page 240 for more information.
4	Check Options - Links to place or remove a check mark (<input checked="" type="checkbox"/>) in each Check Box displayed in the current screen.
5	Page Navigation - Page Navigation for the List .
6	<p>Promotions - A List of Promotions currently in the system. Use the Filter Menus to narrow down the List and locate a certain Promotion.</p> <p>This List includes the following information for each Promotion:</p> <ul style="list-style-type: none"> ■ 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 242](#).
- **Terminate** - Terminate selected Promotion(s). See [“Bulk Terminate” on page 242](#).
- **Export** - Export selected Promotion(s). See [“Bulk Export” on page 242](#).
- **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 by the Coupon Code assigned to the Promotion.
- **Franchisee ID** - Filters the [List](#) to by the ID of the Franchisee assigned to the Promotion.

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 244](#)).

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 269](#).
- **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 291](#).
- **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 313](#).



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 339](#).
- **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 365](#).
- **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 383](#).
- **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 405](#).

Promotion Window

The Promotion [Window](#) displays information about the selected Promotion and provides access to actions that can be performed on the Promotion.

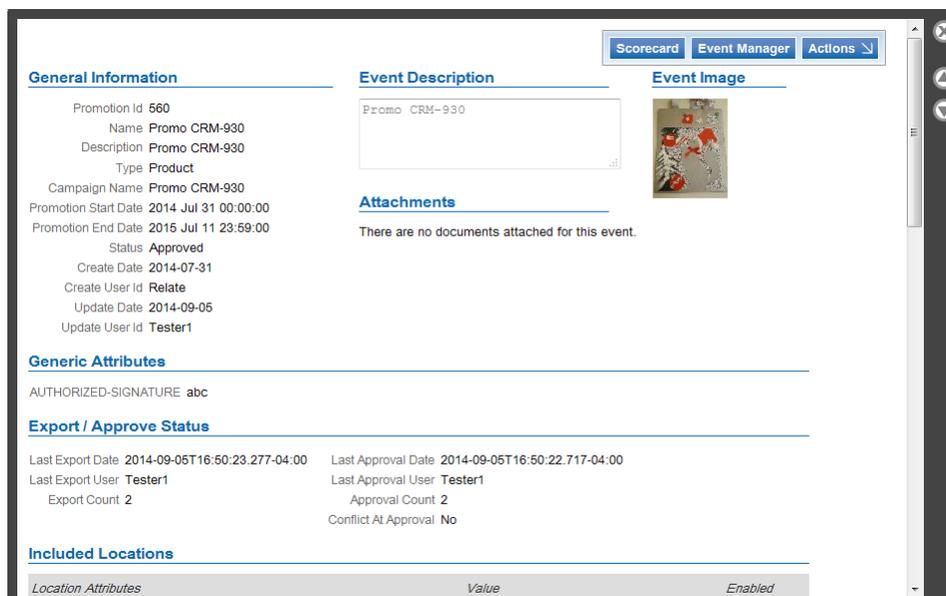
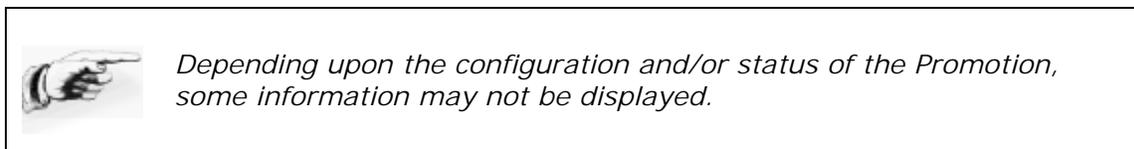


Figure 7-4: Promotion Window

The Promotion [Window](#) can include the following information about the Promotion:



- **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 421](#) 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.
- **Associated Franchisees** - The Franchisees assigned to the Promotion.
 - ID of the Franchisee
 - Name of the Franchisee.
- **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.

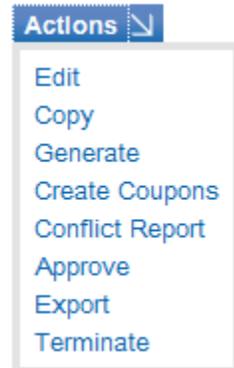
Actions Menu

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 249](#).
- **Copy** - Open an editable copy of the Promotion. See [“Copy a Promotion” on page 250](#).
- **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 251](#).
- **Create Coupons** - Create additional Serialized Coupons for the Promotion (this option only appears if the Promotion awards Serialized Coupons). See [“Create Coupons” on page 251](#).
- **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 252](#).
- **Approve** - Approve the Promotion (this option only appears if the Promotion has not been approved). See [“Approve a Promotion” on page 253](#).
- **Export** - Export the Promotion. See [“Export a Promotion” on page 253](#).
- **Terminate** - Terminate the Promotion. See [“Terminate a Promotion” on page 253](#).

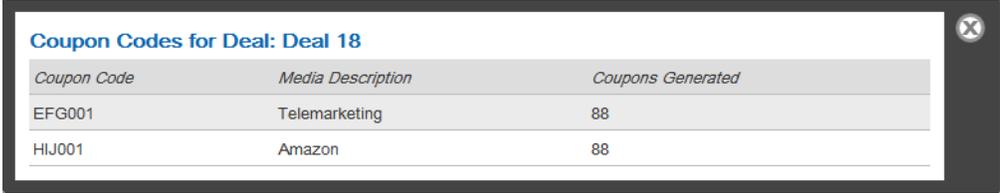


View Coupon Codes

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.



Coupon Codes for Deal: Deal 18		
Coupon Code	Media Description	Coupons Generated
EFG001	Telemarketing	88
HIJ001	Amazon	88

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 243](#).

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**.

Current End Date 2012 Apr 20 23:59:00

End Date

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 Menu](#).
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 243](#).

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 595](#) 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.

Deal Id	Deal Name	Deal Type	Coupon Code	Current Count	Additional Coupons
182	MK 913 Subtotal	SUBTOTAL_DISCOUNT	AB001	23	<input type="text" value="0"/>
183	MK Test	LINE_ITEM_DISCOUNT	AB002	20	<input type="text" value="0"/>

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 595](#) 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.

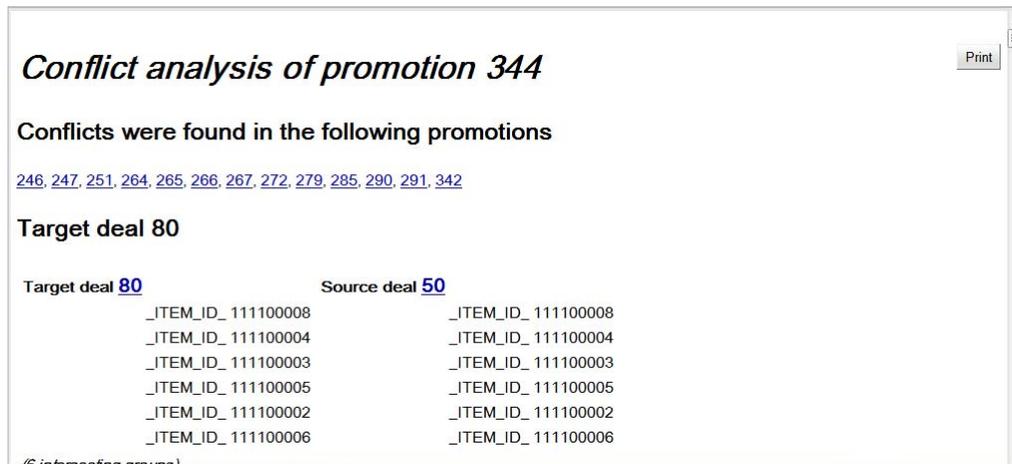


Figure 7-10: Conflict Report

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.

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 may 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.
 - [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.

Scorecard

The Scorecard tab displays the following information:

Scorecard | Facebook Scorecard | Twitter Scorecard

Promotion Scorecard: AnotherETTest (268)
 Campaign Id 252 | Promotion Id 268
 Campaign Name AnotherETTest | Promotion Name AnotherETTest

Response Summary

Active Customers

Target Name	Total	Sent	Opened	Clicked	Undeliverable	E-mail Channel Details							
						Net Targeted	Net Delivery	Respondents	Non-Respondents	Net Response Rate	Response Rate	Award Value	Redeemed Award Value
NewTest	4	3	0	0	0	4	3	0	4	0.00	0.00		

Inactive Customers

Target Name	Total	Sent	Opened	Clicked	Undeliverable	E-mail Channel Details							
						Net Targeted	Net Delivery	Respondents	Non-Respondents	Net Response Rate	Response Rate	Award Value	Redeemed Award Value
NewTest	1	1	0	0	0	1	1	0	0	0.00	0.00		

Financial Summary

Target	Direct	Indirect	Total	Cost Of Goods	Gross	Margin	Promotion	Net
--------	--------	----------	-------	---------------	-------	--------	-----------	-----

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.
 - **Sent** - Number of emails sent.
 - **Opened** - Number of emails opened.
 - **Clicked** - Number of emails clicked on.
 - **Undeliverable** - Number of emails that could not be delivered.
 - **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.
 - **Sent** - Number of emails sent.
 - **Opened** - Number of emails opened.
 - **Clicked** - Number of emails clicked on.
 - **Undeliverable** - Number of emails that could not be delivered.
 - **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.

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:

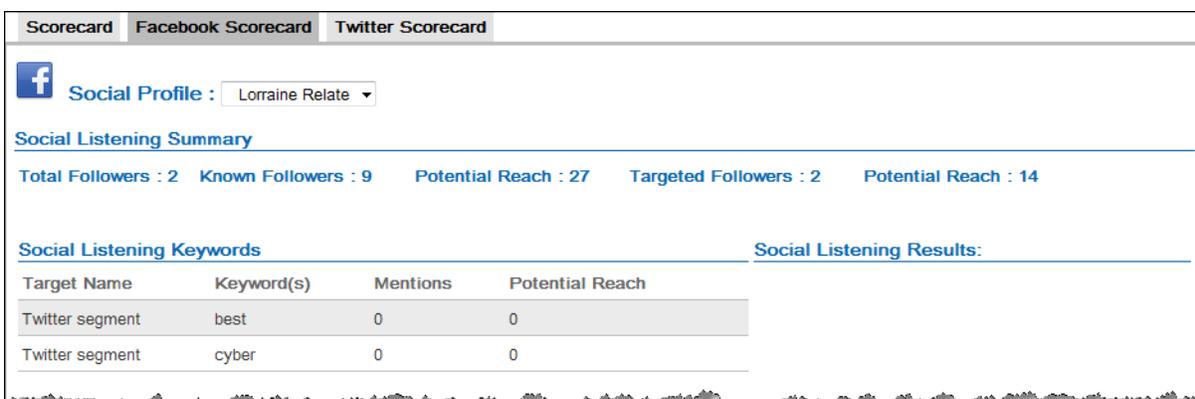


Figure 7-12: Facebook Scorecard Tab

- **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 7-13: 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:

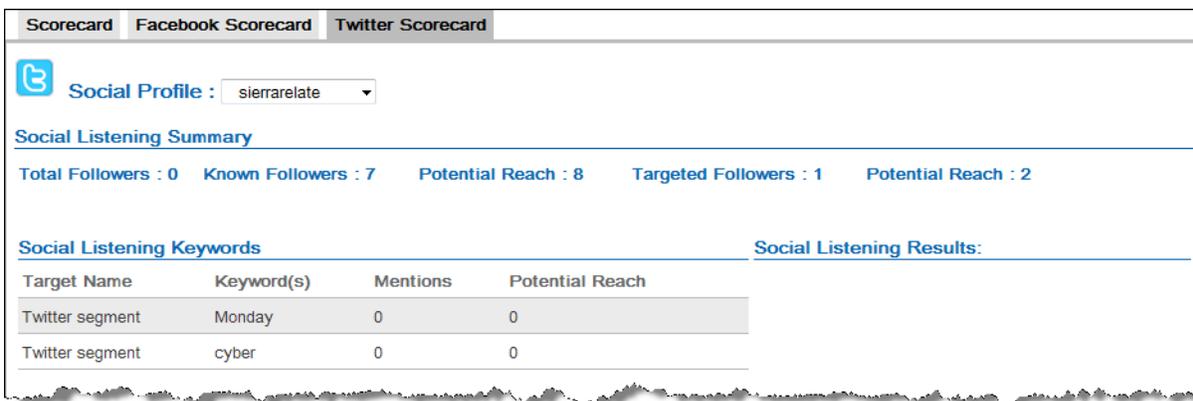


Figure 7-14: Twitter Scorecard Tab

- **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 7-15: 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:

Task Id	Customer Id	First Name	Last Name	Email	Phone Number	Status
17893	44134	Orin	Moses	mmb100002@windstream.net	9436779212	IN_PROGRESS
21119	44410	Sandra	Breckingridge			OPEN
21120	30280	David	Back	davidgback@spambob.com		CANCELLED
21121	38335	George	Gallardo	richard.d.white@dodgit.com	6174223756	CLOSED

Figure 7-16: Event Manager

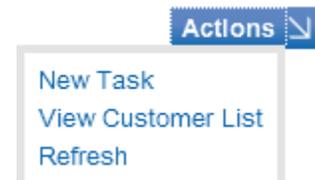
- **General Information** - General Information about the Promotion Event. This includes the following:
 - ❑ **Promotion Id** - ID of the Promotion.
 - ❑ **Name** - Name of the Promotion.
 - ❑ **Description** - Description of the Promotion.
 - ❑ **Type** - Promotion type.

- 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.

Create New Task [Save] [Actions]

Task Type: Creator: ameske Status:

Start Date: Start Time: : Duration:

End Date: End Time: :

Subject: Priority:

Location: Event:

Assigned User		
User ID	Name	Email

Assigned Customer					
Customer Id	First Name	Last Name	City	State	Home Location

Notes			
Notes	Note Type	Create User Id	Create Date

Figure 7-17: 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 585](#).

- 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 Menu](#) cannot be edited directly.

3. If necessary, assign a User to the Task (see [“Add/Change User” on page 588](#)). 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 589](#)). 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 590](#)). 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.

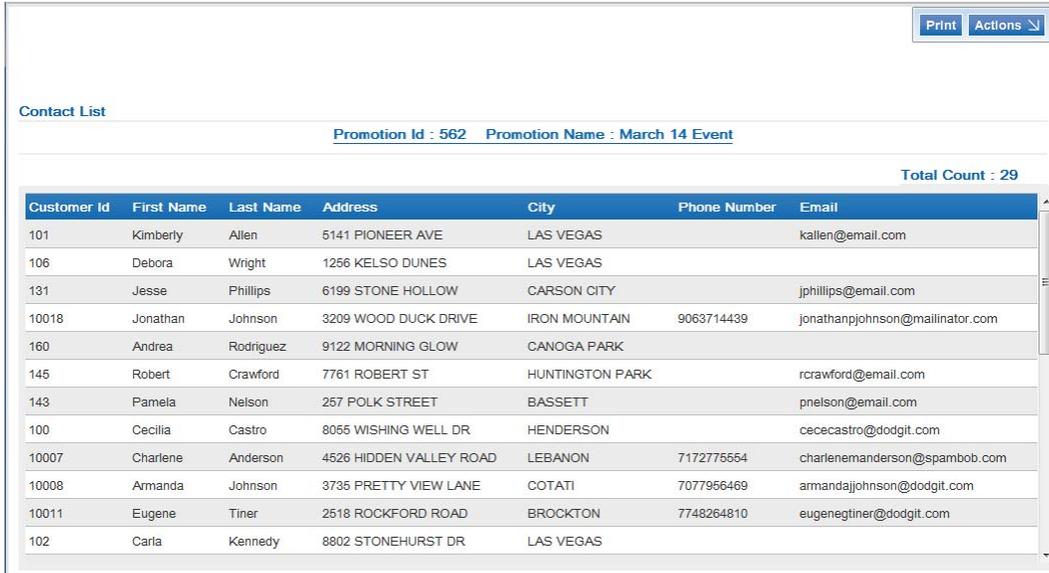
6. Click **SAVE** to create the Task and close the [Window](#).

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.



The screenshot shows a web interface for a 'Contact List'. At the top right, there are 'Print' and 'Actions' buttons. Below the title 'Contact List', it displays 'Promotion Id : 562' and 'Promotion Name : March 14 Event'. A 'Total Count : 29' is shown on the right. The main content is a table with the following data:

Customer Id	First Name	Last Name	Address	City	Phone Number	Email
101	Kimberly	Allen	5141 PIONEER AVE	LAS VEGAS		kallen@email.com
106	Debra	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	jonathanjohnson@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	7172775564	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 7-18: 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:

Edit Task [Save] [Customer] [Actions]

Task Type: Creator: **Relate** Status:

Start Date: Start Time: : Duration:

End Date: End Time: : Update User Id

Subject: Priority: Update Date

Location: Event:

Assigned User

User ID	Name	Email
rmartin	rmartin	rmartin@micros-retail.com

Assigned Customer

Customer Id	First Name	Last Name	City	State	Home Location
106	Debora	Wright	LAS VEGAS	NV	463

Notes

Notes	Note Type	Create UserId	Create Date
-------	-----------	---------------	-------------

Figure 7-19: 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 588](#).
 - To delete an assigned User, see ["Remove a User" on page 589](#).
 - ❑ **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 589](#).
 - To delete a Customer association, see ["Remove a Customer" on page 590](#).
 - ❑ **Notes** - A [List](#) containing Notes added to the Task.
 - To add a note to a Task, see ["Add a Note" on page 590](#).
3. Click the **Save** button when you are finished.
The changes are saved and the [Window](#) closes.

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.

The screenshot shows the 'New Promotion Wizard' interface. The 'Promotion Type' step is selected in the breadcrumb trail. The main content area displays the 'Promotion Type' section with the following options:

- Coupon Enable Serialized Coupon Management
- Product
- Coupon With Bounceback
- Product With Bounceback
- Message
- Award
- Entitlement

The left sidebar shows the navigation menu with 'Promotion Type' selected. The breadcrumb trail at the top includes: Promotion Type, General Information, Campaign, Start / End Date, Generic Attributes, and Associate.

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.

☞ Associate promotion with existing campaign

Campaigns

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.

☞ Create a new campaign for this promotion

Name

Description

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:

General Information Campaign **Start / End Date** Generic Attributes Assoc

◀◀ previous save cancel **next** ▶▶

Start Date

Start Time :

End Date

End Time :

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**.

- ❑ If Franchisee support is not enabled, the Generic Attributes step opens. Continue with step 13.

- ❑ If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

11. Select the Franchisee(s) to associate with the Promotion.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	12781	anything	anything
<input type="checkbox"/>	14293	CATSRUS	
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers
<input type="checkbox"/>	1107	Dairy Queen - Chicago	Dairy Queen - Chicago
<input type="checkbox"/>	1106	Dairy Queen - Georgia2	Dairy Queen - Georgia
<input type="checkbox"/>	1112	Dairy Queen - Houston	Franchisee DQ - Houston TX
<input type="checkbox"/>	607	Dairy Queen - Marietta	Dairy Queen Marietta

Figure 8-7: Promotion Franchisees Step

12. Select **next**.

The Generic Attributes step opens.

13. Select or enter the configuration values for each of the **Required** Attributes.

Generic Attributes

Required

Back to School Back to School

Optional

ST LOC ATTRIBUTE ST LOC ATTRIBUTE
 st date st date

Figure 8-8: Generic Attributes Step

14. Configure any necessary **Optional** Attribute(s):

- ❑ To Add an Attribute:
 - 1) Select the **Add** button for the Attribute.
A configuration field opens.
 - 2) Select or enter the configuration value for the Attribute.
- ❑ To delete an Attribute, select the **Delete** button for the Attribute.
The Attribute is deleted.

15. Select **next**.

The Associated Locations step opens.

16. Define the Location Eligibility Rules for the Promotion.

Figure 8-9: 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](#).

17. Click **next**.

The Associate Deals step opens.

18. Add the Deal(s) for the Promotion:

Figure 8-10: Associate Deals Step

- e. Click the **Add** button.

A Deal [List Window](#) opens.

Deal Id	Deal Name	Deal Type
10595	Deal 725	Item Price Override
10594	BuyXGetY	Buy X Get Y
10593	test	Transaction Discount
10092	WSDL-Deal-11	Nth Item discount
10091	WSDL-Deal-10	Buy X Get Set
10088	WSDL-Deal-9	Item Price Override
10087	WSDL-Deal-7	Buy X Get Y
10086	WSDL-Deal-6	Buy X Get X
10085	Culinary Deal 2	Line Item Discount
10084	Culinary	Line Item Discount
9583	test	Tiered Discount
9582	SeaWorld-FreeRental	Transaction Discount
9581	SeaWorld-10% Merchandise Discount	Line Item Discount
9580	SeaWorld-Rides	Line Item Discount

Figure 8-11: 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 8-12: 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	<input type="text"/>	<input checked="" type="checkbox"/>

Figure 8-13: Deal Added

- i. If necessary, return to step e to add another Deal to the Promotion.
19. 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](#).
20. For each Deal in the Associated Deals [List](#), use the **Enabled** [Check Box](#) to select whether the Deal will be active in the Promotion.
21. Click **next**.
- The Promo-Deal Attributes step opens.
22. Configure the Promo-Deal Attributes for the Promotion event:

Figure 8-14: 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 23.
 - 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).
23. Click **next**.
- The Coupon Codes step opens.

24. For each Deal, define the Coupon Code to associate with the Deal:

Figure 8-15: 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.

25. For each Deal, enter a **Media Description** for the Deal's Coupons.

26. If **Enable Serialized Coupon Management** was not enabled, enter the **Estimated Distribution** for each of the Coupons in the Promotion.

27. To add a new set of Coupons to the Deal, click the **Add** [Link](#), then repeat steps 24-25 for the new Coupon.

28. To delete an unneeded set of Coupons from a Deal, click the **Delete** [Link](#) above the Coupon Code field.

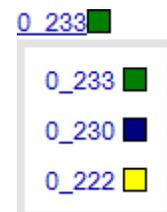
29. If necessary, select the Deal Group for the Deal. To change the Deal Group:

- 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.



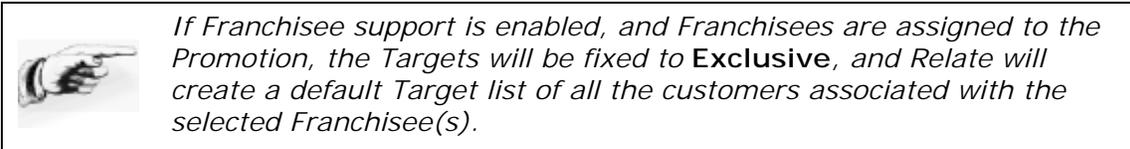
30. Click **next**.

The Define Targets step opens.

31. Define the Segment Target Eligibility Rules for the Promotion:

Figure 8-16: Define Targets Step

- a. Use the [Radio Buttons](#) to select the type of Targets.

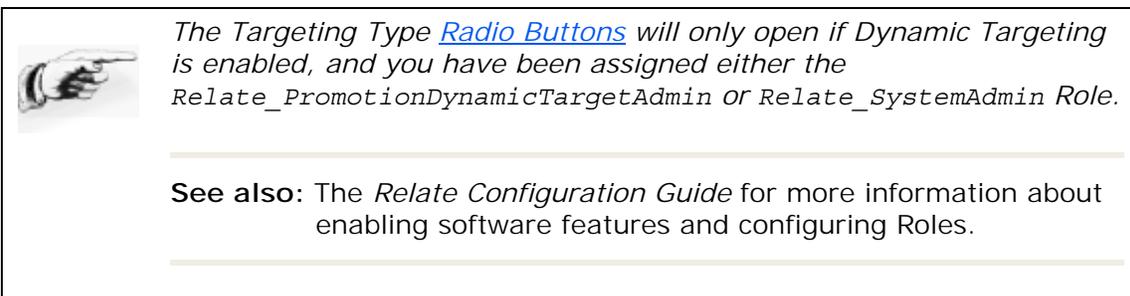


- **Untargeted** - **[DEFAULT]** The Promotion has no Segment Targets.
If you selected **Include Social Listening**, continue with [step 42 on page 284](#).
If you did not select **Include Social Listening**, continue with [step 48 on page 287](#).
 - **Exclusive** - The Promotion is only limited to 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.

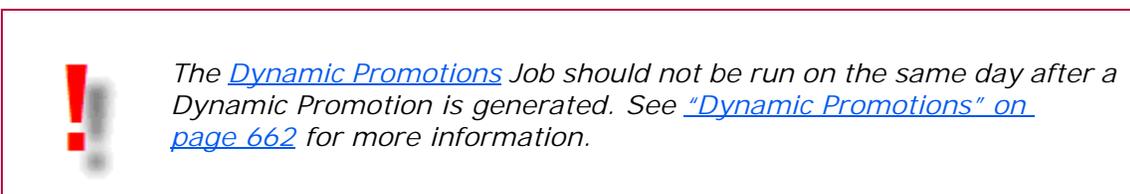
Targeting Type: Static Targeting Dynamic Targeting

Figure 8-17: Targeting Type

- Otherwise, continue with step e.



- 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.



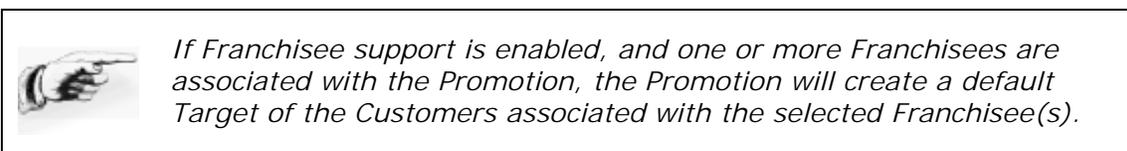
Dynamic Targeting Option [Radio Buttons](#) open.

Dynamic Targeting Option: Targets Added Only Targets Added and Removed

Figure 8-18: 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.](#)

32. 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 38 on page 281.](#)

33. Define the Target Filter for each Segment Target:

Target Name	Customer Count	Approx. Household Customer Count	Filter Type	Filtered Count
Birthday Target	9040	9030	None	9040
Combined Target	6659	6655	None	6659

Customer Household Consolidation:

Target Count Total 15699
Filtered Count Total 15699

Figure 8-19: 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.

Filter Type	Filtered Count
Top Sales	0
Random	0

Figure 8-20: Enter Filter Count

34. 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.

35. Click **next**.

The Split Targets step opens.

Target Name	Customer Count	Split Count	%	
Birthday Target	8000		100.00%	Split
Combined Target	5000		100.00%	Split

Figure 8-21: Split Targets Step

36. 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.).

Target Name	Customer Count	Split Count	%	
<i>Birthday Target</i>	8000		100.00%	Split
Birthday Target_1		2666	33.33	Delete
Birthday Target_2		2667	33.34	Delete
Birthday Target_3		2667	33.34	Delete
<i>Combined Target</i>	5000		100.00%	Split
Combined Target_1		2500	50.00	Delete
Combined Target_2		2500	50.00	Delete

Figure 8-22: 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.

Split Count	%
<i>(-67)</i>	<i>0.00%</i>
2666	33.33
2600	32.50
2667	33.34
<i>(+500)</i>	<i>100.00%</i>
3000	60.00
2500	50.00

Figure 8-23: Split Counts Incorrect

- d. If necessary, remove a Split by clicking the **Delete** [Link](#) for the Split.

37. Click **next**.

The Control Groups step opens.

38. Use the [Radio Buttons](#) to select the type of Control Groups:



Figure 8-24: 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 39 on page 282](#).
- ❑ **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

Control Groups			
<input type="radio"/> None <input checked="" type="radio"/> Promotion Level <input type="radio"/> Target Level			
Promotion Targets			
Target Name	Original Count	New Count	%
Birthday Target_1	2666	2666	20.51
Birthday Target_2	2667	2667	20.52
Birthday Target_3	2667	2667	20.52
Combined Target_1	3000	3000	23.08
Combined Target_2	2000	2000	15.38
Iskadjf;Iskfjas - Ctl	0	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	100%

Figure 8-25: 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.

Control Groups				
<input type="radio"/> None <input type="radio"/> Promotion Level <input checked="" type="radio"/> Target Level				
Promotion Targets		Control Groups		
Target Name	Original Count	New Count	Control Group Count	%
Birthday Target_1	2666	2666	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Birthday Target_2	2667	2667	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Birthday Target_3	2667	2667	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Combined Target_1	3000	3000	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Combined Target_2	2000	2000	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	0	

Figure 8-26: 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.

39. Click **next**.

The Export Channels step opens.

40. For each Split/Target, select the method used to contact the Customers in each Split/Target.

Export Channels				
Target Name	Mail	E-Mail	Phone	Channel Filter
LG New Customers_1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 8-27: 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.

The screenshot shows a form with two radio buttons: 'Location Channel' (selected) and 'Associate Channel'. To the right is a 'Filter' checkbox which is checked.

Figure 8-28: 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.

The screenshot shows a 'Filter' checkbox checked. Below it is a text input field labeled 'Max Count Per <Store>' with the value '136'. Below that is a dropdown menu labeled 'Method' with 'Random' selected.

Figure 8-29: 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.

The screenshot shows a 'Method' dropdown menu with 'Top - Numeric Attribute' selected. Below it is an 'Attribute' dropdown menu with '(Please select)' selected.

Figure 8-30: Numeric Attribute Filter

41. Click **next**.

- If **Include Social Listening** was selected, the Social Listening step opens. Continue with [step 42 on page 284](#).

- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with [step 46 on page 286](#).
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with [step 48 on page 287](#).

42. Define the keywords used by the Social Listening process:

Target Name	Social Network	Targeted Subscribers	Keyword(s) To Listen For	Copy Keywords
Target Customers	Facebook	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
Target Customers	Twitter	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
LG New Customers	Facebook	2387	Keyword(s): Add Remove	Copy To All Copy To Same Network Only

Figure 8-31: 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.
43. Click **next**.

The Social Listening Schedule step opens.

44. Configure the frequency at which the Job will check social media:

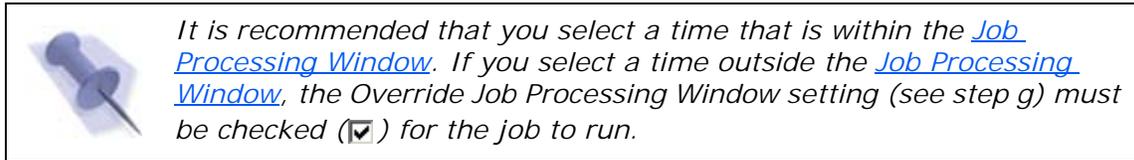


Figure 8-32: Social Listening Schedule Step

- 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.



- 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.

45. 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 48 on page 287](#).

46. Configure the Event Definition.

Figure 8-33: 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.

Event Documents	
Attach a document	
Document name	
Gettysburg_Address.doc	Remove

Figure 8-34: Event Documents List

The document is removed from the [List](#).

47. Click **next**.

The Budget step opens.

48. 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:

Coupon Codes	Define Targets	Budget	Options After Save
previous save cancel next			
Budget			
Promotion Costs			
Description	Budget Amount	Actual Amount	
	0.00	0.00	
Add			

Figure 8-35: Budget Step for an Untargeted Promotion

Budget

Promotion Costs

Description	Budget Amount	Actual Amount
	0.00	0.00

[Add](#)

Target Costs

Target Name	Channel	Qty	Budget			Actual		
			Fixed	CPM	Total	Fixed	CPM	Total
Birthday Target_1	Mail	2666			0.00			0.00
Birthday Target_2	Email	2067			0.00			0.00
Birthday Target_3	Phone	2667			0.00			0.00
Combined Target_1	Mail	2500			0.00			0.00
Combined Target_2	Phone	2000			0.00			0.00

Figure 8-36: Budget Step for a Targeted Promotion

- 1) Click the **Add** [List](#).

A new Promotion Cost line is added to the [List](#).

Promotion Costs

Description	Budget Amount	Actual Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
	0.00	0.00

[Delete](#)

[Add](#)

Figure 8-37: 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.

49. Click **next**.

The Options After Save step opens.

50. 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:

Options After Save

After saving this promotion, also perform the following actions:

- Generate**
Start a job to generate promotion target data.
- Approve**
Set this promotion's status to Approved.
- Export**
Start a job to create files for exporting this promotion to an external/POS system.

Dynamic Promotion Options
Set the export option for the Dynamic Promotion Job processing.

- Output Additions Only**
Only customers added to the event as a result of segment processing will be exported.
- Output All Updates**
All customers updated or added to the event as a result of segment processing will be exported.

Figure 8-38: 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.

51. Click **next**.

The Review step opens.

52. 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.

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.

The screenshot shows the 'New Promotion Wizard' interface. On the left is a sidebar menu with 'Promotion Type' selected. The main area has a breadcrumb trail: 'Promotion Type' > 'General Information' > 'Campaign' > 'Start / End Date' > 'Generic Attributes' > 'Associated Locations'. Below the breadcrumb is a 'Promotion Type' section with several radio button options: 'Coupon' (selected), 'Product', 'Coupon With Bounceback', 'Product With Bounceback', 'Message', 'Award', and 'Entitlement'. There is also a checkbox for 'Enable Serialized Coupon Management' next to the 'Coupon' option. At the bottom of the main area are navigation buttons: '<< previous save cancel next >>'.

Promotion

Promotion Type

General Information

Campaign

Start / End Date

Generic Attributes

Associated Locations

Define Targets

Budget

Options After Save

Review

Review

Promotion Type

General Information

Campaign

Start / End Date

Generic Attributes

Associated Locations

◀◀ previous save cancel next ▶▶

Promotion Type

Coupon Enable Serialized Coupon Management

Product

Coupon With Bounceback

Product With Bounceback

Message

Award

Entitlement

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.

- Configure the General Information for the Promotion:

Figure 9-2: General Information Step

- Enter the **Name** of the Promotion in the Name [Text Field](#).
- Enter a **Description** of the Promotion in the Description [Text Field](#).
- 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.*

- Click **next**.

The Campaign step opens.

- 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**.
- ❑ If Franchisee support is not enabled, the Generic Attributes step opens. Continue with step 12.
 - ❑ If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

10. Select the Franchisee(s) to associate with the Promotion.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	12781	anything	anything
<input type="checkbox"/>	14293	CATSRUS	
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers
<input type="checkbox"/>	1107	Dairy Queen - Chicago	Dairy Queen - Chicago
<input type="checkbox"/>	1106	Dairy Queen - Georgia2	Dairy Queen - Georgia
<input type="checkbox"/>	1112	Dairy Queen - Houston	Franchisee DQ - Houston TX
<input type="checkbox"/>	607	Dairy Queen - Marietta	Dairy Queen Marietta

Figure 9-7: Promotion Franchisees Step

11. Select **next**.

The Generic Attributes step opens.

12. Select or enter the configuration values for each of the **Required** Attributes.

Required	Optional
Back to School	ST LOC ATTRIBUTE
Back to School	st date
No	Add
	Add

Figure 9-8: Generic Attributes Step

13. Configure any necessary **Optional** Attribute(s):

- To Add an Attribute:
 - 1) Select the **Add** button for the Attribute.
A configuration field opens.
 - 2) Select or enter the configuration value for the Attribute.
- To delete an Attribute, select the **Delete** button for the Attribute.

The Attribute is deleted.

14. Select **next**.

The Associated Locations step opens.

15. Define the Location Eligibility Rules for the Promotion.

Figure 9-9: 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.

17. Add the Deal(s) for the Promotion:

Deal Id	Deal Name	Deal Type	Deal Code	Enabled
Delete Add				

Figure 9-10: Associate Deals Step

- e. Click the **Add** button.

A Deal [List Window](#) opens.

Deal Id	Deal Name	Deal Type
10595	Deal 725	Item Price Override
10594	BuyXGetY	Buy X Get Y
10593	test	Transaction Discount
10092	WSDL-Deal-11	Nth Item discount
10091	WSDL-Deal-10	Buy X Get Set
10088	WSDL-Deal-9	Item Price Override
10087	WSDL-Deal-7	Buy X Get Y
10086	WSDL-Deal-6	Buy X Get X
10085	Culinary Deal 2	Line Item Discount
10084	Culinary	Line Item Discount
9583	test	Tiered Discount
9582	SeaWorld-FreeRental	Transaction Discount
9581	SeaWorld-10% Merchandise Discount	Line Item Discount
9580	SeaWorld-Rides	Line Item Discount

Figure 9-11: 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 9-12: 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	<input type="text"/>	<input checked="" type="checkbox"/>

Figure 9-13: Deal Added

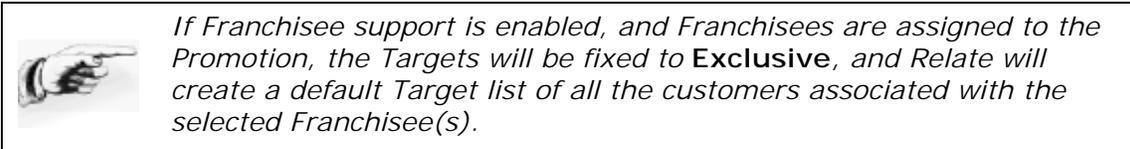
- i. If necessary, return to step e to add another Deal to the Promotion.
18. For each Deal in the Associated Deals [List](#) that will have a Deal Code assigned to it, enter that Code in the **Deal Code** [Text Field](#).
 19. For each Deal in the Associated Deals [List](#), use the **Enabled** [Check Box](#) to select whether the Deal will be active in the Promotion.
 20. Click **next**.
The Promo-Deal Attributes step opens.
 21. Configure the Promo-Deal Attributes for the Promotion event:

Figure 9-14: 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 22.
 - **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).
22. Click **next**.
The Define Targets step opens.
 23. Define the Segment Target Eligibility Rules for the Promotion:

Figure 9-15: Define Targets Step

- a. Use the [Radio Buttons](#) to select the type of Targets.

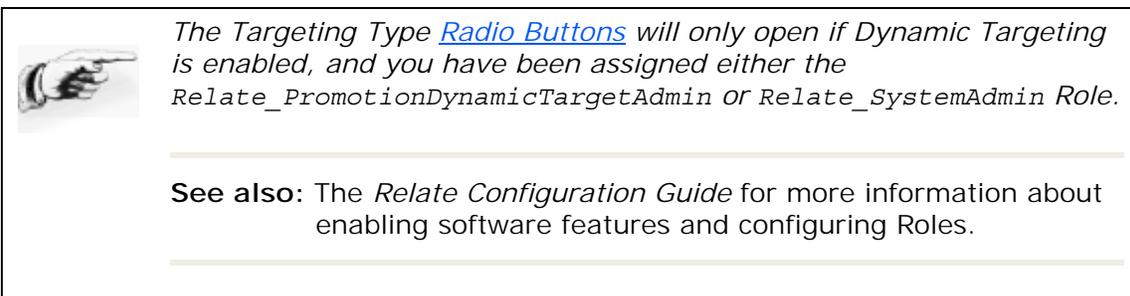


- **Untargeted** - [DEFAULT] The Promotion has no Segment Targets.
If you selected **Include Social Listening**, continue with [step 34 on page 305](#).
If you did not select **Include Social Listening**, continue with [step 40 on page 308](#).
 - **Exclusive** - The Promotion is only limited to Customers 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.

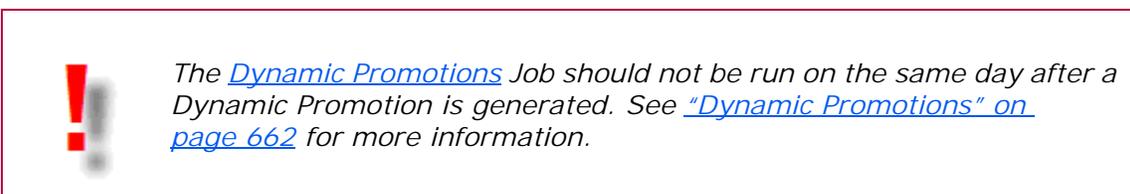
Targeting Type: Static Targeting Dynamic Targeting

Figure 9-16: Targeting Type

- Otherwise, continue with step e.



- 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.



Dynamic Targeting Option [Radio Buttons](#) open.

Dynamic Targeting Option: **Targets Added Only** **Targets Added and Removed**

Figure 9-17: 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.



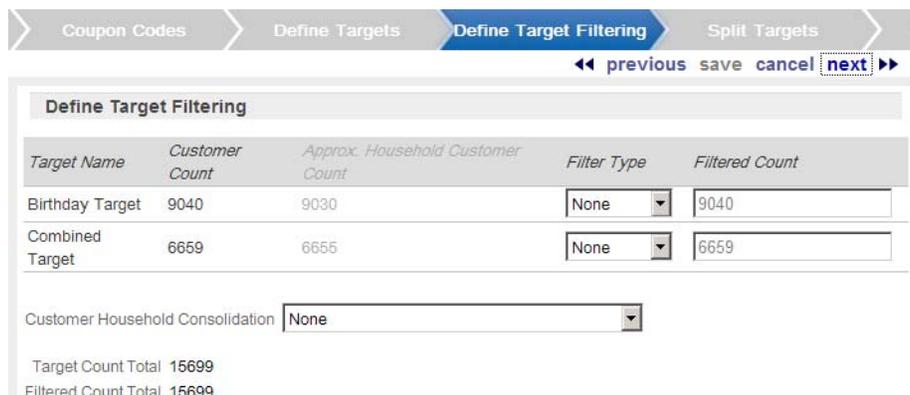
If Franchisee support is enabled, and one or more Franchisees are associated with the Promotion, the Promotion will create a default Target of the Customers associated with the selected Franchisee(s).

- 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.](#)

24. 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 30 on page 302.](#)

25. Define the Target Filter for each Segment Target:



Target Name	Customer Count	Approx. Household Customer Count	Filter Type	Filtered Count
Birthday Target	9040	9030	None	9040
Combined Target	6659	6655	None	6659

Customer Household Consolidation:

Target Count Total 15699
Filtered Count Total 15699

Figure 9-18: 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.

Filter Type	Filtered Count
Top Sales	0
Random	0

Figure 9-19: Enter Filter Count

26. 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.

27. Click **next**.

The Split Targets step opens.

Target Name	Customer Count	Split Count	%	
Birthday Target	8000		100.00%	Split
Combined Target	5000		100.00%	Split

Figure 9-20: Split Targets Step

28. 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.).

Target Name	Customer Count	Split Count	%	
<i>Birthday Target</i>	8000		100.00%	Split
Birthday Target_1		2666	33.33	Delete
Birthday Target_2		2667	33.34	Delete
Birthday Target_3		2667	33.34	Delete
<i>Combined Target</i>	6000		100.00%	Split
Combined Target_1		2500	50.00	Delete
Combined Target_2		2500	50.00	Delete

Figure 9-21: 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.

Split Count	%
<i>(-67)</i>	<i>0.00%</i>
2666	33.33
2600	32.50
2667	33.34
<i>(+500)</i>	<i>100.00%</i>
3000	60.00
2500	50.00

Figure 9-22: Split Counts Incorrect

- d. If necessary, remove a Split by clicking the **Delete** [Link](#) for the Split.

29. Click **next**.

The Control Groups step opens.

30. Use the [Radio Buttons](#) to select the type of Control Groups:

Figure 9-23: 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 31 on page 303](#).
- ❑ **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

Target Name	Original Count	New Count	%
Birthday Target_1	2666	2666	20.51
Birthday Target_2	2667	2667	20.52
Birthday Target_3	2667	2667	20.52
Combined Target_1	3000	3000	23.08
Combined Target_2	2000	2000	15.38
Iskadjf;Iskfjas - Ctl	0	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	100%

Figure 9-24: 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.

The screenshot shows a web interface titled "Control Groups". At the top, there are three radio buttons: "None", "Promotion Level", and "Target Level", with "Target Level" selected. Below this is a table with two main sections: "Promotion Targets" and "Control Groups".

Target Name	Original Count	New Count	Control Group Count	%
Birthday Target_1	2666	2666	0	0.00
Birthday Target_2	2667	2667	0	0.00
Birthday Target_3	2667	2667	0	0.00
Combined Target_1	3000	3000	0	0.00
Combined Target_2	2000	2000	0	0.00
Total	13000	13000	0	

Figure 9-25: 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.

31. Click **next**.

The Export Channels step opens.

32. For each Split/Target, select the method used to contact the Customers in each Split/Target.

The screenshot shows a navigation bar with steps: "Define Target Filtering", "Split Targets", "Control Groups", "Export Channels" (highlighted), "Budget", and "Options After Save". Below the navigation bar are navigation buttons: "previous", "save", "cancel", and "next".

The main content area is titled "Export Channels" and contains a table with columns: "Target Name", "Mail", "E-Mail", "Phone", and "Channel Filter".

Target Name	Mail	E-Mail	Phone	Channel Filter
LG New Customers_1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 9-26: 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.

The screenshot shows a form with two radio buttons: 'Location Channel' (selected) and 'Associate Channel'. To the right, there is a 'Filter' checkbox which is checked.

Figure 9-27: 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.

The screenshot shows the 'Filter' checkbox checked. Below it, there is a text input field labeled 'Max Count Per <Store>' with the value '136'. Below that is a dropdown menu labeled 'Method' with 'Random' selected.

Figure 9-28: 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.

The screenshot shows the 'Method' dropdown menu set to 'Top - Numeric Attribute'. Below it, the 'Attribute' dropdown menu is set to '(Please select)'.

Figure 9-29: Numeric Attribute Filter

33. Click next.

- If **Include Social Listening** was selected, the Social Listening step opens. Continue with [step 34 on page 305](#).

- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with [step 38 on page 307](#).
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with [step 40 on page 308](#).

34. Define the keywords used by the Social Listening process:

Target Name	Social Network	Targeted Subscribers	Keyword(s) To Listen For	Copy Keywords
Target Customers	Facebook	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
Target Customers	Twitter	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
LG New Customers	Facebook	2387	Keyword(s): Add Remove	Copy To All Copy To Same Network Only

Figure 9-30: 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.
35. Click **next**.

The Social Listening Schedule step opens.

36. Configure the frequency at which the Job will check social media:

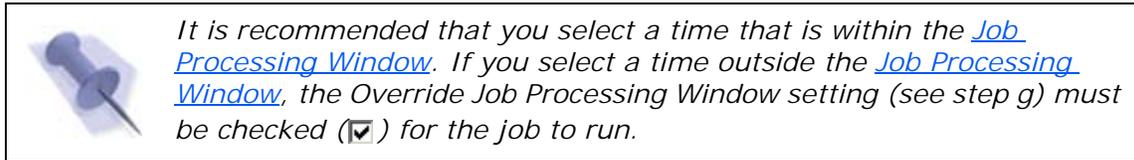


Figure 9-31: Social Listening Schedule Step

- 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.



- 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.

37. 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 40 on page 308](#).

38. Configure the Event Definition.



Figure 9-32: 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.

Event Documents	
Attach a document	
Document name	
Gettysburg_Address.doc	Remove

Figure 9-33: Event Documents List

The document is removed from the [List](#).

39. Click **next**.

The Budget step opens.

40. 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:

Coupon Codes	Define Targets	Budget	Options After Save
previous save cancel next			
Budget			
Promotion Costs			
Description	Budget Amount	Actual Amount	
	0.00	0.00	
Add			

Figure 9-34: Budget Step for an Untargeted Promotion

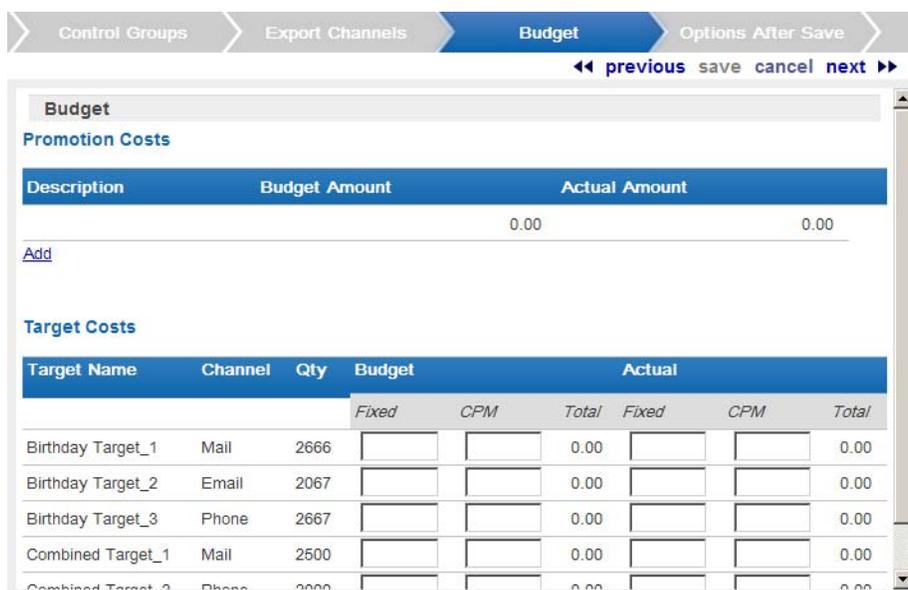


Figure 9-35: Budget Step for a Targeted Promotion

- 1) Click the **Add** [List](#).

A new Promotion Cost line is added to the [List](#).

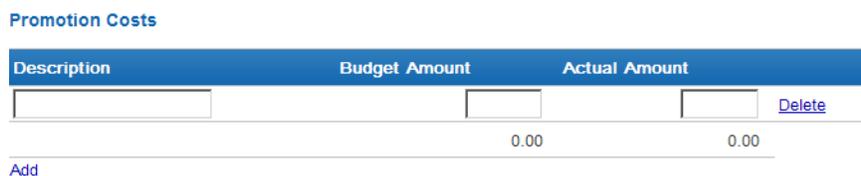


Figure 9-36: Promotion Costs

- 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.

41. Click **next**.

The Options After Save step opens.

42. 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:

Options After Save

After saving this promotion, also perform the following actions:

- Generate**
Start a job to generate promotion target data.
- Approve**
Set this promotion's status to Approved.
- Export**
Start a job to create files for exporting this promotion to an external/POS system.

Dynamic Promotion Options
Set the export option for the Dynamic Promotion Job processing.

- Output Additions Only**
Only customers added to the event as a result of segment processing will be exported.
- Output All Updates**
All customers updated or added to the event as a result of segment processing will be exported.

Figure 9-37: 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.

43. Click **next**.

The Review step opens.

44. 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.

Create a Coupon with Bounceback Promotion



*Promotion creation is NOT available in Relate if the Enable Promote Integration configuration is set to **True**.*

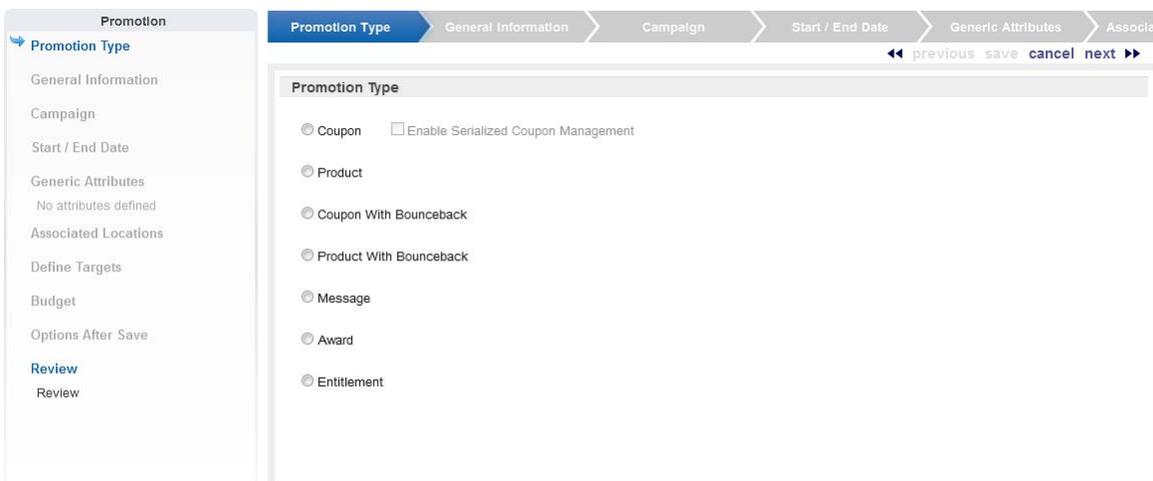
The Coupon with Bounceback Promotion created by Relate is not available in the base implementation of Xstore. Modifications must be made to Xstore to enable Bounceback Promotions. Your account manager or implementation consultant can provide additional detail.

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.



The screenshot shows the 'New Promotion Wizard' interface. On the left is a sidebar with a 'Promotion' header and a list of steps: Promotion Type (selected), General Information, Campaign, Start / End Date, Generic Attributes, Associated Locations, Define Targets, Budget, Options After Save, Review, and Review. The main content area is titled 'Promotion Type' and contains a list of radio button options: Coupon (selected), Product, Coupon With Bounceback, Product With Bounceback, Message, Award, and Entitlement. There is also an unchecked checkbox for 'Enable Serialized Coupon Management'. At the top of the main area, there are navigation buttons: 'previous', 'save', 'cancel', and 'next'.

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:



The screenshot shows the 'General Information' step of the wizard. The navigation bar at the top has 'General Information' selected. Below the navigation bar are three input fields: 'Name' (a text field), 'Description' (a larger text area), and 'Include Social Listening' (a checkbox). At the bottom of the main area, there are navigation buttons: 'previous', 'save', 'cancel', and 'next'.

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**.
- If Franchisee support is not enabled, the Generic Attributes step opens. Continue with step 12.
 - If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

10. Select the Franchisee(s) to associate with the Promotion.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	12781	anything	anything
<input type="checkbox"/>	14293	CATSRUS	
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers
<input type="checkbox"/>	1107	Dairy Queen - Chicago	Dairy Queen - Chicago
<input type="checkbox"/>	1106	Dairy Queen - Georgia2	Dairy Queen - Georgia
<input type="checkbox"/>	1112	Dairy Queen - Houston	Franchisee DQ - Houston TX
<input type="checkbox"/>	607	Dairy Queen - Marietta	Dairy Queen Marietta

Figure 10-7: Promotion Franchisees Step

11. Select **next**.

The Generic Attributes step opens.

12. Select or enter the configuration values for each of the **Required** Attributes.

Figure 10-8: Generic Attributes Step

13. Configure any necessary **Optional** Attribute(s):

- To Add an Attribute:
 - 1) Select the **Add** button for the Attribute.
A configuration field opens.
 - 2) Select or enter the configuration value for the Attribute.
- To delete an Attribute, select the **Delete** button for the Attribute.
The Attribute is deleted.

14. Select **next**.

The Associated Locations step opens.

15. Define the Location Eligibility Rules for the Promotion.

Figure 10-9: 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.

17. If necessary, create a default Bounceback Coupon.

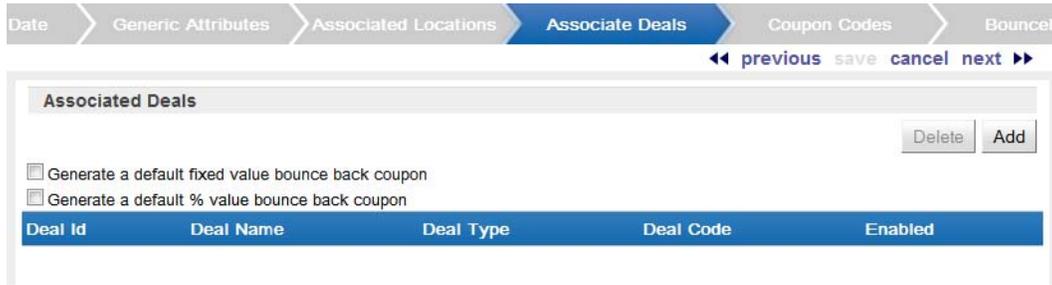


Figure 10-10: Associate Deals - Bounceback Coupon

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.

18. Add the Deal(s) for the Promotion:

a. Click the **Add** button.

A Deal [List Window](#) opens.

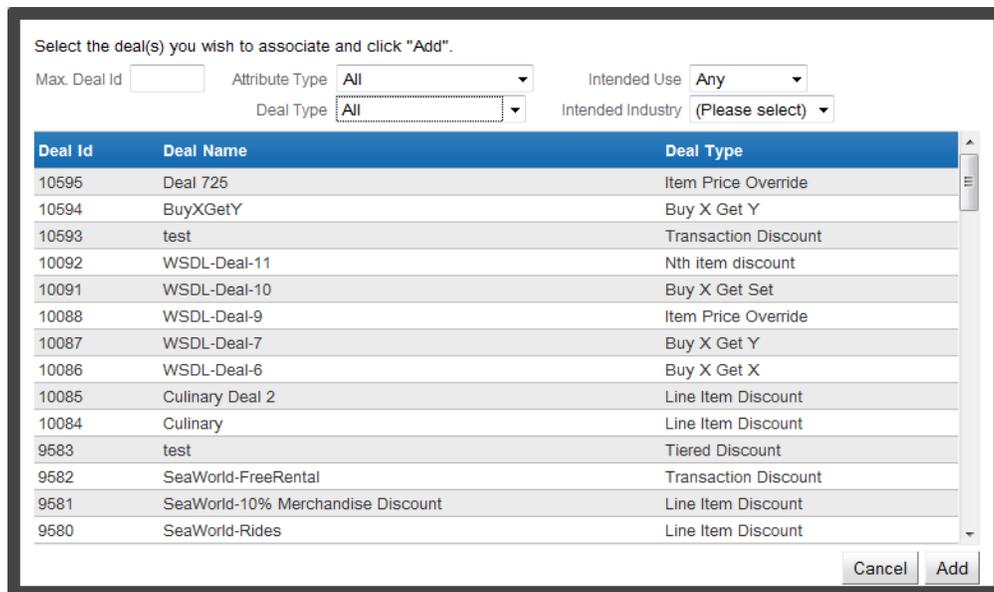


Figure 10-11: Deal List Window

b. 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.*

Attribute Type Attribute Type

Figure 10-12: 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**.
- c. Click a Deal to select it. You can select multiple Deals.
 - d. 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	<input type="text"/>	<input checked="" type="checkbox"/>

Figure 10-13: Deal Added

- e. If necessary, return to step a 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 17).

19. 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](#).
20. For each Deal in the Associated Deals [List](#), use the **Enabled** [Check Box](#) to select whether the Deal will be active in the Promotion.
21. Click **next**.

The Promo-Deal Attributes step opens.

22. Configure the Deal Attributes for the Promotion event:

Figure 10-14: 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 23.
 - Unchecked** () - Attributes will be used. The available attributes are displayed. Continue with the next step.
 - b. Configure the Attribute(s) for the Deal(s).
23. Click **next**.
- The Coupon Codes step opens.
24. For each Deal, define the Coupon Code to associate with the Deal:

Deal Id	Deal Name	Deal Type	Deal Group	Coupon Codes
260	0907_51	Line Item Discount	0_260	Coupon Code <input type="text"/> Get next coupon id Media Description <input type="text"/> Estimated Distribution <input type="text"/> Add

Figure 10-15: 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.

25. For each Deal, enter a **Media Description** for the Deal's Coupons.
26. Enter the **Estimated Distribution** for each of the Coupons in the Promotion.
27. To add a new set of Coupons to the Deal, click the **Add Link**, then repeat steps 24-25 for the new Coupon.
28. To delete an unneeded set of Coupons from a Deal, click the **Delete Link** above the Coupon Code field.
29. 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.
30. Click **next**.
The Bouncebacks step opens.
31. Indicate which Deal(s) will be the Bounceback Deal(s).

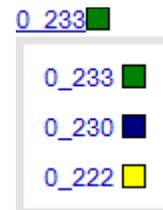


Figure 10-16: Bouncebacks Step

 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 10-17: 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 10-18: Default Bounceback Coupon

32. 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 10-19: 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 10-20: 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 10-21: 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.

33. Click **next**.

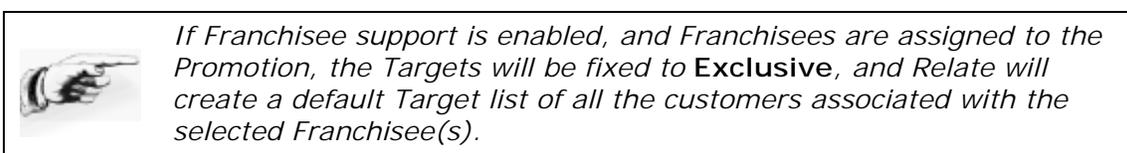
The Define Targets step opens.

34. Define the Segment Target Eligibility Rules for the Promotion:



Figure 10-22: 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 331](#).
If you did not select **Include Social Listening**, continue with [step 51 on page 334](#).
- 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.

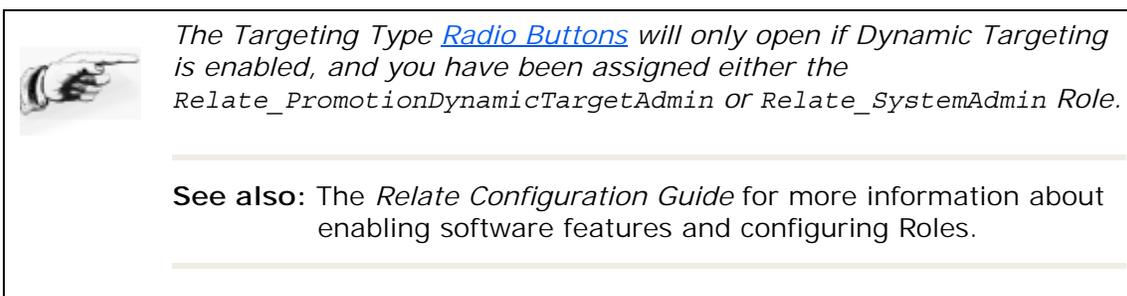
b. The next step you perform depends upon the configuration of both your system and your User account:

- If the **Targeting Type** [Radio Buttons](#) open, continue with step c.

Targeting Type: **Static Targeting** **Dynamic Targeting**

Figure 10-23: Targeting Type

- Otherwise, continue with step e.



- 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 662](#) for more information.

Dynamic Targeting Option [Radio Buttons](#) open.

Dynamic Targeting Option: **Targets Added Only** **Targets Added and Removed**

Figure 10-24: 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.



If Franchisee support is enabled, and one or more Franchisees are associated with the Promotion, the Promotion will create a default Target of the Customers associated with the selected Franchisee(s).

- 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](#).

35. 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 41 on page 328](#).

36. Define the Target Filter for each Segment Target:

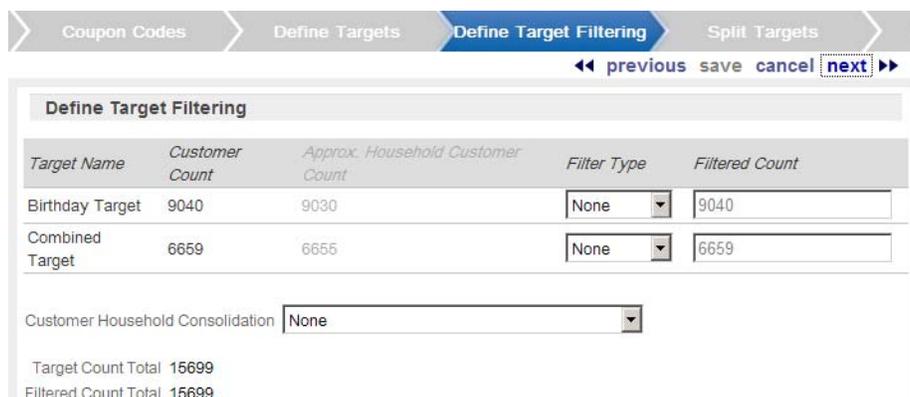


Figure 10-25: Define Target Filtering Step

- 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.

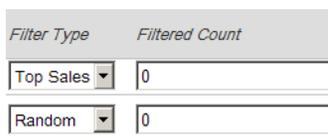


Figure 10-26: Enter Filter Count

37. 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.

38. Click **next**.

The Split Targets step opens.



Figure 10-27: Split Targets Step

39. 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.).

Target Name	Customer Count	Split Count	%	
Birthday Target	8000		100.00%	Split
Birthday Target_1		2666	33.33	Delete
Birthday Target_2		2667	33.34	Delete
Birthday Target_3		2667	33.34	Delete
Combined Target	5000		100.00%	Split
Combined Target_1		2500	50.00	Delete
Combined Target_2		2500	50.00	Delete

Figure 10-28: 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.

Split Count	%
(-67)	0.00%
2666	33.33
2600	32.50
2667	33.34
(+500)	100.00%
3000	60.00
2500	50.00

Figure 10-29: Split Counts Incorrect

- d. If necessary, remove a Split by clicking the **Delete** [Link](#) for the Split.
40. Click **next**.

The Control Groups step opens.

41. Use the [Radio Buttons](#) to select the type of Control Groups:



Figure 10-30: 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 42 on page 329](#).
- Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

Control Groups			
<input type="radio"/> None <input checked="" type="radio"/> Promotion Level <input type="radio"/> Target Level			
Promotion Targets			
Target Name	Original Count	New Count	%
Birthday Target_1	2666	2666	20.51
Birthday Target_2	2667	2667	20.52
Birthday Target_3	2667	2667	20.52
Combined Target_1	3000	3000	23.08
Combined Target_2	2000	2000	15.38
Iskadjf;lskfjas - Ctl	0	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	100%

Figure 10-31: 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.

The screenshot shows a web interface titled "Control Groups". At the top, there are three radio buttons: "None", "Promotion Level", and "Target Level", with "Target Level" selected. Below this is a table with two main sections: "Promotion Targets" and "Control Groups".

Target Name	Original Count	New Count	Control Group Count	%
Birthday Target_1	2666	2666	0	0.00
Birthday Target_2	2667	2667	0	0.00
Birthday Target_3	2667	2667	0	0.00
Combined Target_1	3000	3000	0	0.00
Combined Target_2	2000	2000	0	0.00
Total	13000	13000	0	

Figure 10-32: 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.

42. Click **next**.

The Export Channels step opens.

43. For each Split/Target, select the method used to contact the Customers in each Split/Target.

The screenshot shows a navigation bar with steps: "Define Target Filtering", "Split Targets", "Control Groups", "Export Channels" (highlighted), "Budget", and "Options After Save". Below the navigation bar is a table titled "Export Channels".

Target Name	Mail	E-Mail	Phone	Channel Filter
LG New Customers_1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 10-33: 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.



The screenshot shows a form with two radio buttons: "Location Channel" (selected) and "Associate Channel" (unselected). To the right of these is a "Filter" checkbox, which is checked.

Figure 10-34: Channel Filter Options

Channel Filters have the following options:

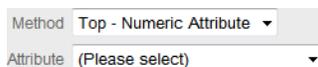
- [Radio Buttons](#) that determine the type of Channel.
 - Location Channel** - Customers are contacted by the Location.
 - Associate Channel** - Customers are contacted by their Assigned Associates.
- **Filter** - This [Check Box](#) determines whether the export channel is filtered. If this [Check Box](#) has a checkmark () , additional Channel Filter options are displayed.



The screenshot shows a form with a "Filter" checkbox checked. Below it are two fields: "Max Count Per <Store>" with a text input containing "136", and "Method" with a dropdown menu set to "Random".

Figure 10-35: 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.



The screenshot shows a form with a "Method" dropdown menu set to "Top - Numeric Attribute". Below it is an "Attribute" dropdown menu set to "(Please select)".

Figure 10-36: Numeric Attribute Filter

44. Click **next**.

- If **Include Social Listening** was selected, the Social Listening step opens. Continue with [step 45 on page 331](#).

- ❑ 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 333](#).
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with [step 51 on page 334](#).

45. Define the keywords used by the Social Listening process:

Target Name	Social Network	Targeted Subscribers	Keyword(s) To Listen For	Copy Keywords
Target Customers	Facebook	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
Target Customers	Twitter	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
LG New Customers	Facebook	2387	Keyword(s): Add Remove	Copy To All Copy To Same Network Only

Figure 10-37: 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:

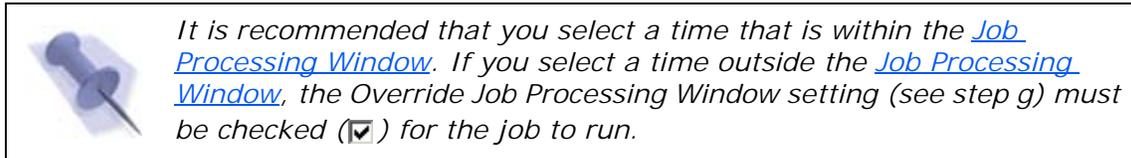


Figure 10-38: Social Listening Schedule Step

- 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.



- 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 334](#).

49. Configure the Event Definition.



Figure 10-39: 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.



Event Documents	
Attach a document	
Document name	
Gettysburg_Address.doc	Remove

Figure 10-40: Event Documents List

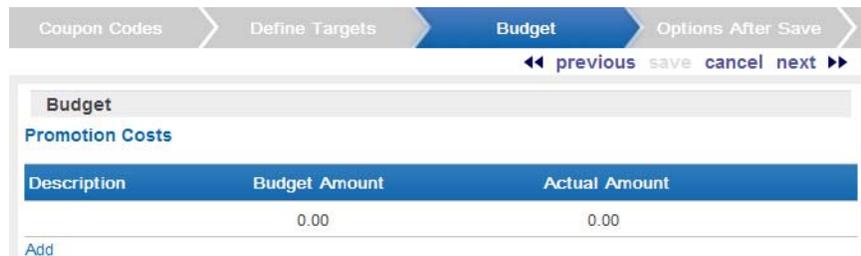
The document is removed from the [List](#).

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:



Coupon Codes > Define Targets > Budget > Options After Save			
◀ previous save cancel next ▶			
Budget			
Promotion Costs			
Description	Budget Amount	Actual Amount	
	0.00	0.00	
Add			

Figure 10-41: Budget Step for an Untargeted Promotion

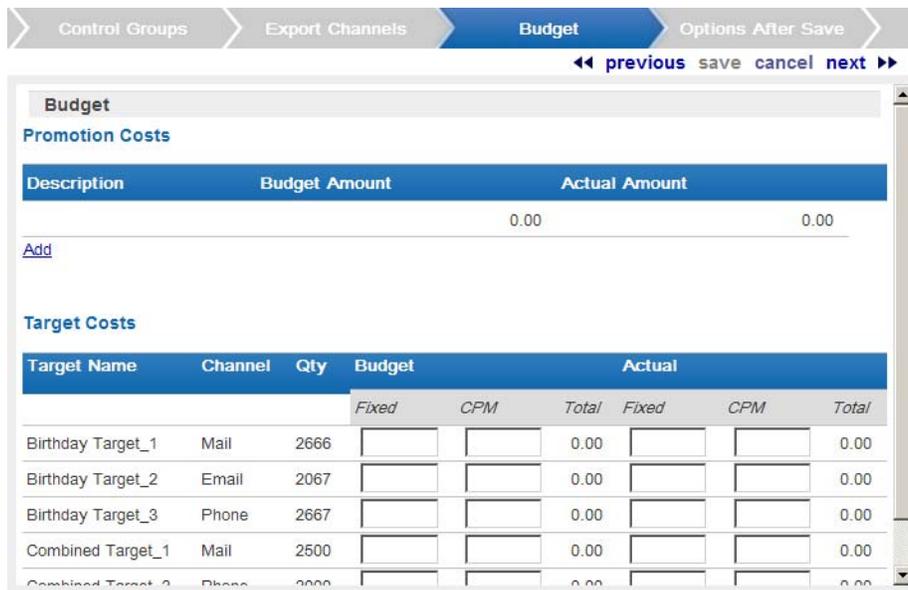


Figure 10-42: Budget Step for a Targeted Promotion

- 1) Click the **Add** [List](#).

A new Promotion Cost line is added to the [List](#).

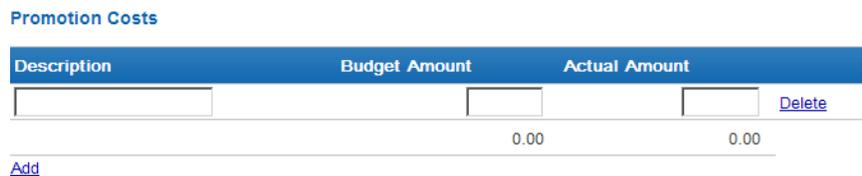


Figure 10-43: Promotion Costs

- 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:

Export Channels Budget Options After Save Review

◀◀ previous save cancel next ▶▶

Options After Save

After saving this promotion, also perform the following actions:

- Generate**
Start a job to generate promotion target data.
- Approve**
Set this promotion's status to Approved.
- Export**
Start a job to create files for exporting this promotion to an external/POS system.

Dynamic Promotion Options
Set the export option for the Dynamic Promotion Job processing.

- Output Additions Only**
Only customers added to the event as a result of segment processing will be exported.
- Output All Updates**
All customers updated or added to the event as a result of segment processing will be exported.

Figure 10-44: 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.

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.

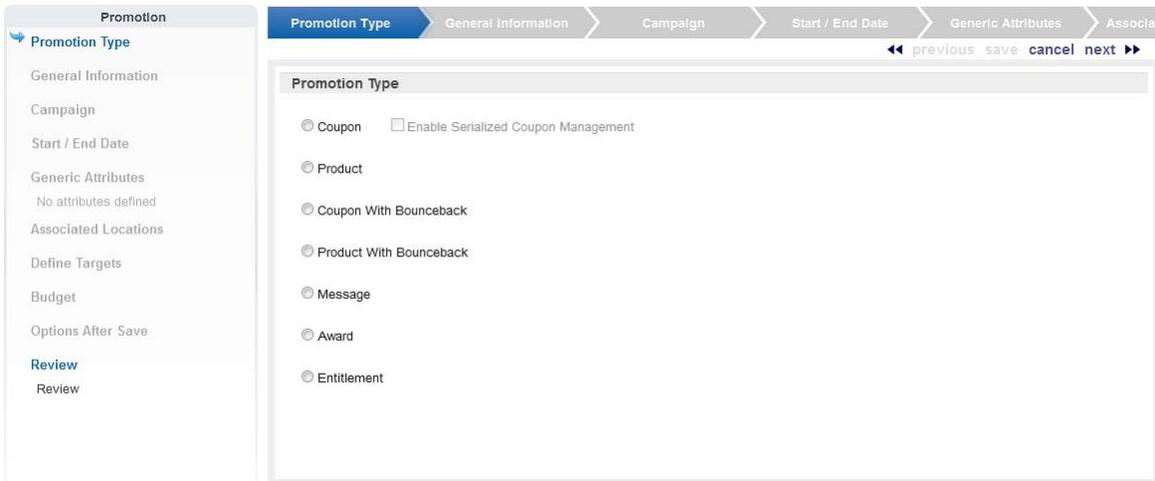


Figure 11-1: New Promotion Wizard

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**.
- If Franchisee support is not enabled, the Generic Attributes step opens. Continue with step 12.
 - If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

10. Select the Franchisee(s) to associate with the Promotion.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	12781	anything	anything
<input type="checkbox"/>	14293	CATSRUS	
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers
<input type="checkbox"/>	1107	Dairy Queen - Chicago	Dairy Queen - Chicago
<input type="checkbox"/>	1106	Dairy Queen - Georgia2	Dairy Queen - Georgia
<input type="checkbox"/>	1112	Dairy Queen - Houston	Franchisee DQ - Houston TX
<input type="checkbox"/>	607	Dairy Queen - Marietta	Dairy Queen Marietta

Figure 11-7: Promotion Franchisees Step

11. Select **next**.

The Generic Attributes step opens.

12. Select or enter the configuration values for each of the **Required** Attributes.

Figure 11-8: Generic Attributes Step

13. Configure any necessary **Optional** Attribute(s):

- To Add an Attribute:
 - 1) Select the **Add** button for the Attribute.
A configuration field opens.
 - 2) Select or enter the configuration value for the Attribute.
- To delete an Attribute, select the **Delete** button for the Attribute.
The Attribute is deleted.

14. Select **next**.

The Associated Locations step opens.

15. Define the Location Eligibility Rules for the Promotion.

Figure 11-9: 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.

17. If necessary, create a default Bounceback Coupon.

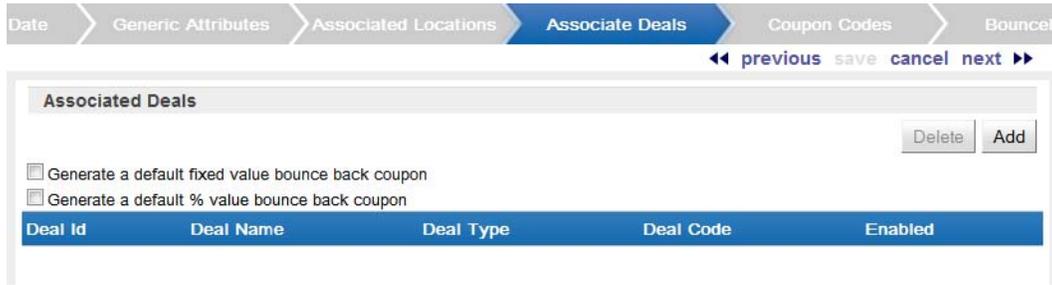


Figure 11-10: Associate Deals - Bounceback Coupon

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.

18. Add the Deal(s) for the Promotion:

a. Click the **Add** button.

A Deal [List Window](#) opens.

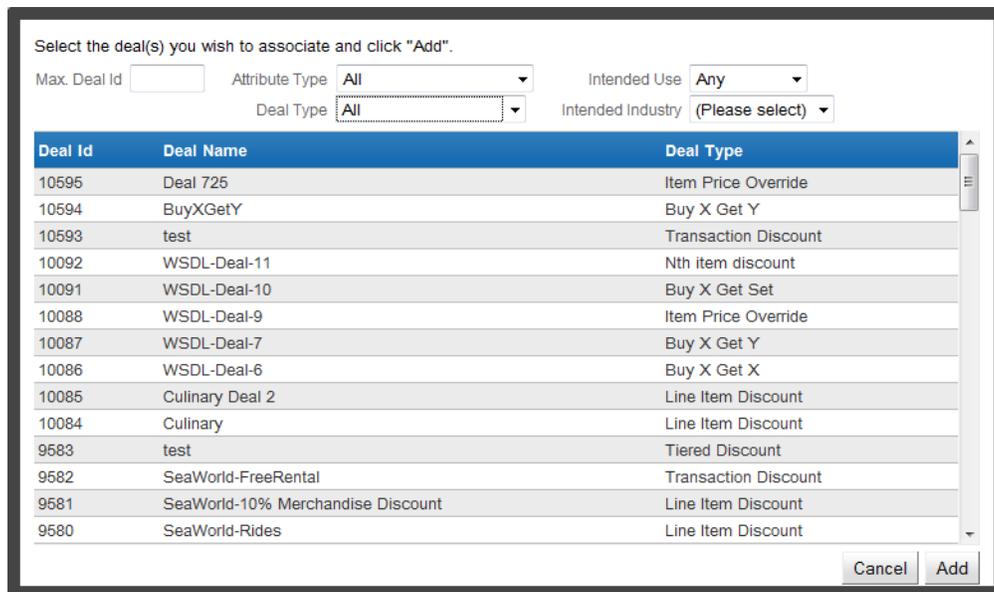


Figure 11-11: Deal List Window

b. 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.*

Attribute Type Attribute Type

Figure 11-12: 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**.
- c. Click a Deal to select it. You can select multiple Deals.
 - d. 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	<input type="text"/>	<input checked="" type="checkbox"/>

Figure 11-13: Deal Added

- e. If necessary, return to step a 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 17).

19. 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](#).
20. For each Deal in the Associated Deals [List](#), use the **Enabled** [Check Box](#) to select whether the Deal will be active in the Promotion.
21. Click **next**.

The Promo-Deal Attributes step opens.

22. Configure the Deal Attributes for the Promotion event:

Figure 11-14: 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 23.
 - Unchecked** () - Attributes will be used. The available attributes are displayed. Continue with the next step.
 - b. Configure the Attribute(s) for the Deal(s).
23. Click **next**.
- The Bouncebacks step opens.
24. Indicate which Deal(s) will be the Bounceback Deal(s).

Deal Id	Deal Name	Deal Type	Award	Coupon Definition	Valid Period	Coupon Text
38	test	Line Item Discount	<input type="checkbox"/>			
35	TestImportDeal1	Line Item Discount	<input type="checkbox"/>			

Figure 11-15: 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.

Deal Id	Deal Name	Deal Type	Award	Coupon Definition	Valid Period	Coupon Text
38	test	Line Item Discount	<input checked="" type="checkbox"/>	Discount Type: <input checked="" type="radio"/> Amount <input type="radio"/> Percent Value Off: <input type="text"/> Prefix: <input type="text"/> Get next coupon id	Redemption Type: <input checked="" type="radio"/> Fixed <input type="radio"/> Relative Start Date: 2012-03-30 End Date: 2012-03-30 Redemption Deal ID: (Please select)	<input type="text"/>

Figure 11-16: 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.

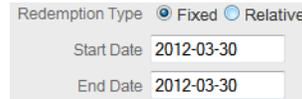
999998	Fixed value off	Trigger Only Bounceback	<input checked="" type="checkbox"/>	Discount Type: <input checked="" type="radio"/> Amount <input type="radio"/> Percent Value Off: <input type="text"/> Prefix: <input type="text"/> Get next coupon id	Redemption Type: <input checked="" type="radio"/> Fixed <input type="radio"/> Relative Start Date: 2012-03-30 End Date: 2012-03-30 Redemption Deal ID: (Please select)	<input type="text"/>
--------	-----------------	-------------------------	-------------------------------------	---	---	----------------------

Figure 11-17: Default Bounceback Coupon

25. 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:



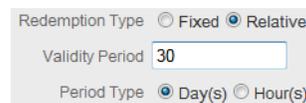
The screenshot shows a form for configuring a Fixed Redemption Type. At the top, there are two radio buttons: 'Fixed' (which is selected) and 'Relative'. Below this, there are two input fields: 'Start Date' with the value '2012-03-30' and 'End Date' with the value '2012-03-30'.

Figure 11-18: 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:



The screenshot shows a form for configuring a Relative Redemption Type. At the top, there are two radio buttons: 'Fixed' and 'Relative' (which is selected). Below this, there is an input field for 'Validity Period' with the value '30'. At the bottom, there are two radio buttons for 'Period Type': 'Day(s)' (which is selected) and 'Hour(s)'.

Figure 11-19: 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.

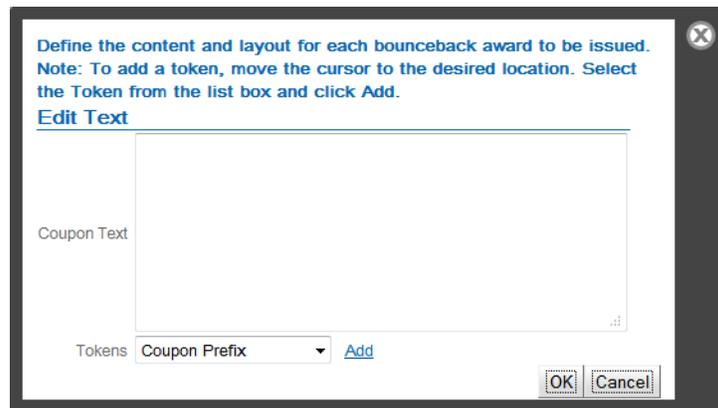


Figure 11-20: Edit Text Window

- 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.

26. Click **next**.

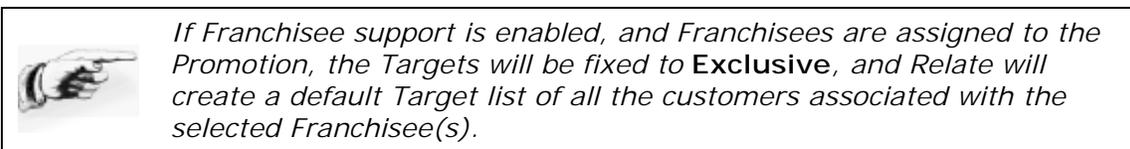
The Define Targets step opens.

27. Define the Segment Target Eligibility Rules for the Promotion:



Figure 11-21: 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 38 on page 357](#).
If you did not select **Include Social Listening**, continue with [step 44 on page 360](#).
- **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.

Targeting Type: Static Targeting Dynamic Targeting

Figure 11-22: 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 662](#) for more information.

Dynamic Targeting Option [Radio Buttons](#) open.

Dynamic Targeting Option: Targets Added Only Targets Added and Removed

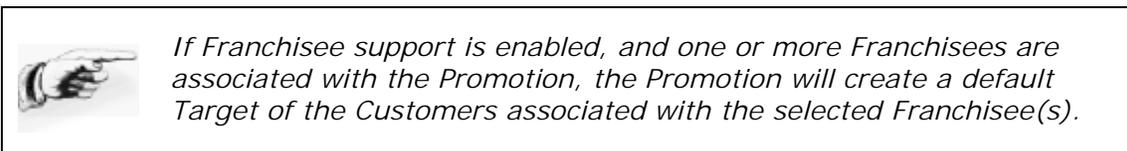
Figure 11-23: Dynamic Targeting Option

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.

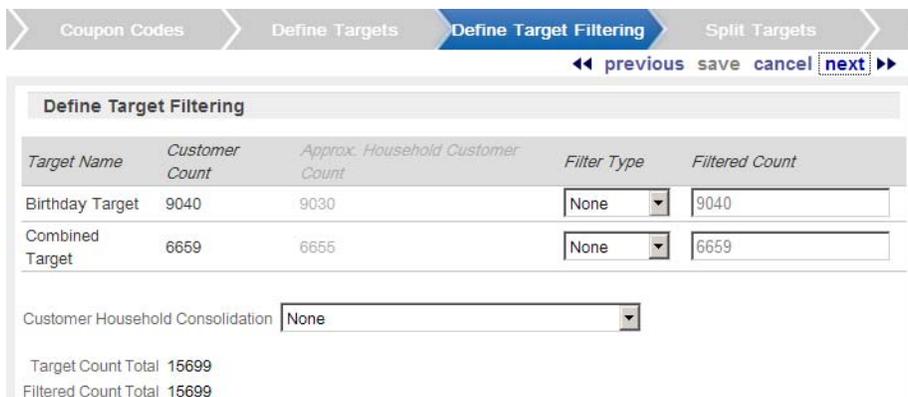


- For instructions on configuring Segment Eligibility Rules, see [“Define Segment Eligibility” on page 52.](#)
- For more information about Segment Eligibility Rules, see [“Segment/Target Eligibility” on page 51.](#)

28. 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 34 on page 354.](#)

29. Define the Target Filter for each Segment Target:



Target Name	Customer Count	Approx. Household Customer Count	Filter Type	Filtered Count
Birthday Target	9040	9030	None	9040
Combined Target	6659	6655	None	6659

Customer Household Consolidation: None

Target Count Total 15699
Filtered Count Total 15699

Figure 11-24: 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.

Filter Type	Filtered Count
Top Sales	0
Random	0

Figure 11-25: Enter Filter Count

- 30. 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.

- 31. Click **next**.

The Split Targets step opens.

Define Targets
Define Target Filtering
Split Targets
Control Groups
Exit

◀ previous
 save
 cancel
next
 ▶

Split Targets

Target Name	Customer Count	Split Count	%	
Birthday Target	8000		100.00%	Split
Combined Target	5000		100.00%	Split

Figure 11-26: Split Targets Step

- 32. 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.).

Target Name	Customer Count	Split Count	%	
<i>Birthday Target</i>	8000		100.00%	Split
Birthday Target_1		2666	33.33	Delete
Birthday Target_2		2667	33.34	Delete
Birthday Target_3		2667	33.34	Delete
<i>Combined Target</i>	6000		100.00%	Split
Combined Target_1		2500	50.00	Delete
Combined Target_2		2500	50.00	Delete

Figure 11-27: 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.

Split Count	%
<i>(-67)</i>	<i>0.00%</i>
2666	33.33
2600	32.50
2667	33.34
<i>(+500)</i>	<i>100.00%</i>
3000	60.00
2500	50.00

Figure 11-28: Split Counts Incorrect

- d. If necessary, remove a Split by clicking the **Delete** [Link](#) for the Split.

33. Click next.

The Control Groups step opens.

34. Use the [Radio Buttons](#) to select the type of Control Groups:



Figure 11-29: 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 35 on page 355](#).
- ❑ **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

Control Groups			
<input type="radio"/> None <input checked="" type="radio"/> Promotion Level <input type="radio"/> Target Level			
Promotion Targets			
Target Name	Original Count	New Count	%
Birthday Target_1	2666	2666	20.51
Birthday Target_2	2667	2667	20.52
Birthday Target_3	2667	2667	20.52
Combined Target_1	3000	3000	23.08
Combined Target_2	2000	2000	15.38
Iskadjf;Iskfjas - Ctl	0	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	100%

Figure 11-30: 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.

The screenshot shows a web interface titled "Control Groups". At the top, there are three radio buttons: "None", "Promotion Level", and "Target Level", with "Target Level" selected. Below this is a table with two main sections: "Promotion Targets" and "Control Groups".

Target Name	Original Count	New Count	Control Group Count	%
Birthday Target_1	2666	2666	0	0.00
Birthday Target_2	2667	2667	0	0.00
Birthday Target_3	2667	2667	0	0.00
Combined Target_1	3000	3000	0	0.00
Combined Target_2	2000	2000	0	0.00
Total	13000	13000	0	

Figure 11-31: 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.

35. Click **next**.

The Export Channels step opens.

36. For each Split/Target, select the method used to contact the Customers in each Split/Target.

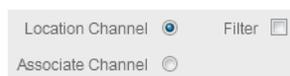
The screenshot shows a navigation bar with steps: "Define Target Filtering", "Split Targets", "Control Groups", "Export Channels" (highlighted), "Budget", and "Options After Save". Below the navigation bar is a table titled "Export Channels".

Target Name	Mail	E-Mail	Phone	Channel Filter
LG New Customers_1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 11-32: 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.

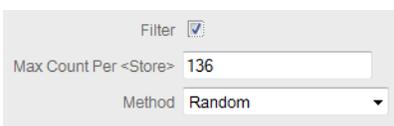


The screenshot shows a form with three options: 'Location Channel' with a selected radio button, 'Associate Channel' with an unselected radio button, and 'Filter' with a checked checkbox.

Figure 11-33: Channel Filter Options

Channel Filters have the following options:

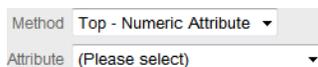
- [Radio Buttons](#) that determine the type of Channel.
 - Location Channel** - Customers are contacted by the Location.
 - Associate Channel** - Customers are contacted by their Assigned Associates.
- **Filter** - This [Check Box](#) determines whether the export channel is filtered. If this [Check Box](#) has a checkmark () , additional Channel Filter options are displayed.



The screenshot shows the 'Filter' checkbox checked. Below it, there is a text input field labeled 'Max Count Per <Store>' with the value '136' and a dropdown menu labeled 'Method' with 'Random' selected.

Figure 11-34: 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.



The screenshot shows the 'Method' dropdown menu set to 'Top - Numeric Attribute' and the 'Attribute' dropdown menu set to '(Please select)'.

Figure 11-35: Numeric Attribute Filter

37. Click **next**.

- If **Include Social Listening** was selected, the Social Listening step opens. Continue with [step 38 on page 357](#).

- ❑ If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with [step 42 on page 359](#).
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with [step 44 on page 360](#).

38. Define the keywords used by the Social Listening process:

Target Name	Social Network	Targeted Subscribers	Keyword(s) To Listen For	Copy Keywords
Target Customers	Facebook	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
Target Customers	Twitter	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
LG New Customers	Facebook	2387	Keyword(s): Add Remove	Copy To All Copy To Same Network Only

Figure 11-36: 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.
39. Click **next**.

The Social Listening Schedule step opens.

40. Configure the frequency at which the Job will check social media:

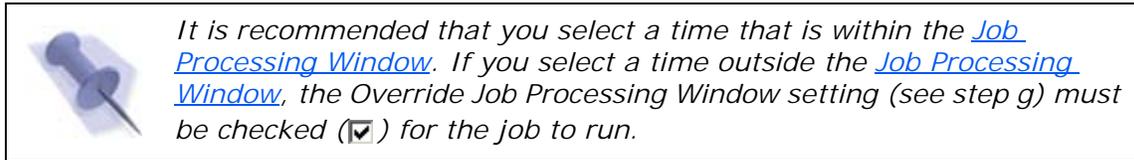


Figure 11-37: Social Listening Schedule Step

- 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.



- 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.

41. 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 44 on page 360](#).

42. Configure the Event Definition.

Figure 11-38: 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.

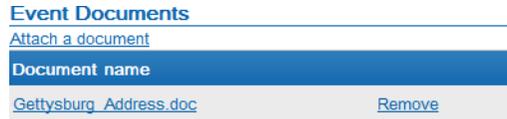


Figure 11-39: Event Documents List

The document is removed from the [List](#).

43. Click **next**.

The Budget step opens.

44. 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:

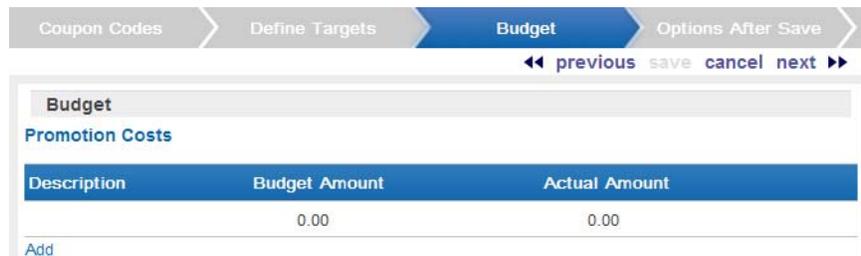


Figure 11-40: Budget Step for an Untargeted Promotion

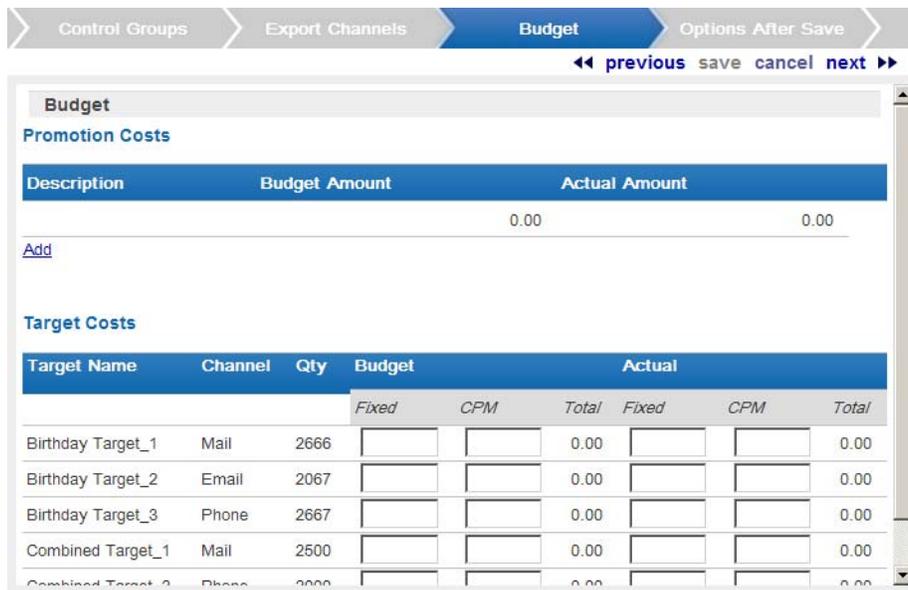


Figure 11-41: Budget Step for a Targeted Promotion

- 1) Click the **Add** [List](#).

A new Promotion Cost line is added to the [List](#).

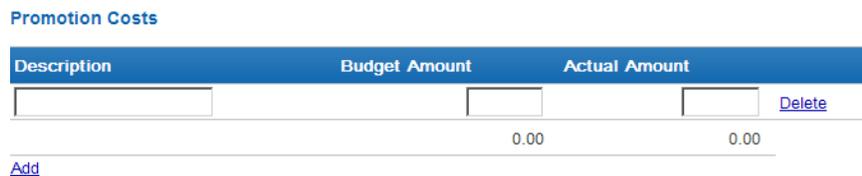


Figure 11-42: Promotion Costs

- 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.

45. Click **next**.

The Options After Save step opens.

46. 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:

Export Channels Budget Options After Save Review

◀◀ previous save cancel next ▶▶

Options After Save

After saving this promotion, also perform the following actions:

- Generate**
Start a job to generate promotion target data.
- Approve**
Set this promotion's status to Approved.
- Export**
Start a job to create files for exporting this promotion to an external/POS system.

Dynamic Promotion Options
Set the export option for the Dynamic Promotion Job processing.

- Output Additions Only**
Only customers added to the event as a result of segment processing will be exported.
- Output All Updates**
All customers updated or added to the event as a result of segment processing will be exported.

Figure 11-43: 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.

47. Click **next**.

The Review step opens.

48. 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.

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.

- Configure the General Information for the Promotion:

Figure 12-2: General Information Step

- Enter the **Name** of the Promotion in the Name [Text Field](#).
- Enter a **Description** of the Promotion in the Description [Text Field](#).
- 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.*

- Click **next**.

The Campaign step opens.

- 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**.
- If Franchisee support is not enabled, the Generic Attributes step opens. Continue with step 12.
 - If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

10. Select the Franchisee(s) to associate with the Promotion.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	12781	anything	anything
<input type="checkbox"/>	14293	CATSRUS	
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers
<input type="checkbox"/>	1107	Dairy Queen - Chicago	Dairy Queen - Chicago
<input type="checkbox"/>	1106	Dairy Queen - Georgia2	Dairy Queen - Georgia
<input type="checkbox"/>	1112	Dairy Queen - Houston	Franchisee DQ - Houston TX
<input type="checkbox"/>	607	Dairy Queen - Marietta	Dairy Queen Marietta

Figure 12-7: Promotion Franchisees Step

11. Select **next**.

The Generic Attributes step opens.

12. Select or enter the configuration values for each of the **Required** Attributes.

Required	Optional
Back to School	ST LOC ATTRIBUTE
Back to School	st date
No	Add
	Add

Figure 12-8: Generic Attributes Step

13. Configure any necessary **Optional** Attribute(s):

- To Add an Attribute:
 - 1) Select the **Add** button for the Attribute.
A configuration field opens.
 - 2) Select or enter the configuration value for the Attribute.
- To delete an Attribute, select the **Delete** button for the Attribute.

The Attribute is deleted.

14. Select **next**.

The Associated Locations step opens.

15. Define the Location Eligibility Rules for the Promotion.

Figure 12-9: 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 Define Targets step opens.

17. Define the Segment Target Eligibility Rules for the Promotion:

Figure 12-10: 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.

Targeting Type: Static Targeting Dynamic Targeting

Figure 12-11: 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 662](#) for more information.

Dynamic Targeting Option [Radio Buttons](#) open.

Dynamic Targeting Option: **Targets Added Only** **Targets Added and Removed**

Figure 12-12: 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.



If Franchisee support is enabled, and one or more Franchisees are associated with the Promotion, the Promotion will create a default Target of the Customers associated with the selected Franchisee(s).

- 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.](#)

18. 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 24 on page 373.](#)

19. Define the Target Filter for each Segment Target:

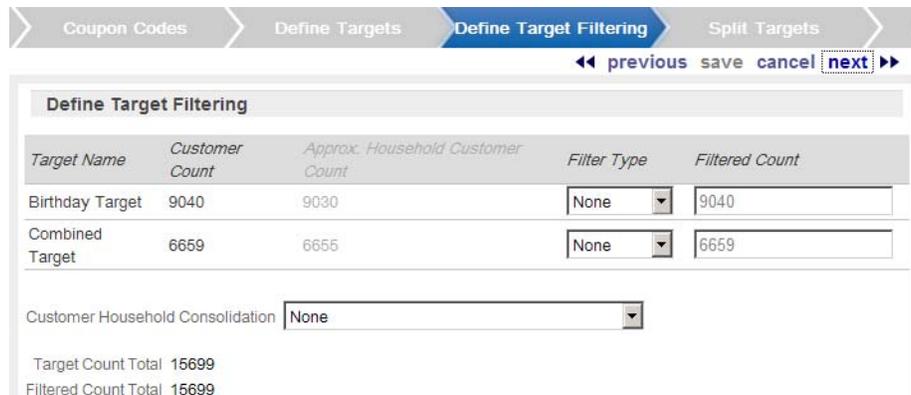


Figure 12-13: Define Target Filtering Step

- 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.
- If the Filter Type for the Segment is Top Sales or Random, enter the **Filter Count** of Customers eligible for the Promotion.

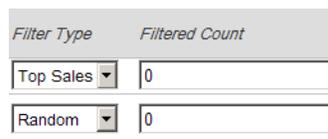


Figure 12-14: Enter Filter Count

20. 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.

21. Click **next**.

The Split Targets step opens.

Target Name	Customer Count	Split Count	%
Birthday Target	8000		100.00%
Combined Target	5000		100.00%

Figure 12-15: Split Targets Step

22. 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.).

Target Name	Customer Count	Split Count	%
Birthday Target	8000		100.00%
Birthday Target_1		2666	33.33
Birthday Target_2		2667	33.34
Birthday Target_3		2667	33.34
Combined Target	5000		100.00%
Combined Target_1		2500	50.00
Combined Target_2		2500	50.00

Figure 12-16: 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.

Split Count	%
(-67)	0.00%
2666	33.33
2600	32.50
2667	33.34
(+500)	100.00%
3000	60.00
2500	50.00

Figure 12-17: Split Counts Incorrect

d. If necessary, remove a Split by clicking the **Delete Link** for the Split.

23. Click **next**.

The Control Groups step opens.

24. Use the **Radio Buttons** to select the type of Control Groups:



Figure 12-18: 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 25 on page 374](#).

- ❑ **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

Control Groups			
<input type="radio"/> None <input checked="" type="radio"/> Promotion Level <input type="radio"/> Target Level			
Promotion Targets			
Target Name	Original Count	New Count	%
Birthday Target_1	2666	2666	20.51
Birthday Target_2	2667	2667	20.52
Birthday Target_3	2667	2667	20.52
Combined Target_1	3000	3000	23.08
Combined Target_2	2000	2000	15.38
Iskadjf;iskfjas - Ctl	0	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	100%

Figure 12-19: 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.

Control Groups				
<input type="radio"/> None <input type="radio"/> Promotion Level <input checked="" type="radio"/> Target Level				
Promotion Targets			Control Groups	
Target Name	Original Count	New Count	Control Group Count	%
Birthday Target_1	2666	2666	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Birthday Target_2	2667	2667	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Birthday Target_3	2667	2667	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Combined Target_1	3000	3000	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Combined Target_2	2000	2000	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	0	

Figure 12-20: 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.

25. Click **next**.

The Export Channels step opens.

26. For each Split/Target, select the method used to contact the Customers in each Split/Target.



Figure 12-21: 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.

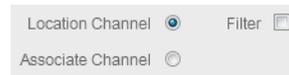


Figure 12-22: Channel Filter Options

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 12-23: 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 12-24: Numeric Attribute Filter

27. Click **next**.

- If **Include Social Listening** was selected, the Social Listening step opens. Continue with [step 28 on page 376](#).
- If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with [step 32 on page 378](#).
- If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with [step 34 on page 379](#).

28. Define the keywords used by the Social Listening process:

Target Name	Social Network	Targeted Subscribers	Keyword(s) To Listen For	Copy Keywords
Target Customers	Facebook	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
Target Customers	Twitter	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
LG New Customers	Facebook	2387	Keyword(s): Add Remove	Copy To All Copy To Same Network Only

Figure 12-25: 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.

29. Click **next**.

The Social Listening Schedule step opens.

30. Configure the frequency at which the Job will check social media:

Complete the scheduling parameters for the social listening.

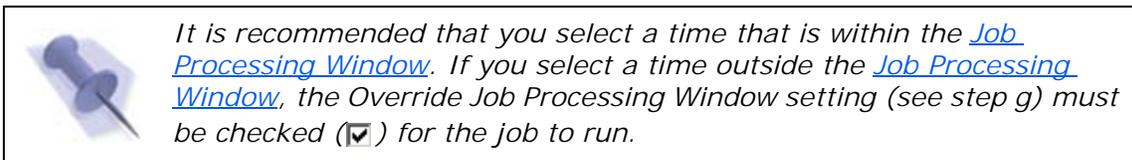
Social Listening Job Schedule

Job Execution Frequency (Please select) ▾

Figure 12-26: 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.



- 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.

31. 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 34 on page 379](#).

32. Configure the Event Definition.

Split Targets > Control Groups > Export Channels > **Event Definition** > Budget > Options After Save

◀ previous save cancel next ▶

Event Description

Event Image

Update Image

No image specified

Event Documents

There are no documents attached for this event.

[Attach a document](#)

Figure 12-27: 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.

Event Documents	
Attach a document	
Document name	
Gettysburg_Address.doc	Remove

Figure 12-28: Event Documents List

The document is removed from the [List](#).

33. Click **next**.

The Budget step opens.

34. 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:

Coupon Codes > Define Targets > Budget > Options After Save			
◀ previous save cancel next ▶			
Budget			
Promotion Costs			
Description	Budget Amount	Actual Amount	
	0.00	0.00	
Add			

Figure 12-29: Budget Step for an Untargeted Promotion

◀ previous save cancel next ▶

Budget

Promotion Costs

Description	Budget Amount	Actual Amount
	0.00	0.00

[Add](#)

Target Costs

Target Name	Channel	Qty	Budget			Actual		
			Fixed	CPM	Total	Fixed	CPM	Total
Birthday Target_1	Mail	2666			0.00			0.00
Birthday Target_2	Email	2067			0.00			0.00
Birthday Target_3	Phone	2667			0.00			0.00
Combined Target_1	Mail	2500			0.00			0.00
Combined Target_2	Phone	2000			0.00			0.00

Figure 12-30: Budget Step for a Targeted Promotion

- 1) Click the **Add** [List](#).

A new Promotion Cost line is added to the [List](#).

Promotion Costs

Description	Budget Amount	Actual Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
	0.00	0.00

[Delete](#)

[Add](#)

Figure 12-31: 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.

35. Click **next**.

The Options After Save step opens.

36. 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:

Options After Save

After saving this promotion, also perform the following actions:

- Generate**
Start a job to generate promotion target data.
- Approve**
Set this promotion's status to Approved.
- Export**
Start a job to create files for exporting this promotion to an external/POS system.

Dynamic Promotion Options
Set the export option for the Dynamic Promotion Job processing.

- Output Additions Only**
Only customers added to the event as a result of segment processing will be exported.
- Output All Updates**
All customers updated or added to the event as a result of segment processing will be exported.

Figure 12-32: 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.

37. Click **next**.

The Review step opens.

38. 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.

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.

The screenshot shows the 'New Promotion Wizard' interface. On the left is a sidebar menu with the following items: Promotion Type (selected), General Information, Campaign, Start / End Date, Generic Attributes (with sub-item 'No attributes defined'), Associated Locations, Define Targets, Budget, Options After Save, Review (highlighted in blue), and Review. The main content area is titled 'Promotion Type' and contains a list of radio button options: Coupon (with an unchecked checkbox for 'Enable Serialized Coupon Management'), Product, Coupon With Bounceback, Product With Bounceback, Message, Award, and Entitlement. At the top of the main area, there is a breadcrumb trail: Promotion Type > General Information > Campaign > Start / End Date > Generic Attributes > Associat. Below the breadcrumb trail are navigation buttons: << previous, save, cancel, next >>.

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:

The screenshot shows the 'General Information' step of the wizard. The breadcrumb trail at the top is: Promotion Type > General Information > Campaign > Start / End Date. Below the breadcrumb trail are navigation buttons: << previous, save, cancel, next >>. The form contains three fields: a 'Name' text field, a larger 'Description' text area, and an 'Include Social Listening' checkbox which is currently unchecked.

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.

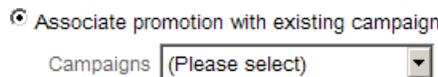


Figure 13-4: Campaigns Dropdown Menu

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:

General Information Campaign **Start / End Date** Generic Attributes Assoc

<< previous save cancel next >>

Start Date 2011-09-08

Start Time 12 :00 AM

End Date

End Time 11 :59 PM

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**.
 - If Franchisee support is not enabled, the Award Certificate step opens. Continue with step 12.
 - If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

10. Select the Franchisee(s) to associate with the Promotion.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	12781	anything	anything
<input type="checkbox"/>	14293	CATSRUS	
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers
<input type="checkbox"/>	1107	Dairy Queen - Chicago	Dairy Queen - Chicago
<input type="checkbox"/>	1106	Dairy Queen - Georgia2	Dairy Queen - Georgia
<input type="checkbox"/>	1112	Dairy Queen - Houston	Franchisee DQ - Houston TX
<input type="checkbox"/>	607	Dairy Queen - Marietta	Dairy Queen Marietta

Figure 13-7: Promotion Franchisees Step

11. Select **next**.

The Award Certificate step opens.

12. Configure the Award Certificate:

Award Certificate Setup

Please select card type and award program to manage the awards

Card Type Name:

Award Program:

Coupon Prefix:

Amount (USD):

Award Validity Period

Fixed Relative

Start Date: Validity Period:

End Date: Period Type:

Figure 13-8: 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 13-9: 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 13-10: Award Amount Error

See also: The *Relate Configuration Guide* for more information about configuring the maximum Award amount.

13. 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**.
14. Click **next**.
 - If Franchisee support is not enabled, the Generic Attributes step opens. Continue with step 17.
 - If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

15. Select the Franchisee(s) to associate with the Promotion.

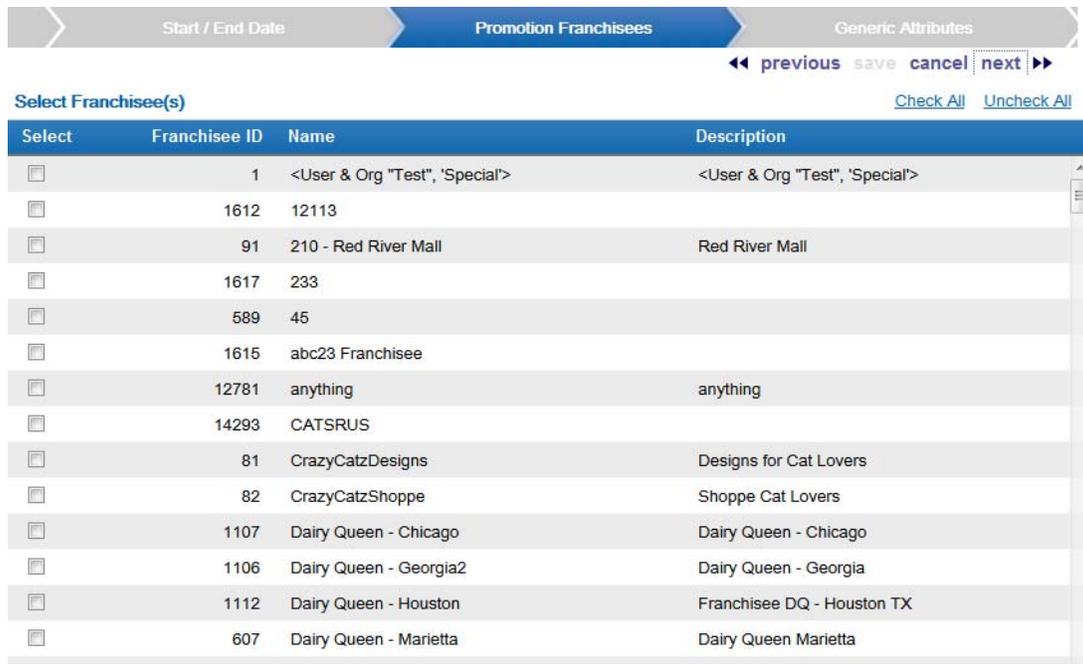


Figure 13-11: Promotion Franchisees Step

16. Select next.

The Generic Attributes step opens.

17. Select or enter the configuration values for each of the **Required** Attributes.

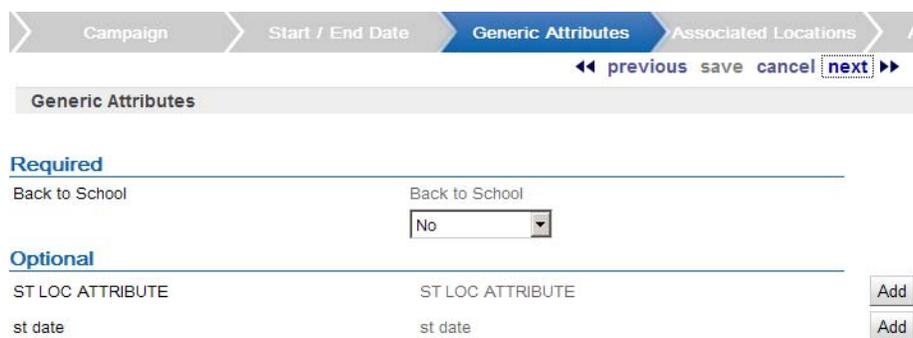


Figure 13-12: Generic Attributes Step

18. Configure any necessary **Optional** Attribute(s):

- To Add an Attribute:
 - 1) Select the **Add** button for the Attribute.

A configuration field opens.

2) Select or enter the configuration value for the Attribute.

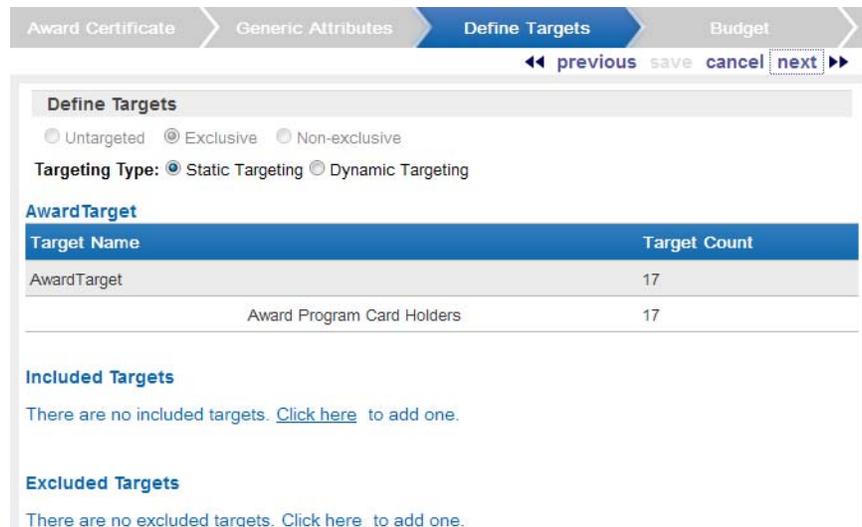
- ❑ To delete an Attribute, select the **Delete** button for the Attribute.

The Attribute is deleted.

19. Select **next**.

The Define Targets step opens.

20. Define the Segment Target Eligibility Rules for the Promotion:



Define Targets

Untargeted
 Exclusive
 Non-exclusive

Targeting Type: Static Targeting Dynamic Targeting

AwardTarget

Target Name	Target Count
AwardTarget	17
Award Program Card Holders	17

Included Targets
There are no included targets. [Click here](#) to add one.

Excluded Targets
There are no excluded targets. [Click here](#) to add one.

Figure 13-13: 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.

Targeting Type: Static Targeting Dynamic Targeting

Figure 13-14: 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 662](#) for more information.

Dynamic Targeting Option [Radio Buttons](#) open.

Dynamic Targeting Option: **Targets Added Only** **Targets Added and Removed**

Figure 13-15: 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.



If Franchisee support is enabled, and one or more Franchisees are associated with the Promotion, the Promotion will create a default Target of the Customers associated with the selected Franchisee(s).

- 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 13-16: Award Target with Count of Zero

21. 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 27 on page 395](#).

22. Define the Target Filter for each Segment Target:

Target Name	Customer Count	Approx. Household Customer Count	Filter Type	Filtered Count
Birthday Target	9040	9030	None	9040
Combined Target	6659	6655	None	6659

Customer Household Consolidation: None

Target Count Total: 15699
Filtered Count Total: 15699

Figure 13-17: 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.

Filter Type	Filtered Count
Top Sales	0
Random	0

Figure 13-18: Enter Filter Count

- 23. 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.

- 24. Click **next**.

The Split Targets step opens.

Define Targets
Define Target Filtering
Split Targets
Control Groups
Exit

◀ previous
 save
 cancel
next
 ▶

Split Targets

Target Name	Customer Count	Split Count	%	
Birthday Target	8000		100.00%	Split
Combined Target	5000		100.00%	Split

Figure 13-19: Split Targets Step

- 25. 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.).

Target Name	Customer Count	Split Count	%	
<i>Birthday Target</i>	8000		100.00%	Split
Birthday Target_1		2666	33.33	Delete
Birthday Target_2		2667	33.34	Delete
Birthday Target_3		2667	33.34	Delete
<i>Combined Target</i>	5000		100.00%	Split
Combined Target_1		2500	50.00	Delete
Combined Target_2		2500	50.00	Delete

Figure 13-20: 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.

Split Count	%
<i>(-67)</i>	<i>0.00%</i>
2666	33.33
2600	32.50
2667	33.34
<i>(+500)</i>	<i>100.00%</i>
3000	60.00
2500	50.00

Figure 13-21: Split Counts Incorrect

- d. If necessary, remove a Split by clicking the **Delete** [Link](#) for the Split.

26. Click **next**.

The Control Groups step opens.

27. Use the [Radio Buttons](#) to select the type of Control Groups:

Figure 13-22: 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 28 on page 396](#).
- ❑ **Promotion Level** - The Control Group Customers are pulled from each Split/Target in proportions equal to the size of each Split/Target.

Target Name	Original Count	New Count	%
Birthday Target_1	2666	2666	20.51
Birthday Target_2	2667	2667	20.52
Birthday Target_3	2667	2667	20.52
Combined Target_1	3000	3000	23.08
Combined Target_2	2000	2000	15.38
Iskadjf;Iskfjas - Ctl	0	<input type="text" value="0"/>	<input type="text" value="0.00"/>
Total	13000	13000	100%

Figure 13-23: 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.

Control Groups				
<input type="radio"/> None <input type="radio"/> Promotion Level <input checked="" type="radio"/> Target Level				
Promotion Targets		Control Groups		
Target Name	Original Count	New Count	Control Group Count	%
Birthday Target_1	2666	2666	0	0.00
Birthday Target_2	2667	2667	0	0.00
Birthday Target_3	2667	2667	0	0.00
Combined Target_1	3000	3000	0	0.00
Combined Target_2	2000	2000	0	0.00
Total	13000	13000	0	

Figure 13-24: 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.

28. Click **next**.

The Export Channels step opens.

29. For each Split/Target, select the method used to contact the Customers in each Split/Target.

Export Channels				
Target Name	Mail	E-Mail	Phone	Channel Filter
LG New Customers_1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LG New Customers_3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 13-25: 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.

The screenshot shows a form with two radio buttons: 'Location Channel' (selected) and 'Associate Channel'. To the right is a 'Filter' checkbox which is checked.

Figure 13-26: 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.

The screenshot shows a 'Filter' checkbox checked. Below it is a text input field labeled 'Max Count Per <Store>' with the value '136'. Below that is a dropdown menu labeled 'Method' with 'Random' selected.

Figure 13-27: 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.

The screenshot shows a 'Method' dropdown menu with 'Top - Numeric Attribute' selected. Below it is an 'Attribute' dropdown menu with '(Please select)' selected.

Figure 13-28: Numeric Attribute Filter

30. Click **next**.

- If **Include Social Listening** was selected, the Social Listening step opens. Continue with [step 31 on page 398](#).

- ❑ 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 400](#).
- ❑ If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with [step 37 on page 401](#).

31. Define the keywords used by the Social Listening process:

Target Name	Social Network	Targeted Subscribers	Keyword(s) To Listen For	Copy Keywords
Target Customers	Facebook	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
Target Customers	Twitter	7822	Keyword(s): Add Remove	Copy To All Copy To Same Network Only
LG New Customers	Facebook	2387	Keyword(s): Add Remove	Copy To All Copy To Same Network Only

Figure 13-29: 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:

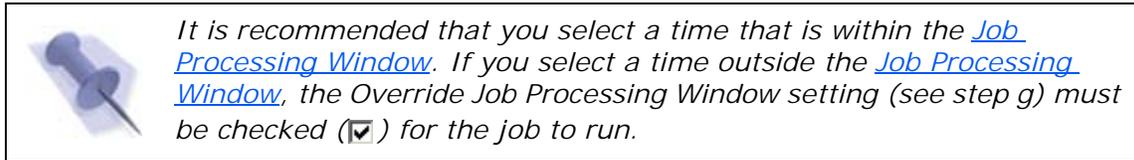


Figure 13-30: Social Listening Schedule Step

- 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.



- 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 401](#).

35. Configure the Event Definition.

Figure 13-31: 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.

Event Documents	
Attach a document	
Document name	
Gettysburg_Address.doc	Remove

Figure 13-32: 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:

Coupon Codes	Define Targets	Budget	Options After Save
◀ previous save cancel next ▶▶			
Budget			
Promotion Costs			
Description	Budget Amount	Actual Amount	
	0.00	0.00	
Add			

Figure 13-33: Budget Step for an Untargeted Promotion

Budget

Promotion Costs

Description	Budget Amount	Actual Amount
	0.00	0.00

[Add](#)

Target Costs

Target Name	Channel	Qty	Budget			Actual		
			Fixed	CPM	Total	Fixed	CPM	Total
Birthday Target_1	Mail	2666			0.00			0.00
Birthday Target_2	Email	2067			0.00			0.00
Birthday Target_3	Phone	2667			0.00			0.00
Combined Target_1	Mail	2500			0.00			0.00
Combined Target_2	Phone	2000			0.00			0.00

Figure 13-34: Budget Step for a Targeted Promotion

- 1) Click the **Add** [List](#).

A new Promotion Cost line is added to the [List](#).

Promotion Costs

Description	Budget Amount	Actual Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
	0.00	0.00

[Delete](#)

[Add](#)

Figure 13-35: 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:

Options After Save

After saving this promotion, also perform the following actions:

- Generate**
Start a job to generate promotion target data.
- Approve**
Set this promotion's status to Approved.
- Export**
Start a job to create files for exporting this promotion to an external/POS system.

Dynamic Promotion Options
Set the export option for the Dynamic Promotion Job processing.

- Output Additions Only**
Only customers added to the event as a result of segment processing will be exported.
- Output All Updates**
All customers updated or added to the event as a result of segment processing will be exported.

Figure 13-36: 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.

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.

The screenshot shows the 'New Promotion Wizard' interface. On the left is a sidebar menu with options: Promotion Type (selected), General Information, Campaign, Start / End Date, Generic Attributes, Associated Locations, Define Targets, Budget, Options After Save, Review, and Review. The main content area has a breadcrumb trail: Promotion Type > General Information > Campaign > Start / End Date > Generic Attributes > Associated Locations. Below the breadcrumb is a navigation bar with 'previous', 'save', 'cancel', and 'next' buttons. The 'Promotion Type' section contains a list of radio button options: Coupon (with a checkbox for 'Enable Serialized Coupon Management'), Product, Coupon With Bounceback, Product With Bounceback, Message, Award, and Entitlement. The 'Entitlement' option is selected.

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.

- Configure the General Information for the Promotion:

Figure 14-2: General Information Step

- Enter the **Name** of the Promotion in the Name [Text Field](#).
- Enter a **Description** of the Promotion in the Description [Text Field](#).
- 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.*

- Click **next**.

The Campaign step opens.

- 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**.
- If Franchisee support is not enabled, the Entitlement step opens. Continue with step 12.
 - If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step.

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

10. Select the Franchisee(s) to associate with the Promotion.

Select	Franchisee ID	Name	Description
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>
<input type="checkbox"/>	1612	12113	
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall
<input type="checkbox"/>	1617	233	
<input type="checkbox"/>	589	45	
<input type="checkbox"/>	1615	abc23 Franchisee	
<input type="checkbox"/>	12781	anything	anything
<input type="checkbox"/>	14293	CATSRUS	
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers
<input type="checkbox"/>	1107	Dairy Queen - Chicago	Dairy Queen - Chicago
<input type="checkbox"/>	1106	Dairy Queen - Georgia2	Dairy Queen - Georgia
<input type="checkbox"/>	1112	Dairy Queen - Houston	Franchisee DQ - Houston TX
<input type="checkbox"/>	607	Dairy Queen - Marietta	Dairy Queen Marietta

Figure 14-7: Promotion Franchisees Step

11. Select **next**.

The Entitlement step opens.

12. Configure the Entitlement:

Entitlement Event Setup

Please select card type and Entitlement program to manage the Entitlement

Card Type Name

Entitlement Program

Figure 14-8: 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.

Entitlement Program: [SW Program 3]

Entitlement Deal

Deal ID 4112	Deal Type TRANSACTION_DISCOUNT	Unlimited Redemption No
Deal Name Wild Arctic Up-Close Tour	Priority 1	Maximum Redeemable Count 2.00
Description Wild Arctic Up-Close Tour	Active Yes	
	Create Date 2014-06-20	

13. Click **next**.

The Generic Attributes step opens.

14. Select or enter the configuration values for each of the **Required** Attributes.

Campaign Start / End Date **Generic Attributes** Associated Locations As

previous save cancel **next** next

Generic Attributes

Required

Back to School Back to School

No

Optional

ST LOC ATTRIBUTE	ST LOC ATTRIBUTE	<input type="button" value="Add"/>
st date	st date	<input type="button" value="Add"/>

Figure 14-9: Generic Attributes Step

15. Configure any necessary **Optional** Attribute(s):

- To Add an Attribute:
 - 1) Select the **Add** button for the Attribute.
A configuration field opens.
 - 2) Select or enter the configuration value for the Attribute.
- To delete an Attribute, select the **Delete** button for the Attribute.
The Attribute is deleted.

16. Select **next**.

The Associated Locations step opens.

17. Define the Location Eligibility Rules for the Promotion.

Figure 14-10: 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](#).

18. 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).

19. If necessary, enter a **Deal Code** for the Deal:

Deal Id	Deal Name	Deal Type	Deal Code	Enabled
4112	Wild Arctic Up-Close Tour	Transaction Discount	<input type="text"/>	<input checked="" type="checkbox"/>

Figure 14-11: Associate Deals Step

20. Click **next**.

The Promo-Deal Attributes step opens.

21. Configure the Promo-Deal Attributes for the Promotion event:

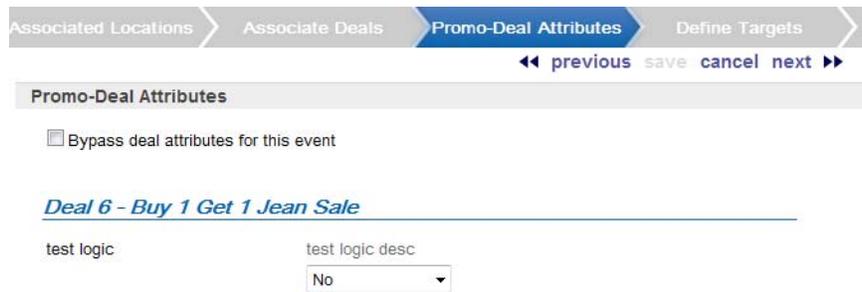


Figure 14-12: Promo-Deal Attributes Step

- 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 22.
 - **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).

22. Click **next**.

- If **Include Social Listening** was selected, the Social Listening step opens. Continue with [step 23 on page 411](#).
- If **Include Social Listening** was not selected, the Budget step opens. Continue with [step 27 on page 413](#).

23. Define the keywords used by the Social Listening process:

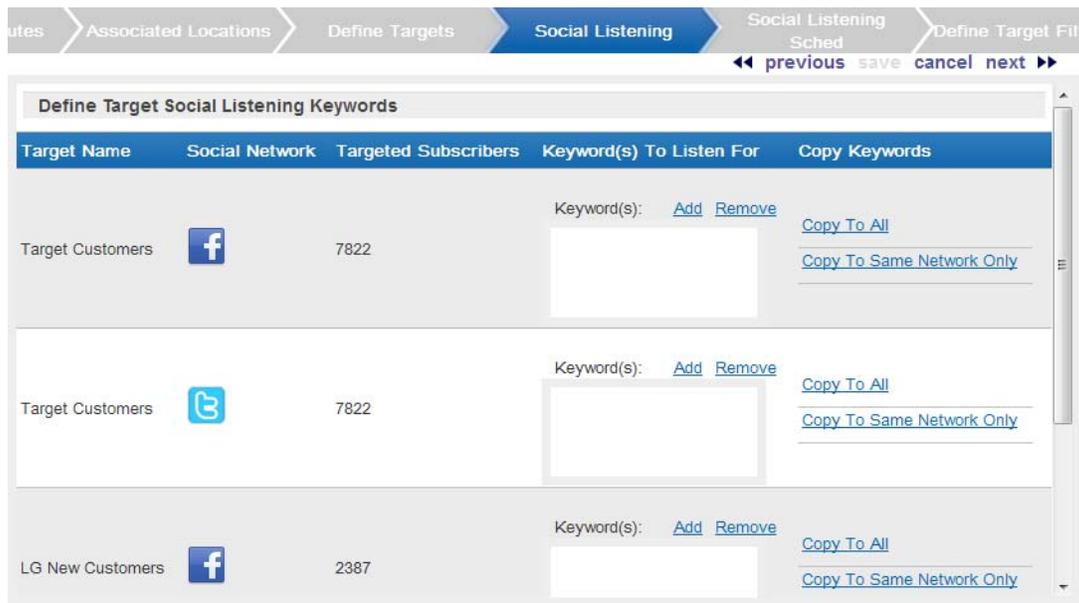


Figure 14-13: Social Listening Step

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.

24. Click next.

The Social Listening Schedule step opens.

25. Configure the frequency at which the Job will check social media:

Figure 14-14: 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.

26. Click **next**.

The Budget step opens.

27. 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:

Budget			
Promotion Costs			
Description	Budget Amount	Actual Amount	
	0.00	0.00	

[Add](#)

Figure 14-15: Budget Step for Targeted Promotion

Control Groups > Export Channels > **Budget** > Options After Save

◀ previous save cancel next ▶

Budget

Promotion Costs

Description	Budget Amount	Actual Amount
	0.00	0.00

[Add](#)

Target Costs

Target Name	Channel	Qty	Budget			Actual		
			Fixed	CPM	Total	Fixed	CPM	Total
Birthday Target_1	Mail	2666	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>	0.00
Birthday Target_2	Email	2067	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>	0.00
Birthday Target_3	Phone	2667	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>	0.00
Combined Target_1	Mail	2500	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>	0.00
Combined Target_2	Phone	2000	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>	0.00

- 1) Click the **Add** [Link](#).

A new Promotion Cost line is added to the [List](#).

Promotion Costs

Description	Budget Amount	Actual Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
	0.00	0.00

[Delete](#)

[Add](#)

Figure 14-16: 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.

28. Click **next**.

The Options After Save step opens.

29. 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:



After saving this promotion, also perform the following actions:

- Approve**
Set this promotion's status to Approved.
- Export**
Start a job to create files for exporting this promotion to an external/POS system.

Figure 14-17: Options After Save Step

- Approve** - Automatically approve the promotion.
 - Export** - Export the Promotion data to external systems, including POS systems.
30. Click **next**.
The Review step opens.
31. 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.

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](#).

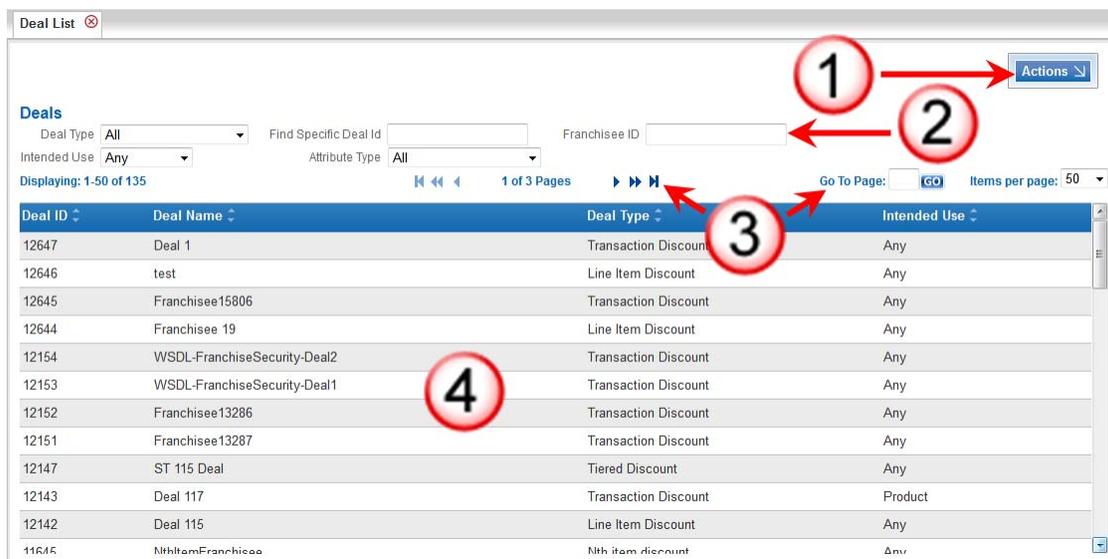


Figure 15-1: Deal List

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 420 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 420 for more information.
3	Page Navigation - Page Navigation for the List .
4	<p>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.</p> <p>The following information is displayed for each Deal:</p> <ul style="list-style-type: none"> ■ Deal ID - Unique ID for the Deal. ■ Deal Name - Name of the Deal. ■ Deal Type - The type of Deal. See “Deal Types” on page 417. ■ Intended Use - Intended Use of the Deal. See “Intended Promotion Type” on page 418.

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 424](#).



Filters

The Deal [List](#) page includes the following [Filter](#) fields:

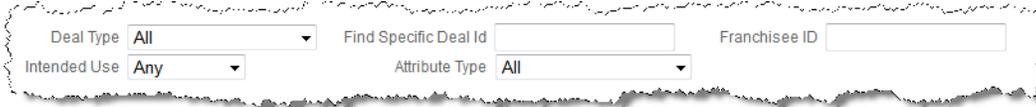


Figure 15-2: Filter Menus

- **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 417](#) for a list of the possible values.
- **Intended Use** - Filters the [List](#) by the Intended Promotion Type. See [“Intended Promotion Type” on page 418](#) for a list of possible values.
- **Franchisee ID** - This [Text Field](#) filters the [List](#) by the Franchisee associated with the Deal.
- **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.

The screenshot shows the Deal Window interface with the following sections and data:

General

Deal ID	9583	Deal Type	Tiered Discount	Priority	1
Name	test	Subtotal Minimum		Deal Count Limit	
POS Name	test	Subtotal Maximum		Intended Industry	Merchandise
Intended Promotion Type	Product	Maximum Award Amount		Comments	
Award Value Distribution	Prorate award value across qualifying items				

Qualifying Items

Set Seq	Threshold	Discount
1	Quantity, Tiered: 100	Percent Off: 10.00

Details

Type	Description	Include	Exclude
DEPT	900: Clothing Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Discount Tiers

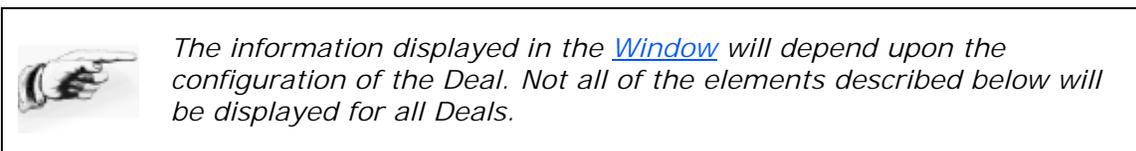
Tier		Threshold #		Discount %
1	Buy	100	Get	10.00
2	Buy	200	Get	20.00

Advanced Parameters

Include Redlines	No	Allow Zero Price	No
Include Non-Merchandise Charges	No	Allow items to be used in other Deals	No

Figure 15-3: Deal Window

The Deal [Window](#) includes the following information:



- **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 418](#) for a list of possible values.
 - ❑ **Award Value Distribution** - Indicates whether the Deal discount applies to each discounted Item (**No**), or to the set of all discounted Items (**Yes**).
 - ❑ **Deal Type** - The type of Deal. See [“Deal Types” on page 417](#) 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.
- **Attributes** - Attributes for the Deal. This includes the following information:
 - ❑ Attribute name.
 - ❑ Attribute value.
- **Associated Franchisees** - Franchisees associated with the Deal. This includes the following information:
 - ❑ ID for the Franchisee.
 - ❑ Name of the Franchisee.

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 is opened in the Deal Creation [Wizard](#), with all of the fields populated with the current Deal configurations.

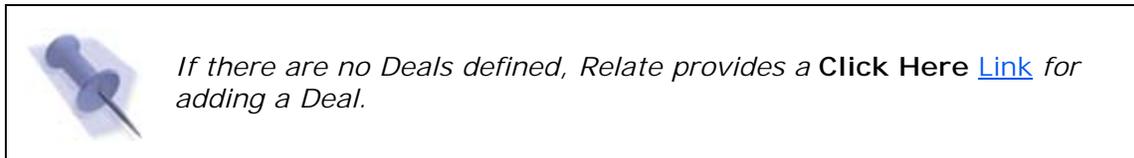
- Use [Wizard Navigation](#) to move through the [Wizard](#) and make any necessary changes.
- Click **save** when you are finished making changes. The [Wizard](#) closes, saving the entered configurations and returning to the [Deal List](#).

- 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 424](#).

Create a Deal

To create a Deal in Relate:

1. In the [Deal List](#) page, click **Create** in the [Actions Menu](#).



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**.
The Franchisees step opens.
 4. Select the Franchisees to associate with the Deal.

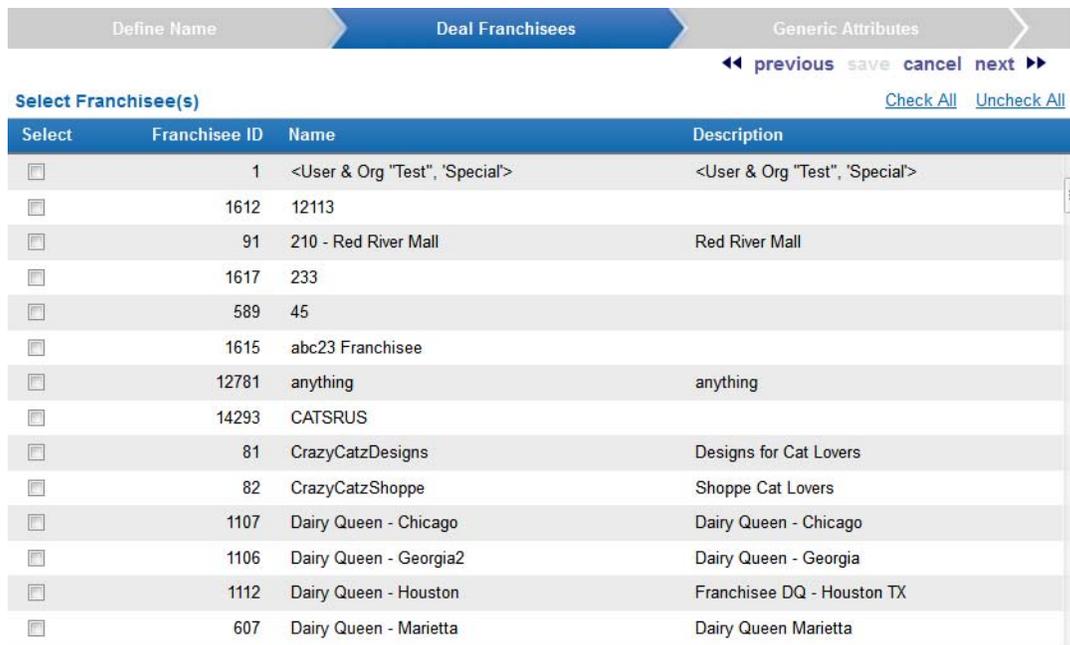


Figure 15-5: Franchisees Step

- Select the **Check All Link** to associate the Deal with all Franchisees.

- ❑ If only a subset of Franchisees will be associated with the Deal, select the [Check Box](#) for each Franchisee to be included.
 - ❑ Select the **Uncheck All** [Link](#) to unselect all selected Franchisees.
5. Click **next**.
The Generic Attributes step opens.
6. Configure the Generic Attributes for the Deal.

Generic Attributes		
Required		
DEAL_CREATED_BY	Deal Created By	<input type="text"/>
Optional		
NUMBER_OF_ITEMS	Estimated Number of Deal Items	Add
DEAL_COST	Estimated Deal Cost	Add
SEASONAL_DEAL	Is Deal Seasonal?	Add
DEAL_TYPE	Deal Type	Add
DEAL_START_DATE	Deal Start Date	Add
ALL_ITEMS_DEAL	Is deal for ALL Items?	Add
CREATED_BY	Deal Created by	Add

Figure 15-6: Generic 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.
7. 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 8.
 - ❑ If the selected Deal Type is **Kit, or Buy X Get Y** continue with [step 20 on page 433](#).
 - ❑ If the selected Deal Type is **Tiered Discount**, continue with [step 26 on page 438](#).

8. Configure the Qualifying Items settings:

Figure 15-7: 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.



Relate will only display Items available to the Franchisee(s) selected in [step 4 on page 425](#).

9. Click **next**.
 - If the Deal Type is **Transaction Discount**, continue with step 10.
 - If the Deal Type is **Line Item Discount**, continue with [step 12 on page 429](#).
 - If the Deal Type is **Fixed Quantity/Price**, continue with [step 14 on page 430](#).
 - If the Deal Type is **Gift with Purchase**, continue with [step 16 on page 430](#).
 - If the Deal Type is **Buy X Get X**, continue with [step 18 on page 432](#).
10. Define the awards for a Transaction Discount type:

Define Award Items

Priority Maximum Award Amount Deal Count Limit

Discount Type Discount Value * Max Quantity

Prorate award value across qualifying items
 Issue award to each qualifying item

Included Items

Type	Description
All Items	

Excluded Items

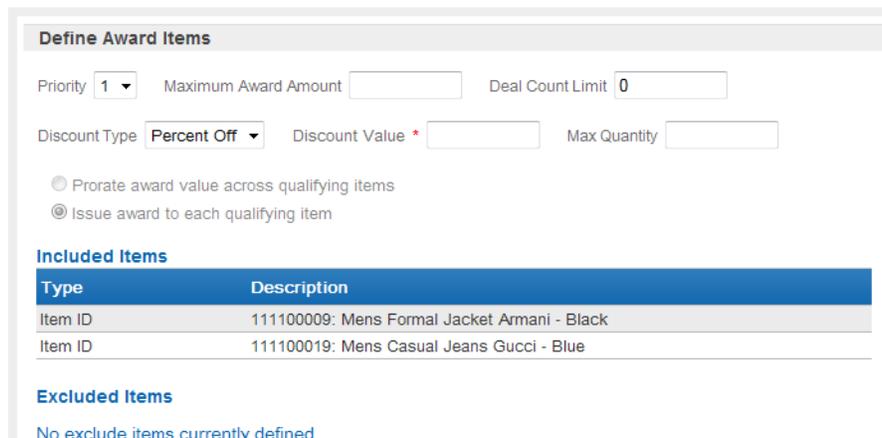
No exclude items currently defined.

Figure 15-8: 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.

11. Continue with [step 29 on page 440](#).

12. Define the awards for a Line Item Discount type:



Define Award Items

Priority Maximum Award Amount Deal Count Limit

Discount Type Discount Value * Max Quantity

Prorate award value across qualifying items
 Issue award to each qualifying item

Included Items

Type	Description
Item ID	111100009: Mens Formal Jacket Armani - Black
Item ID	111100019: Mens Casual Jeans Gucci - Blue

Excluded Items
 No exclude items currently defined.

Figure 15-9: 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.

13. Continue with [step 29 on page 440](#).

14. Define the Award for the Fixed Quantity/Price Deal type:

Define Award Items

Priority Maximum Award Amount Deal Count Limit

Discount Type Discount Value * Max Quantity

Prorate award value across qualifying items
 Issue award to each qualifying item

Included Items

Type	Description
DEPT	900: Clothing Department
DEPT	920: Grocery Department

Excluded Items

Type	Description
Item ID	111100016: Womens Evening Jacket Fendi - Blue

Figure 15-10: 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.*

15. Continue with [step 29 on page 440](#).

16. Define the Award for a Gift with Purchase Deal type:

Define Name > Qualifying Items > **Award Items** > Advanced Parameters > Review

◀ previous save cancel next ▶▶

Define Award Items

Priority Maximum Award Amount Deal Count Limit

Gift

No include items currently defined. [Click here](#) to add one.

Figure 15-11: 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.

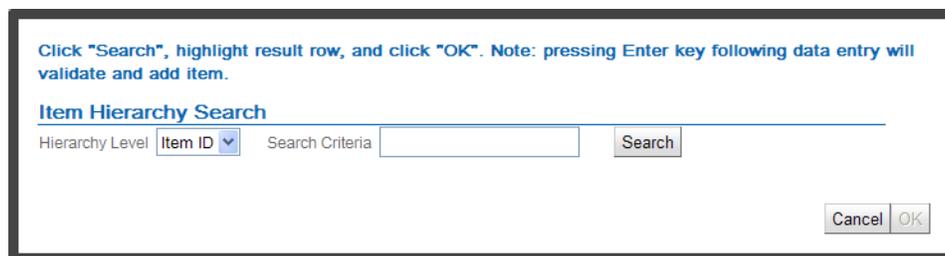


Figure 15-12: Item Hierarchy Search Window

- 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](#).

The screenshot shows the 'Define Award Items' form with the following fields and values:

- Priority: 1 (dropdown)
- Maximum Award Amount: (empty text box)
- Deal Count Limit: 0 (text box)
- Discount Type: Percent Off (dropdown)
- Discount Value: * (empty text box)
- Max Quantity: (empty text box)

Below the form is a table titled 'Gift' with the following data:

Type	Description
Item ID	1503: \$10 XPay Gift Card

Figure 15-13: Gift Item Selected

6) Define the **Discount Type**, **Discount Value**, and **Max Quantity** of the Gift (see above).

17. Continue with [step 29 on page 440](#).

18. Define the Award for a Buy X Get X Deal type:

The screenshot shows the 'Define Award Items' form with the following fields and values:

- Priority: 1 (dropdown)
- Maximum Award Amount: (empty text box)
- Deal Count Limit: 0 (text box)
- Award Quantity: * 1 (text box)
- Discount Type: Percent Off (dropdown)
- Discount Value: * (empty text box)
- Max Quantity: (empty text box)

Below the form are two radio button options:

- Prorate award value across qualifying items
- Issue award to each qualifying item

Below the options is a table titled 'Included Items' with the following data:

Type	Description
DEPT	920: Grocery Department
DEPT	925: Accessory Department

Below the table is a section titled 'Excluded Items' with the text: No exclude items currently defined.

Figure 15-14: 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.

19. Continue with [step 29 on page 440](#).

20. Configure the Qualifying Items settings:

Figure 15-15: 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.

If the imported Deal includes Items that are not associated with the Franchisees selected in [step 4 on page 425](#), an error will be displayed, and each invalid Item will be tagged with a red exclamation point.



Define Qualifying Items

Subtotal Minimum Subtotal Maximum

One or more item filters are not associated to the selected franchisees. See lines highlighted below.

Threshold Style Threshold Type Threshold *

[Import Existing Deal](#)

Included Items [Add](#) [Remove](#) [Remove All](#) [Import Csv](#)

Type	Description
! Item ID	111100020: Mens Casual Shorts Gucci - Black
! Item ID	111100021: Womens Casual Jeans Armani - Blue
! Item ID	111100022: Womens Casual Shorts Armani - Beige
! Item ID	111100023: Womens Casual Jeans Gucci - Blue

You must remove each marked Item from the Deal before you can continue or save.

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:

SET #1

Threshold Style Threshold Type Threshold *

Included Items

No include items currently defined. [Click here](#) to add one. [click here](#) to import csv file.

Excluded Items

No exclude items currently defined. [Click here](#) to add one. [click here](#) to import csv file.

Figure 15-16: 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.

21. Click **next**.

- ❑ If the Deal Type is **Kit**, continue with [step 22 on page 435](#).
- ❑ If the Deal Type is **Buy X Get Y**, continue with [step 24 on page 436](#).

22. Define the Award(s) for the Kit Deal type:

Figure 15-17: 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.

23. Continue with [step 29 on page 440](#).

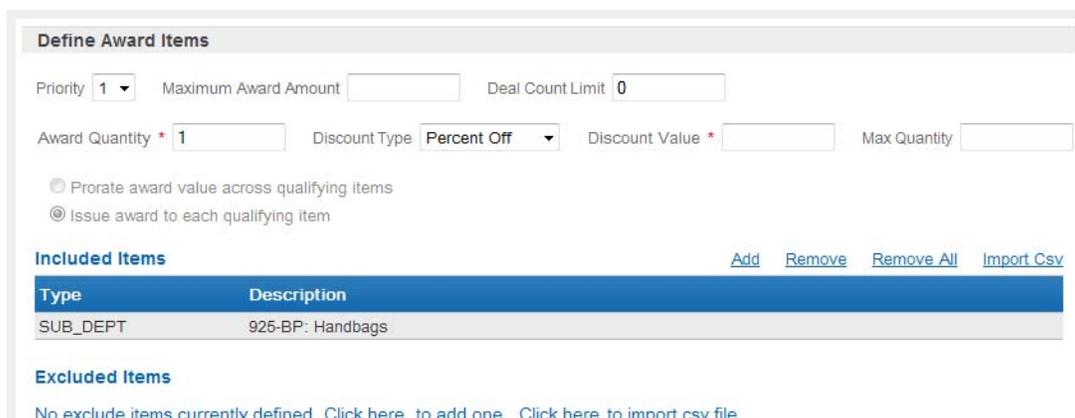
24. Define the Award(s) for a Buy X Get Y Deal type:

The screenshot shows a multi-step wizard for defining award items. The current step is 'Award Items'. The interface includes a progress bar at the top with steps: Define Name, Qualifying Items, Award Items (highlighted), Advanced Parameters, and Review. Below the progress bar are navigation buttons: previous, save, cancel, and next. The main content area is titled 'Define Award Items' and contains the following fields and sections:

- Priority:** A dropdown menu currently showing '1'.
- Maximum Award Amount:** An empty text input field.
- Deal Count Limit:** A text input field containing the value '0'.
- Included Items:** A section with the text 'No include items currently defined. [Click here](#) to add one. [Click here](#) to import csv file.'
- Excluded Items:** A section with the text 'No exclude items currently defined. [Click here](#) to add one. [Click here](#) to import csv file.'

Figure 15-18: 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.



Define Award Items

Priority Maximum Award Amount Deal Count Limit

Award Quantity * Discount Type Discount Value * Max Quantity

Prorate award value across qualifying items
 Issue award to each qualifying item

Included Items [Add](#) [Remove](#) [Remove All](#) [Import Csv](#)

Type	Description
SUB_DEPT	925-BP: Handbags

Excluded Items

No exclude items currently defined. [Click here](#) to add one. [Click here](#) to import csv file.

Figure 15-19: 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.

25. Continue with [step 29 on page 440](#).

26. Configure the Qualifying Items for the Tiered Deal:

Define Name **Qualifying Items** Tiered Discount Advanced Parameters Review

◀ previous save cancel **next** ▶

Define Qualifying Items

Subtotal Minimum Subtotal Maximum

Threshold Style **Tiered** Threshold Type **Quantity** Discount Type * **Percent Off**

[Import Existing Deal](#)

Included Items
No include items currently defined. [Click here](#) to add one. [Click here](#) to import csv file.

Excluded Items
No exclude items currently defined. [Click here](#) to add one. [Click here](#) to import csv file.

Figure 15-20: 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.

27. Click **next** to continue.

28. Define the Discount Tiers for the Deal:

Tier	Threshold #	Discount %
1	Buy	Get
2	Buy	Get

Figure 15-21: Tiered Discount Definition (Percent Off)

Tier	Threshold #	Discount Amount
1	Buy	Get
2	Buy	Get

Figure 15-22: Tiered Discount Definition (Amount Off)

Tier	Threshold #	Discount Override Price
1	Buy	For
2	Buy	For

Figure 15-23: 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 26 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 26 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.

29. Click **next**.

30. Configure the Advanced Parameters:

Figure 15-24: 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.

31. 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 15-25: 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.

32. 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 15-26: 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 31).

- 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.

33. Click **next**.

The Review step opens.

34. 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.

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 444](#) - Describes the Card Definitions page and its associated [Layer List](#).
- [“Card Definition” on page 446](#) - Describes Card Definitions and the procedures for managing them.
- [“Create New Card Definition” on page 454](#) - Provides the procedure for creating a new Card Definition.
- [“Card Series Distribution” on page 458](#) - 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 467](#).

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.

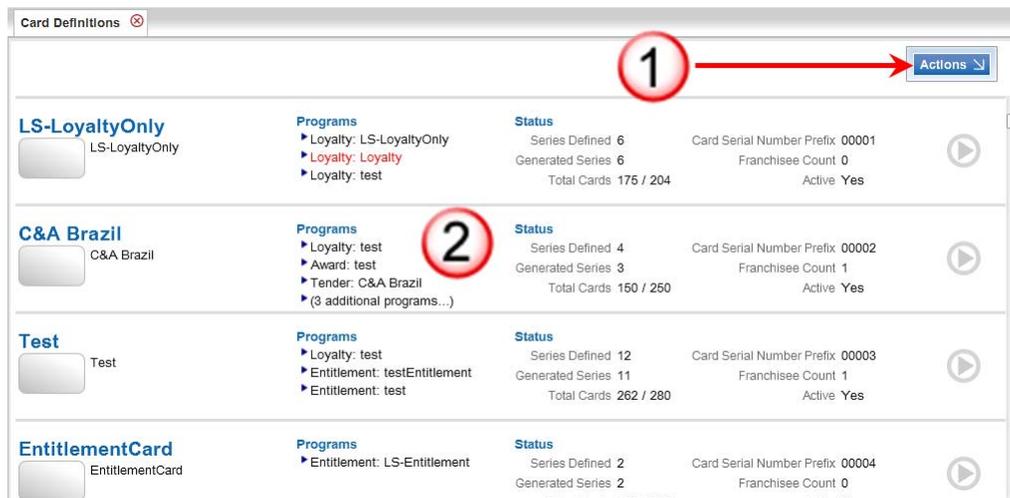


Figure 16-1: Card Definitions Page

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	<p>Card Definitions Layer List - A Layer List of Card Definitions currently in the system. The following information is displayed for each Card Definition:</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div> <p style="text-align: center;">Figure 16-2: Card Definition in Layer List</p> <ul style="list-style-type: none"> ■ The name of the Card Definition. ■ A description of the Card Definition. ■ Programs - A list of Programs associated with the Card Definition. <i>Inactive Programs are displayed in red.</i> <p>Each Program is listed in the format [Program Type] : [Program Name].</p>

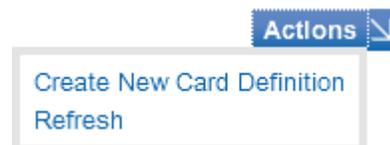
Table 16-1: Card Definitions List Page Key (continued)

Item	Description
<p>2 (cont'd)</p>	<ul style="list-style-type: none"> ■ Status - This area displays the following information about the Card Definition: <ul style="list-style-type: none"> ❑ 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. <hr/> <p style="text-align: center;"><i>See also:</i> The <i>Relate Configuration Guide</i> for more information about Franchisees.</p> <hr/> ❑ 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 454](#) 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.

The screenshot shows the 'Loyalty0Decimals' Card Definition page. At the top, there is a header with the card name 'Loyalty0Decimals' and a list of programs: 'Loyalty: Loyalty0Decimals', 'Award: test', and 'Entitlement: test'. To the right, the status is shown as 'Series Defined 3', 'Generated Series 3', and 'Total Cards 52 / 150'. Further right, 'Card Serial Number Prefix 00009' and 'Franchisee Count 3' are displayed, with 'Active Yes' at the bottom right. Below the header, there are two tabs: 'Programs' and 'Card Series Distribution'. The 'Programs' tab is active, showing a table with two rows of program details.

Program Name	Type	Create Date	Allow Foreign Currency	Active	Effective Date	Card required	Program ID
Loyalty0Decimals	Loyalty	2012-09-17	Yes	Yes	2010-12-01	No	2515
test	Award	2014-07-14	Yes	Yes	2014-07-14	No	18618

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:

The screenshot shows the 'Test-SWA-UserOrgs' Card Definition Basics section. It features a header with the card name 'Test-SWA-UserOrgs' and a list of programs: 'Tender: SWA-UserOrgs'. To the right, the status is shown as 'Series Defined 5', 'Generated Series 4', and 'Total Cards 63 / 215'. Further right, 'Card Serial Number Prefix 00050' and 'Franchisee Count 3' are displayed, with 'Active Yes' at the bottom right.

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 450](#).

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.

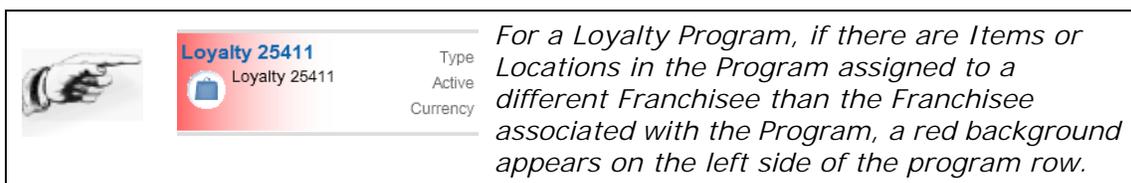
Programs		Card Distribution	
Programs			
3-GC Pin Reqrd W/out Card	Type Tender	Create Date 2011-04-13	Allow Foreign Currency No
3-GC Pin Reqrd W/out Card	Active Yes	Effective Date 2011-04-13	Card required No
	Currency USD	Expiry Date 2016-04-13	Program ID 370
<hr/>			
Loyalty 0414-1	Type Loyalty	Create Date 2011-04-14	Allow Foreign Currency No
Loyalty 0414-1	Active Yes	Effective Date 2011-04-14	Card required No
	Currency -	Expiry Date 2016-04-14	Program ID 418

Figure 16-5: Programs Tab



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.

Programs		Card Series Distribution				
Card Series Distribution						
NoGen	Card Serial Number Prefix 00004	Active Yes	Generated Yes	Batch Count 1		
 NoGen	Sequence No. 02	Create Date 2014-07-16	Incremental Generation Yes	Card Count 100		
	Expiry Date none	Start Date	End Date	Generated Card Count 2		
TestEntitlementCards	Card Serial Number Prefix 00004	Active Yes	Generated Yes	Batch Count 1		
 TestEntitlementCards	Sequence No. 01	Create Date 2014-06-05	Incremental Generation No	Card Count 100		
	Expiry Date none	Start Date	End Date	Generated Card Count 100		

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**).



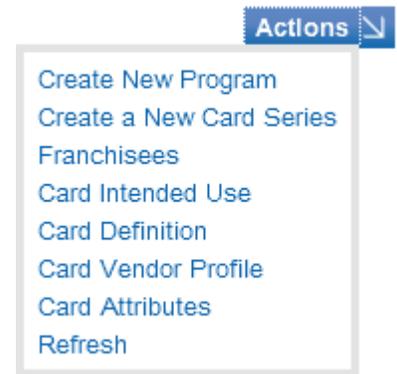
Generally, Cards that are generated incrementally are mailed to customers, while Cards that are generated all at once are given to customers immediately at the POS.

- **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 503](#) for more information.
- **Create A New Card Series** - Create a new Series for the Card Definition. See [“Create a Card Series Distribution” on page 460](#) for more information.
- **Franchisees** - View or edit the Franchisees associated with the Card Definition. See [“View/Edit Franchisees” on page 453](#) 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 450](#) 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 450](#) for more information.
- **Card Vendor Profile** - Edit the Vendor Data for the Card Definition. See [“Edit Card Vendor Data” on page 452](#) for more information.
- **Card Attributes** - Edit the Attributes for the Card. See [“Edit Card Attributes” on page 451](#) 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:

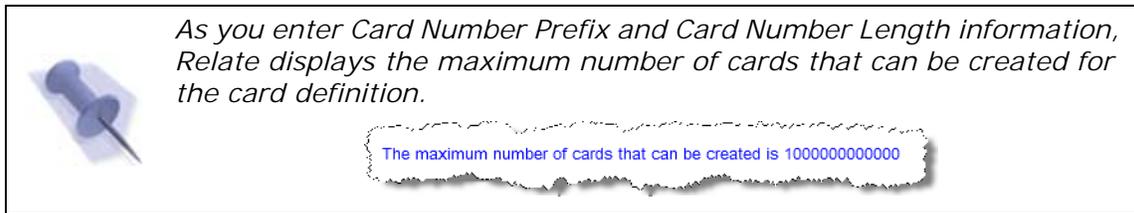
1. In the [Actions Menu](#), click **Card Definition**.

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 (including the Card Prefix).



- ❑ **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.

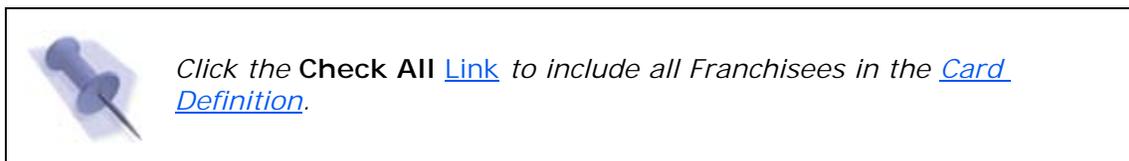
Select	Franchisee ID	Name	Description	Card Administrator
<input checked="" type="checkbox"/>	16	TestUserOrg1	Test User Org 1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	22	TestUserOrg2	User Organization 2	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1618	Highland Road	Highland Road	<input type="checkbox"/>
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>	<input type="checkbox"/>
<input type="checkbox"/>	1612	12113		<input type="checkbox"/>
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall	<input type="checkbox"/>
<input type="checkbox"/>	1617	233		<input type="checkbox"/>
<input type="checkbox"/>	589	45		<input type="checkbox"/>
<input type="checkbox"/>	590	76		<input type="checkbox"/>

Figure 16-11: Franchisees Screen

Edit Franchisees

To modify the Franchisees associated with a [Card Definition](#):

- 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](#).



- 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](#).
- 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.

The maximum number of cards that can be created is 1000000000000

- ❑ **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.

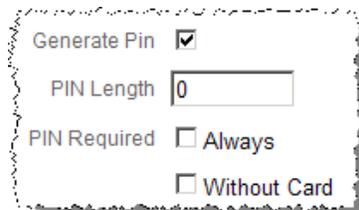


Figure 16-14: Generate Pin [Check Box](#) Checked

- **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.

Select	Franchisee ID	Name	Description	Card Administrator
<input type="checkbox"/>	1618	Highland Road	Highland Road	<input type="checkbox"/>
<input type="checkbox"/>	1	<User & Org "Test", 'Special'>	<User & Org "Test", 'Special'>	<input type="checkbox"/>
<input type="checkbox"/>	1612	12113		<input type="checkbox"/>
<input type="checkbox"/>	91	210 - Red River Mall	Red River Mall	<input type="checkbox"/>
<input type="checkbox"/>	1617	233		<input type="checkbox"/>
<input type="checkbox"/>	589	45		<input type="checkbox"/>
<input type="checkbox"/>	590	76		<input type="checkbox"/>
<input type="checkbox"/>	588	81		<input type="checkbox"/>
<input type="checkbox"/>	1615	abc23 Franchisee		<input type="checkbox"/>
<input type="checkbox"/>	81	CrazyCatzDesigns	Designs for Cat Lovers	<input type="checkbox"/>
<input type="checkbox"/>	82	CrazyCatzShoppe	Shoppe Cat Lovers	<input type="checkbox"/>

Figure 16-17: Franchisees Step

- Select the **Check All Link** to associate the Card Definition with all Franchisees.
 - If only a subset of Franchisees will be associated with the Card Definition, select the **Check Box** for each Franchisee to be included.
 - Select the **Uncheck All Link** 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:

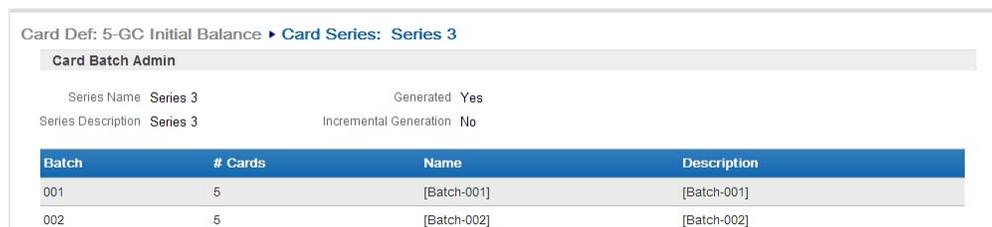
- [“Create New Program” on page 503](#)
- [“Create a Card Series Distribution” on page 460](#)
- [“Edit Card Vendor Data” on page 452](#)

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.



Batch	# Cards	Name	Description
001	5	[Batch-001]	[Batch-001]
002	5	[Batch-002]	[Batch-002]

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.

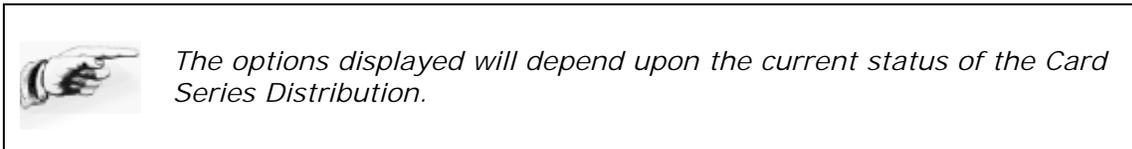
The following information is displayed for each Batch:

- Batch** - The Batch Number.

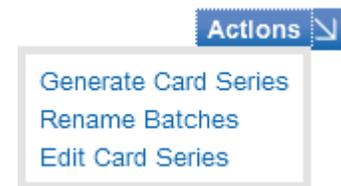
- ❑ **# Cards** - The number of Cards in the Batch.
- ❑ **Name** - Name of the Batch.
- ❑ **Description** - Description of the Batch.

Actions Menu

The [Actions Menu](#) for each Card Series Distribution has the following options:



- **Generate Card Series** - Generate Cards for the Batch (see [“Generate Cards” on page 464](#) for more information).
- **Activate Batches** - Activates Cards by Batch or by Card number range (see [“Activate Cards” on page 464](#)).
- **Edit Card Series** - Edit the Series in the New Card Series Distribution [Wizard](#) (see [“Create a Card Series Distribution” on page 460](#)).
- **Deactivate Batches** - Deactivates Cards by Batch or by Card number range (see [“Deactivate Cards” on page 465](#)).
- **Change Batch Expiry Date** - Changes the expiration date for Cards by Batch or by Card number range (see [“Change Batch Expiration Date” on page 466](#)).
- **Rename Batches** - Changes the name of Card Batches (see [“Rename Card Series Batches” on page 468](#)).



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**.



The New Card Series Distribution [Wizard](#) opens with the Series Definition step.

Figure 16-19: 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.
- Import Card Numbers** - Select the Import Card Numbers [Check Box](#) to import a comma-separated values (CSV) file containing card numbers.
- 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.

Expiration Dates

Start Date

End Date

- 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.

Expiration Dates

Period Type

Number of Periods

- 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.

If the Import Card Numbers [Check Box](#) was selected, the Import Card Numbers step opens.



Figure 16-20: Import Card Numbers Step

- a. Click **Select file to import**.

The Import Card Numbers window opens.

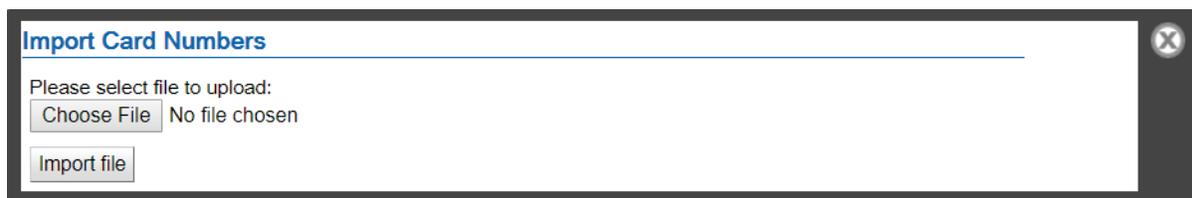


Figure 16-21: Import Card Numbers Window

- b. Use the File Upload (Browse) field to select the CSV file to import.
- c. Click the **Import** button.

- d. The Import CSV Window closes and the card numbers are listed on the screen.

Series Definition **Import Card Numbers** Card / Batches

File to import: CardSeries003.csv
[Select file to import](#)

Selected import file contains 20 lines.

Card Number	Serial Number	PIN	Tender Balance	Loyalty Balance	Award Balance
1234501001000022	2345601001000001		10	100	2
1234501001000023	2345601001000002		10	100	12
1234501001000024	2345601001000003		10	100	12
1234501001000025	2345601001000004		10	100	12
1234501001000026	2345601001000005		10	100	12
1234501001000027	2345601001000006		10	100	12
1234501001000028	2345601001000007		10	100	12
1234501001000029	2345601001000008		10	100	12
1234501001000030	2345601001000009		10	100	12

Figure 16-22: Import Card Numbers Step - Cards Displayed

CSV File Format

When importing external card numbers for a card series, the CSV file listing the numbers must have the following fields for each line:

- CARD_NUMBER [REQUIRED]
- CARD_PIN_NUMBER [OPTIONAL]
- Tender Balance Amount [OPTIONAL]
- Loyalty Balance Amount [OPTIONAL]
- Award Balance Amount [OPTIONAL]

A placeholder must be used for all fields. For example, to include a card number of 1234567890123456 with no PIN, a Tender Balance Amount of 10, a Loyalty Balance Amount of 20, and an Award Balance of 30, the following line would be included in the CSV file:

```
1234567890123456,,10,20,30
```

Note the empty field for the PIN in the example.

CSV file validation:

- The card numbers cannot be duplicates to any cards already in the database.
- The card number prefixes must be valid for the card definition.
- The activation amounts must be valid numbers.

Additional information:

- The card number length does not need to match the length specified for the card definition.

- If an activation amount is provided in the import file, the card will be activated upon creation. If no amounts are provided the card will remain inactive.
 - The activation amounts are in the program's base currency.
4. Click **next** to continue.

The Card/Batches step opens.

Series Definition > **Card / Batches** > Batch Labels > Review

« previous save cancel next »

Define Number of Cards / Batches

Number Of Cards

Number Of Batches

Figure 16-23: Card/Batches Step

5. 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.
6. Click **next** to continue.

The Batch Labels step opens.

Series Definition > Card / Batches > **Batch Labels** > Review

« previous save cancel next »

Define batch labels and descriptions.

Batch	# Cards	Name	Description
001	200	<input type="text" value="[Batch-001]"/>	<input type="text" value="[Batch-001]"/>
002	200	<input type="text" value="[Batch-002]"/>	<input type="text" value="[Batch-002]"/>
003	200	<input type="text" value="[Batch-003]"/>	<input type="text" value="[Batch-003]"/>

Figure 16-24: Batch Labels Step

7. 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.

8. Click **next** to continue.
- The Review step opens.
9. 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 458](#)).
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 595](#) for more information.

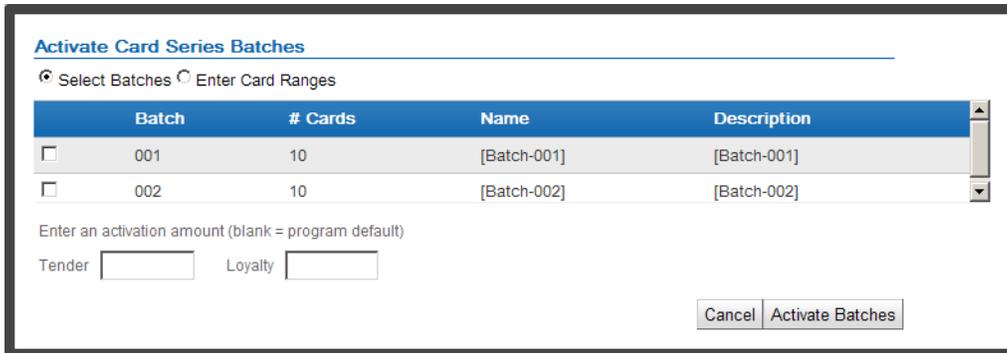
 Job successfully submitted. Please check the process queue.

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 458](#)).
2. Click **Activate Batches** in the [Actions Menu](#).

An Activate Card Series Batches [Window](#) opens.



Activate Card Series Batches

Select Batches Enter Card Ranges

Batch	# Cards	Name	Description
<input type="checkbox"/> 001	10	[Batch-001]	[Batch-001]
<input type="checkbox"/> 002	10	[Batch-002]	[Batch-002]

Enter an activation amount (blank = program default)

Tender Loyalty

Figure 16-25: 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 16-26: 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 458](#)).
2. Click **Deactivate Batches** in the [Actions Menu](#).

An Deactivate Card Series Batches [Window](#) opens.

Figure 16-27: 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 16-28: 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 458](#)).
2. Click **Change Batch Expiry Date** in the [Actions Menu](#).

An Change Batch Expiry Date [Window](#) opens.

Batch	# Cards	Name	Description
<input type="checkbox"/> 001	10	[Batch-001]	[Batch-001]
<input type="checkbox"/> 002	10	[Batch-002]	[Batch-002]

Figure 16-29: 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:

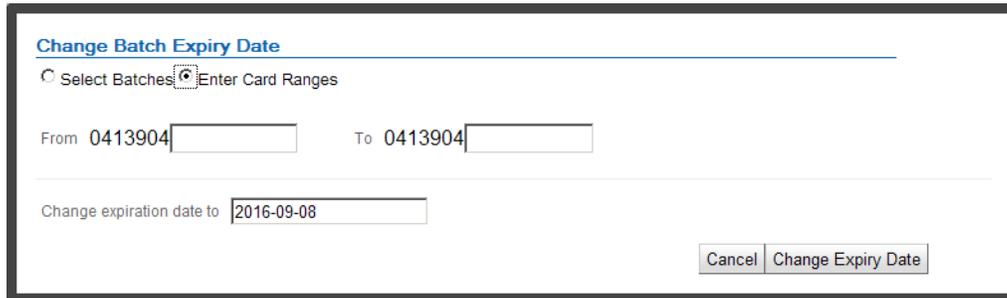


Figure 16-30: Change Batch Expiry Date by Card Range

- 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 458](#)).
2. Click **Rename Batches** in the [Actions Menu](#).

A Rename Card Series Batches [Window](#) opens.

Batch	# Cards	Name	Description
<input type="checkbox"/> 001	10	[Batch-001]	[Batch-001]
<input type="checkbox"/> 002	10	[Batch-002]	[Batch-002]

Rename To Description

Figure 16-31: 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.

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.

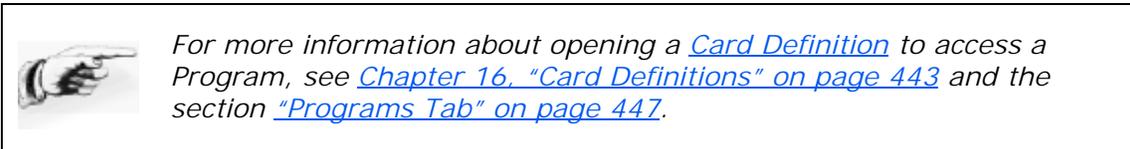
Program Types

Relate has the following types of Programs:

- **Tender Program** - Tender Programs define rules for gift cards (or stored value cards). See [“Tender Program” on page 468](#).
- **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. See [“Award Program” on page 471](#).
- **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. See [“Loyalty Program” on page 473](#).
- **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. See [“Entitlement Program” on page 498](#).

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.



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 468](#)
- [“Award Program” on page 471](#)
- [“Loyalty Program” on page 473](#)
- [“Entitlement Program” on page 498](#)

Tender Program

The following information is displayed for Tender Programs:



Card Def: GC/Loy 0414-1 ▶ Tender Program: GC/Loy 0414-1

General Program Information					
Program Name	GC/Loy 0414-1	Start Date	2011-04-14	Active	Yes
Program Description	GC/Loy 0414-1	End Date	2016-04-14		
Tender Program Details					
Credit Reversal	Yes	Card required	No	Allow Foreign Currency	Yes
Debit Reversal	Yes	Card Merge Permitted	No	Currency	Canada, Dollars
Allow Cash Outs	Yes	Account Level Expiration	Yes	Number of Periods	52
Cash Out Limit	999.00	Period Type	Weeks		
Tender Balances					

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.

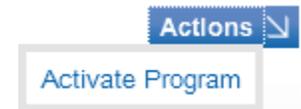
- ❑ **Card Required** - Indicates whether the customer must have the physical card present during the transaction to receive credit for the transaction.
- ❑ **Card Merge Permitted** - Indicates whether the Card can be merged with another Card.
- ❑ **Allow Foreign Currency** - Indicates whether foreign 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 503](#) and ["Create a Tender Program" on page 504](#).

Award Program

The following information is displayed for Award Programs:

Card Def: 1-GC Always Gen Pin ▶ Award Program: ALW Award Program1

General Program Information			
Program Name	ALW Award Program1	Start Date	2011-04-13 Active Yes
Program Description	ALW Award Program1	End Date	2016-04-13
Award Card Parameters			
Card required	Yes	Allow Foreign Currency	Yes
Card Merge Permitted	Yes	Currency	United States of America, Dollars
Award Program Details			
Initial Account Balance	25.00	Account Level Expiration	Yes
Allow Reloads	Yes	Period Type	Quarters
		Number of Periods	0

Figure 17-2: Award Program Screen

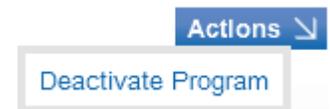
- **General Program Information** - General information about the Program. This includes the following information:
 - Program Name** - Name of the Program.
 - Program Description** - Description of the Program.
 - Start Date** - Date on which the Program starts.
 - End Date** - Date on which the Program 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:

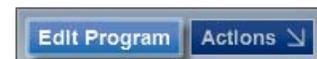
- **Deactivate Program** - Deactivate the Program (only available for active Programs).
- **Activate Program** - Activate the Program (only available for inactive Programs).



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 503](#) and ["Create an Award Program" on page 511](#).

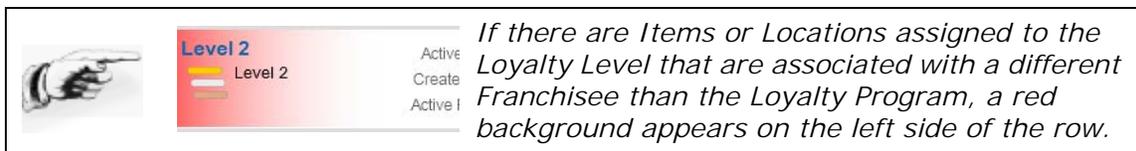
Loyalty Program

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 (that is, 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 Program.



To open a Loyalty Level, click the Loyalty Level in the [Layer List](#).

The following information is displayed for each Level:

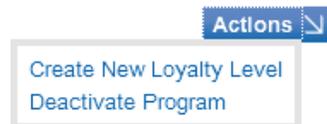
- ❑ **Active Flag** - Indicates whether the Level is currently active.
- ❑ **Create Date** - Date on which the Level was created.
- ❑ **Active Rules** - The number of active rules associated with the Loyalty Level. This includes Issue Rules, Award Rules, and Movement Rules.

- ❑ **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 has the following options:

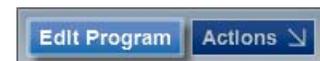
- **Create New Loyalty Level** - Add a new Loyalty Level to the Program.
- **Deactivate Program** - Deactivate the Program (only available for active Programs).X
- **Activate Program** - Activate the Program (only available for inactive Programs).



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 503](#) and [“Create a Loyalty Program” on page 508](#).

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](#).

The screenshot shows the 'Loyalty Level definition' section with the following fields and values:

- Level Name: Loyalty 0414-2
- Description: Loyalty 0414-2
- Points Aging: Reset after x rolling periods (dropdown), Aging Period: Weeks (dropdown), Aging Periods: 52 (text input)
- Loyalty Points Escrow: Escrow Points (checked), Escrow Period: Weeks (dropdown), Escrow Periods: 52 (text input)

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 485](#) for more information.
- **Create New Award Rule** - Creates a new Award Rule. See [“Add Award Rule” on page 492](#) for more information.
- **Create New Movement Rule** - Creates a New Movement Rule. See [“Add Movement Rule” on page 497](#) 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.

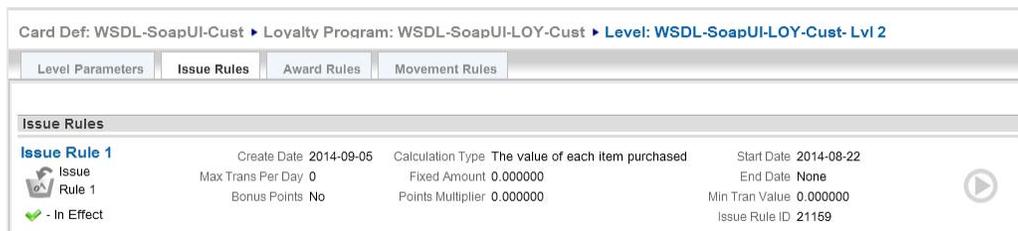
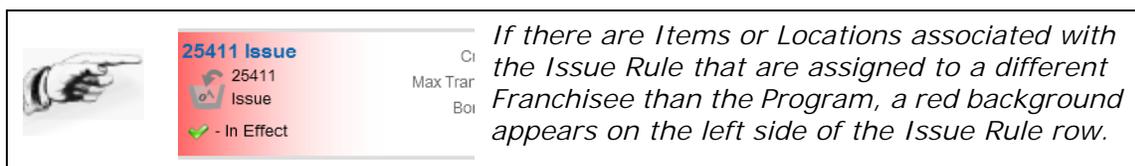


Figure 17-6: Issue Rules Tab



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 their current Loyalty Level to another within the Program.

Movement Periods			
Advance Rule Advance Rule - In Effect	Create Date 2014-09-05 Start Date 2014-08-22 End Date Movement Rule Id 21163	(Move to) Loyalty Program Level WSDL-SoapUI-LOY-Cust- Lvl 2 Movement Rule Type Advancement Test Type Points Earned Since ...	
Demotion Rule Demotion Rule - In Effect	Create Date 2014-09-05 Start Date 2014-08-22 End Date Movement Rule Id 21164	(Move to) Loyalty Program Level WSDL-SoapUI-LOY-Cust Movement Rule Type Demotion Test Type Time Period Since La... Movement Periods 2 Test Period Type Months	

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 476](#) 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 485](#)
 - ❑ [“Add Award Rule” on page 492](#)

- ❑ [“Add Movement Rule” on page 497](#)
 - ❑ [“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](#)
 - ❑ [“Define Tender Eligibility” on page 67](#)
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](#).

The screenshot shows the 'Issue Rule Parameters' tab of the 'Issue Rule' screen. At the top, it displays the breadcrumb: 'Card Def: ALWCard-3 ▶ Loyalty Program: Loyalty 0414-2 ▶ Level: Loyalty 0414-2 ▶ Issue Rule: Loyalty 0414-2'. Below this are 'Cancel' and 'Save' buttons. The main content area is divided into two sections: 'Issue Rule Definition' and 'Issue Rule Point Parameters'.
 In the 'Issue Rule Definition' section, there are input fields for 'Name' (Loyalty 0414-2), 'POS Name' (Loyalty 0414-2), and 'Description' (Loyalty 0414-2). There are also fields for 'Start Date' (2012-04-14), 'Disable End Date' (checked), and 'End Date'.
 In the 'Issue Rule Point Parameters' section, there is a 'Bonus Points' checkbox (unchecked), a 'Calculation Type' dropdown menu (set to 'The value of each item purchased'), a 'Fixed Amount' input field (0), a 'Max Trans Per Day' input field (999), and an 'Include Non-Physical Charges' checkbox (unchecked).

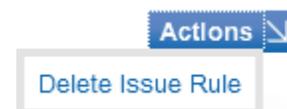
Figure 17-11: Issue Rule Screen

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 489](#) 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.

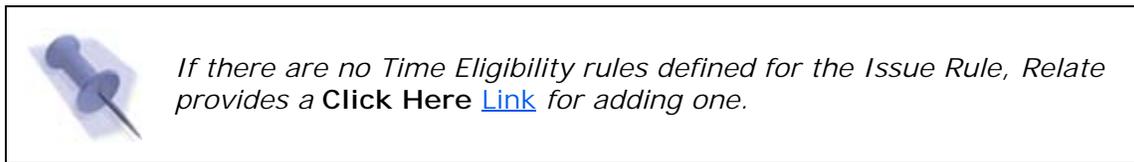
- Start Date** - Date the Issue Rule becomes effective.
- Disable End Date** - If checked () , the End Date configuration will be deactivated, allowing the Issue Rule to be effective forever.
- End Date** - Last date on which the Issue Rule will be effective.
- **Issue Rule Point Parameters** - Determines 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.

Name	Description	Type
Time Rule 1	Time Rule 1	Bonus Period

Figure 17-12: Time Eligibility Tab



- 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.](#)

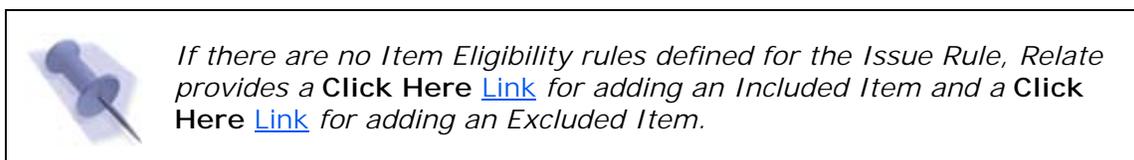
Item Eligibility Tab

The Item Eligibility tab displays a [List](#) of Items and or Attributes for Items that are eligible and/or excluded from the Issue Rule.

Filter	Value	Description
Department	600	Home Furnishings
Department	600	Womens Shoes

Filter	Value	Description
Item Id	230001	SHOE TAN 10.6E

Figure 17-13: Item Eligibility Tab

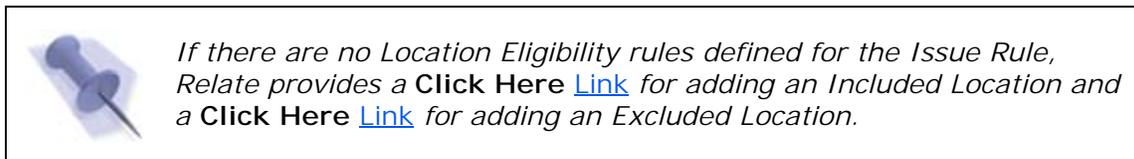


- For more information about Item Eligibility Rules, see [“Item Eligibility” on page 54.](#)
- For instructions on configuring Item Eligibility Rules, see [“Define Item Eligibility” on page 54.](#)

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



- 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.

Name	Description	Customer Count
XST 9.0 Count 321	XST 9.0 Count 321	305
MK Avon OH	MK Avon OH	29
Private Count Open	Private Count Open	1

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.

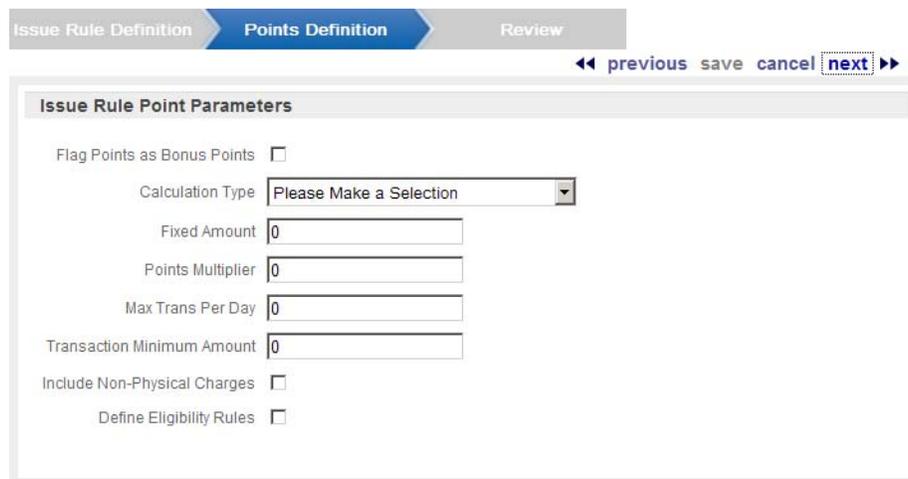


Figure 17-18: Points Definition Step

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.

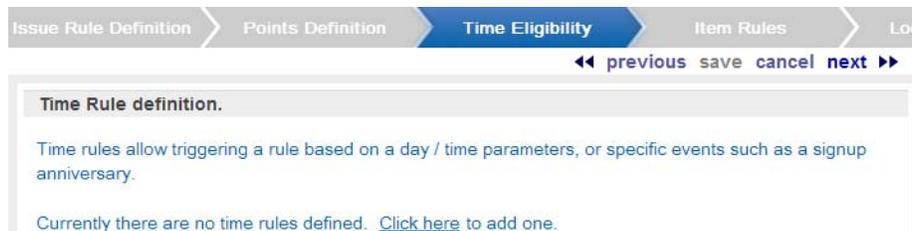


Figure 17-19: Time Eligibility Step

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.

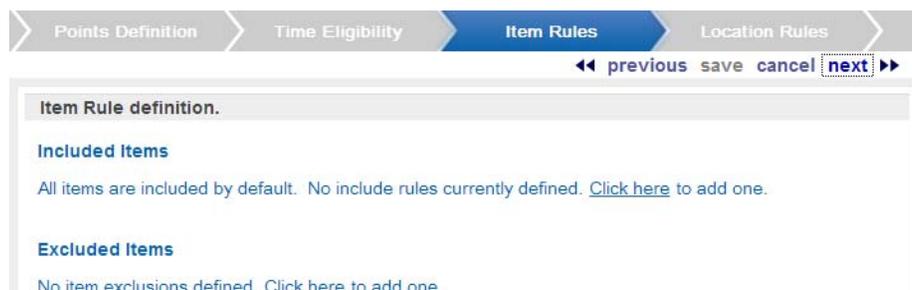


Figure 17-20: Item Rules Step

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.

Tender Types	ID
<input type="checkbox"/> Account Credit	ACCOUNT_CREDIT
<input type="checkbox"/> Accounts Receivable	ACCOUNT_RECEIVABLE
<input type="checkbox"/> American Express cards	AMERICAN_EXPRESS
<input type="checkbox"/> American Express Credit Card	AMERICAN_EXPRESS
<input type="checkbox"/> Canada Cash	CAD_CURRENCY
<input type="checkbox"/> Canadian Traveler Cheque	CAD_TRAVELERS_CHECK
<input type="checkbox"/> Cash	Cash
<input type="checkbox"/> Check	CHECK

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.

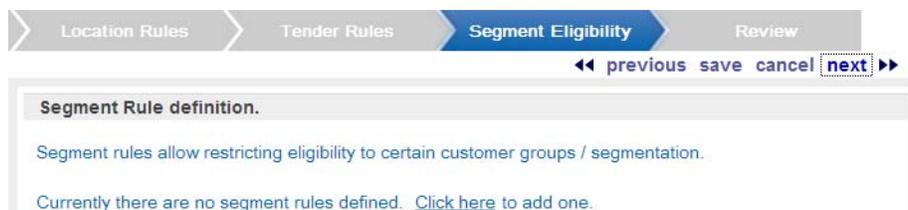


Figure 17-23: Segment Eligibility Step

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 493](#) for more information.



View/Edit Award Rule

To open an Award Rule, click the Award Rule in the [Award Rules Tab](#).

 A screenshot of the 'Award Rule' configuration screen. The page title is 'IM Awards'. There are navigation tabs for 'Programs' (Loyalty: IM Loyalty, Award: IM Awards) and 'Status' (Series Defined: 1, Generated Series: 1, Total Cards: 100 / 100, Active: Yes). The breadcrumb trail is 'Card Def: IM Awards > Loyalty Program: IM Loyalty > Level: IM Loyalty > Award Rule: IM LYL Award Rule'. The main form is divided into sections: 'Award Rule definition' (Name: IM LYL Award Rule, Award Type: Issue E-Award, Issue Immediately Upon Transaction Posting: checked, POS Name: IM LYL Award Rule, Precedence: 0, Description: IM LYL Award Rule), 'Award Rule Effective Dates' (Start Date: 2012-02-08, Disable End Date: checked, End Date: empty), 'E-Award Rule Parameters' (Points Cost Type: Fixed, Award Amount: 5.25, Expiration Period Type: Weeks, Expiration #: 3, Award Program: IM Awards, Coupon Prefix: 22222), and 'Points Cost / Threshold' (Points Cost: 1000, Point Threshold: 1000). There are 'Cancel' and 'Save' buttons at the top right.

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.
- Issue Immediately Upon Transaction Posting** - This [Check Box](#) determines whether the award will be issued to the customer immediately upon the transaction posting. *This field only appears for an Award Type of Issue E-Award.*
- **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 490](#) 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.

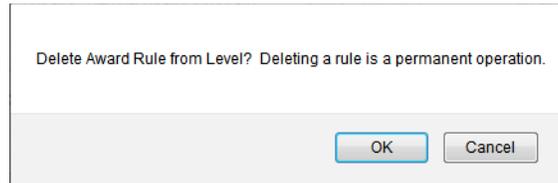


Figure 17-27: Confirmation Prompt

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 497 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.
 - Issue Immediately Upon Transaction Posting** - This [Check Box](#) determines whether the level change will occur immediately upon the transaction posting.
- **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 496](#) 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:

Extend sustain period if customer meets the following criteria:

Extension Test Type

Extension Test Periods

Test Period Type

Point Threshold

Extension Periods

Extension Period Type

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 494](#) 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:

Card Def: Loyalty0Decimals ▶ Entitlement Program: test					
Program Type	Entitlement	Effective Date	2014-07-14	Account Level Expiration	No
Program Description	test	Expiration	None	Period Type	-
Active	Yes			Number of Periods	-
Entitlement Deals					
*default					
SeaWorld-10% Merchandise Discount	Deal ID 9581	Unlimited Redemption	No	Create Date	2014-07-14
SeaWorld-10% Merchandise Discount	Priority 1	Maximum Redeemable Count	100.00		
SeaWorld-FreeRental	Deal ID 9582	Unlimited Redemption	No	Create Date	2014-07-14
SeaWorld-FreeRental	Priority 1	Maximum Redeemable Count	100.00		

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



This [Actions Menu](#) is only available for Card Definitions for which no Cards have been generated.

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.

Name	Description	Type
Afternoon	Afternoon	Enabled

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.

Location Attribute	Value
ADDITIONAL-DEPARTMENTS	ALL_STORES

Location Attribute	Value
ADDITIONAL-DEPARTMENTS	Bakery

Figure 17-36: Location Eligibility Tab



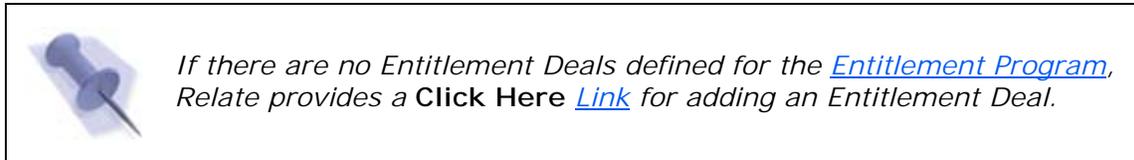
*If there are no Location Eligibility rules defined for the Entitlement Deal, Relate provides a **Click Here** [Link](#) for adding an Included Location and a **Click Here** [Link](#) for adding an Excluded Location.*

- 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 499](#)).



A blank [Entitlement Deal Parameters Tab](#) opens.

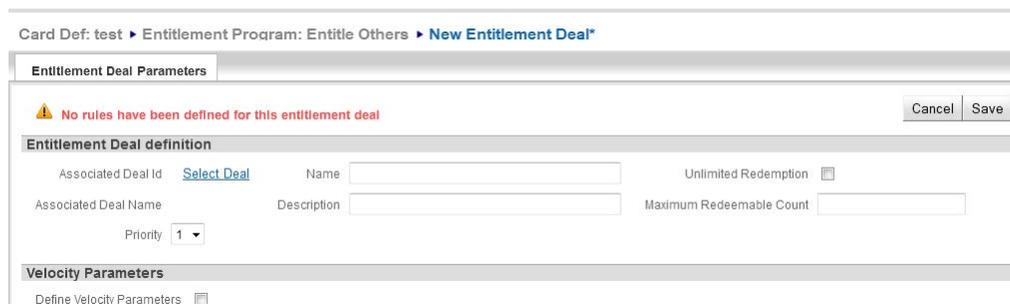


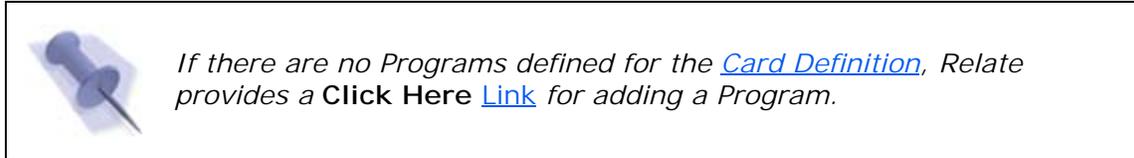
Figure 17-37: Blank Entitlement Deal Parameters Tab

2. Enter the information for the Entitlement Deal. See [“Entitlement Deal Parameters Tab” on page 500](#) 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 449](#)).



The Program Creation [Wizard](#) opens with the Program Type step.

The screenshot shows the 'Program Type' step of the wizard. The sidebar on the left has 'Program Type' selected, with 'Select A Program Type' and 'Review' as sub-options. The main content area is titled 'Select A Program Type' and contains four radio button options:

- Tender Program**: Tender Programs represent a specific corporate liability with intrinsic value that can be exchanged for merchandise.
- Award Program**: Award Programs contain E-Awards that have a specific dollar value. E-Awards can be created from events such as Loyalty Program point conversion or Birthday / Anniversary rules.
- Loyalty Program**: Loyalty Programs accumulate points by tracking customer purchase activity. Points can be converted to future coupons or E-Awards.
- Entitlement Program**: Entitlement Programs control and limit access to deals. Deals represent promotional pricing on specified products. Deals are defined using the Deal Management module. Deals managed by the entitlement program are published through the Promotion Management module.

Figure 17-38: Create Program Wizard

2. Using the [Radio Buttons](#), select the type of Program you are creating (see [“Program Types” on page 467](#) for a description of each Type).
3. Click **next** to continue.

The General step opens.

The screenshot shows the 'General' step of the wizard. The progress bar at the top indicates the current step is 'General'. The main content area is titled 'General Program Information' and contains the following fields:

- Program Name:
- Program Description:
- Start Date:
- Disable End Date:
- End Date:
- Active:

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 504](#).
 - Loyalty Program** - Continue with ["Create a Loyalty Program" on page 508](#).
 - Award Program** - Continue with ["Create an Award Program" on page 511](#).
 - Entitlement Program** - Continue with ["Create an Entitlement Program" on page 513](#).

Create a Tender Program

To create a Tender Program:

1. Perform the steps described in ["Create New Program" on page 503](#).

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 503](#).

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 480.](#)

- ❑ **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.

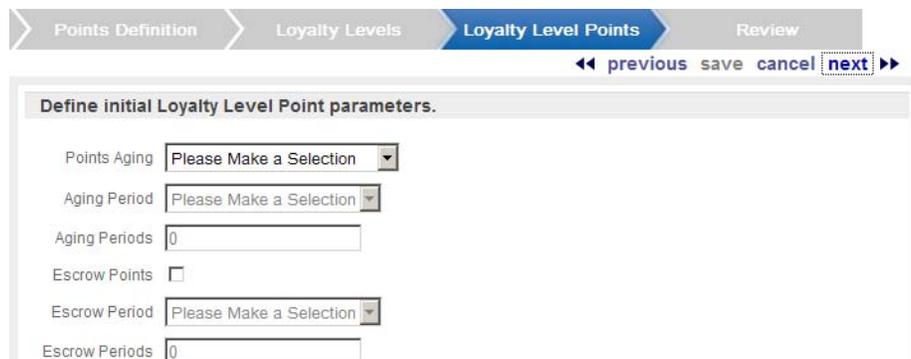


Figure 17-48: Loyalty Level Points Step

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 defined 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 480](#) 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 480](#) and [“Add Movement Rule” on page 497](#).
 - [“Add Issue Rule” on page 485](#)
 - [“Add Award Rule” on page 492](#)

Create an Award Program

To create an Award Program:

1. Perform the steps described in [“Create New Program” on page 503](#).

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 503](#).

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. Create the Entitlement Deal(s) for the [Entitlement Program](#). See [“Create Entitlement Deal” on page 502](#).

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 516](#) - Describes the procedure for searching for a Card and its associated Account(s).
- [“Card/Account Administration” on page 517](#) - 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.

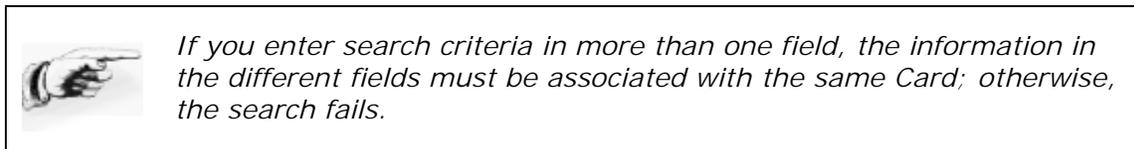
To perform a Card/Account search:

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.



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.

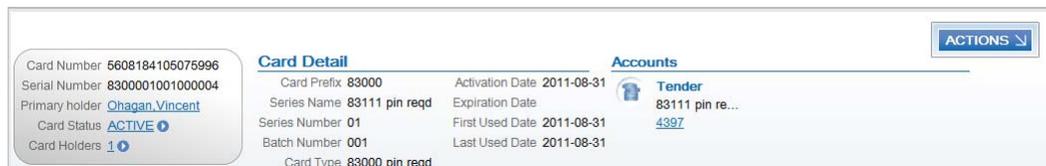


Figure 18-4: Basic Card/Account Information

This area displays the following information:

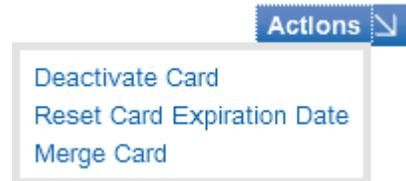
- **Card Information** - Basic information about the Card. This includes the following information:
 - ❑ **Card Number** - Card Number for the Card.
 - ❑ **Serial Number** - Serial Number for the Card.
 - ❑ **Primary holder** - Name of Customer designated as the primary holder of the Card.
 - ❑ **Card 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 519](#).
- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See [“Deactivate Card” on page 520](#).
- **Reset Card Expiration Date** - Set a new expiration date for the card. See [“Set New Card Expiration Date” on page 521](#).
- **Merge Card** - Merge the Card with another Card. See [“Merge Card” on page 522](#).
- 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 519](#)
- [“Using the Card Status Link” on page 519](#)

Through the Actions Menu

1. Click **Activate Card** in the [Actions Menu](#).
A Perform Action: Activate Card [Window](#) opens.

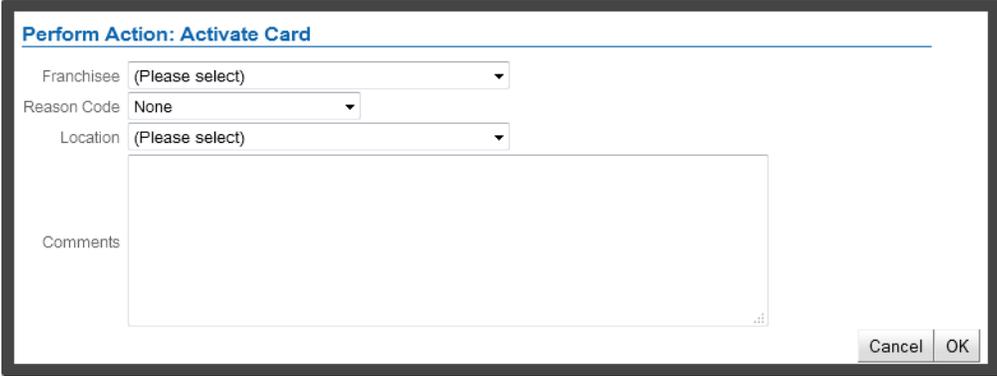


Figure 18-5: Perform Action: Activate Card Window

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

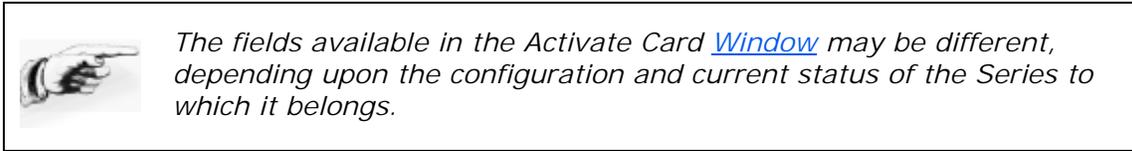
1. Click the **Inactive** Card Status [Link](#) to open the Card Status menu.



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:



- 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 520](#)
- [“Using the Card Status Link” on page 521](#)

Through the Actions Menu

1. Click **Deactivate Card** in the [Actions Menu](#).

A Perform Action: Deactivate Card [Window](#) opens.

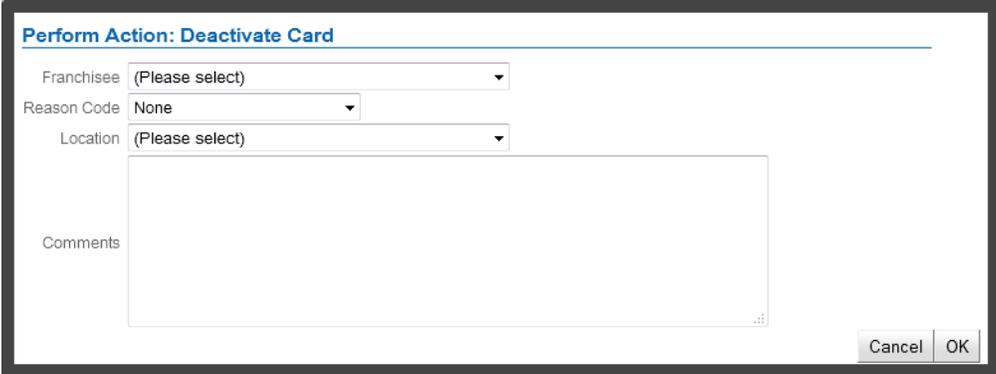


Figure 18-7: Perform Action: Deactivate Card Window

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.

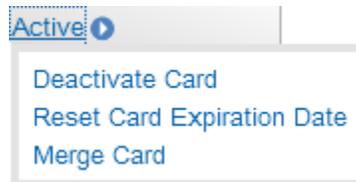


Figure 18-8: Card Status Menu

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](#), or in the [Card Status 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.

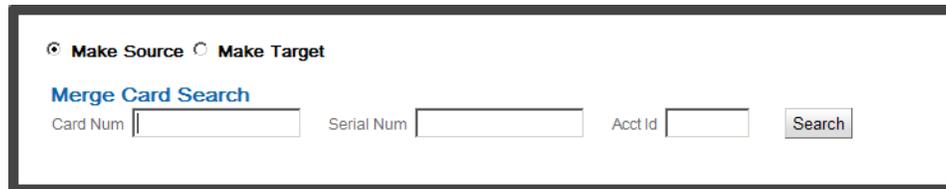
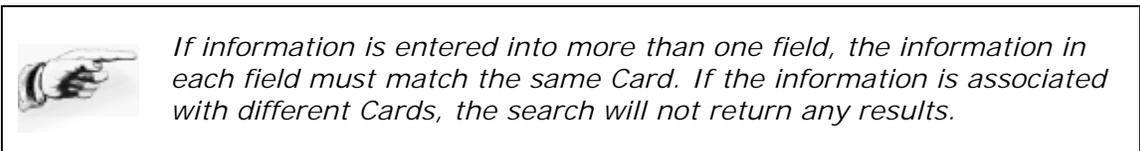


Figure 18-10: Merge Card Window

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.



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:

Activity Id	Location Id	Activity Type	Amount	Activity Date/Time	Void Flag
15477	44087	Activate Card	0.00	2013 Jun 19 16:28:26	
5137	100	Un-Block	0.00	2012 Jun 5 19:49:53	

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.

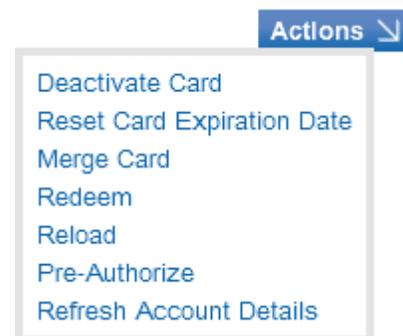
Filter Activity Menu

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 519](#).
- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See [“Deactivate Card” on page 520](#).
- **Reset Card Expiration Date** - Set a new expiration date for the card. See [“Set New Card Expiration Date” on page 521](#).
- **Merge Card** - Merge the Card with another Card. See [“Merge Card” on page 522](#).
- **Redeem** - Redeem an existing amount from the balance on the Card. See [“Redeem an Amount” on page 525](#).
- **Reload** - Reload the Card with an additional amount. See [“Reload a Card” on page 526](#).
- **Pre-Authorize** - Pre-authorize an amount on the Card. See [“Pre-Authorize an Amount” on page 527](#).
- **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.

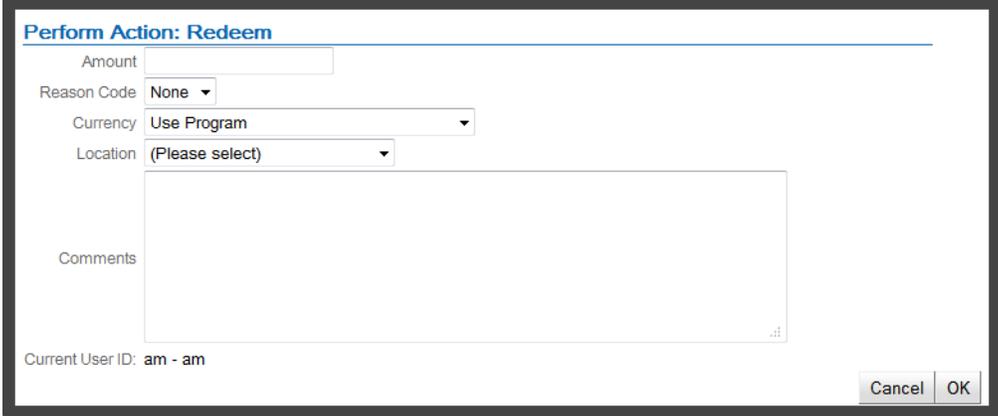


Figure 18-12: Perform Action: Redeem Window

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.

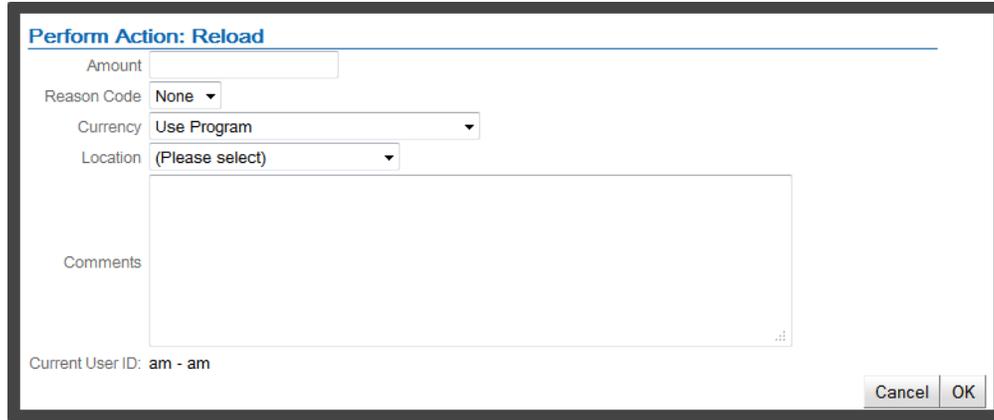


Figure 18-13: Perform Action: Reload Window

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.

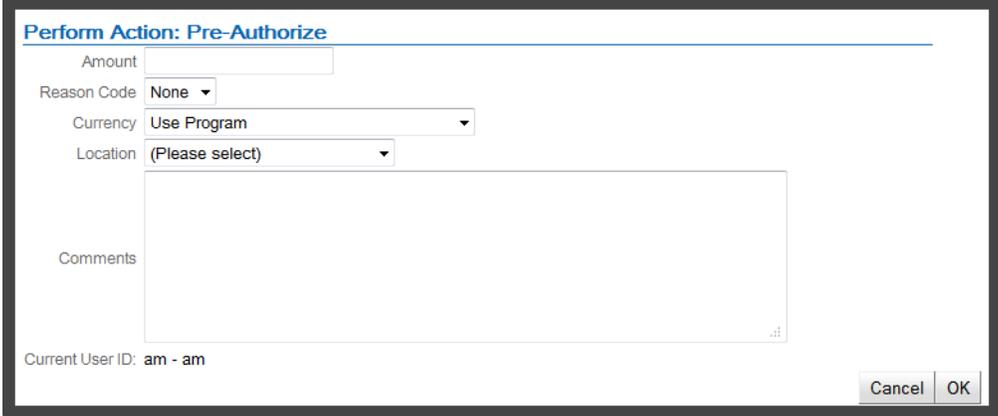


Figure 18-14: Perform Action: Pre-Authorize Window

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](#).

Activity Detail

Account Id	1610	Referenced Activity Id	0
Activity Id	700	Referenced Auth Code	
Activity Type	Activate Card	Merged From Account	0
Activity Date/Time	2013-03-21T14:50:44.000-04:00	Location Id	99999
Auth Code	000000700000005	Location Name	test
Amount	50.00	Business Date	2013-03-21
Currency	USD	Retail Tran Seq	0
Exchange Rate	1	Workstation Id	0
Requested Amount	50.00	Operator Id	Is
Requested Currency	USD	Retail Tran Id	9999900000201303210000000
Void Flag	No	Create Date	2013-03-21T14:50:44.000-04:00
Error Description		Create User Id	Is
Franchisee		Update Date	
Reason Code		Update User Id	

Comments

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 530](#)).
- **Reverse** - Reverses the open activity (see [“Reverse an Activity” on page 531](#)).



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.

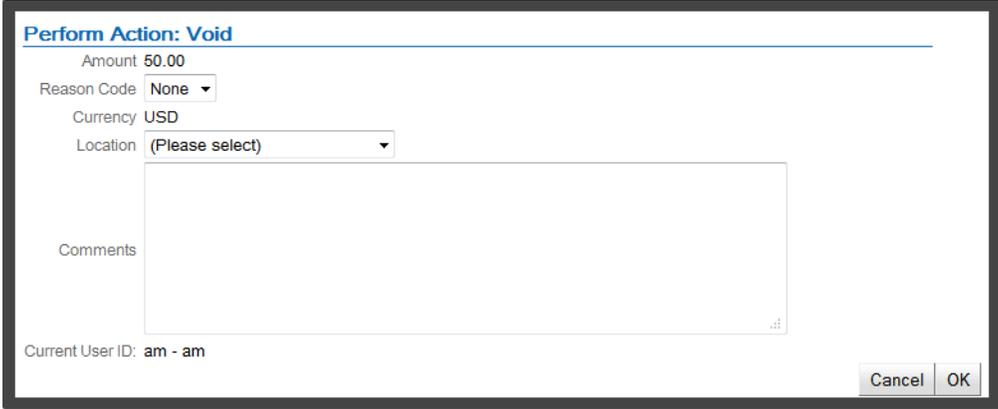


Figure 18-16: Perform Action: Void Window

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.

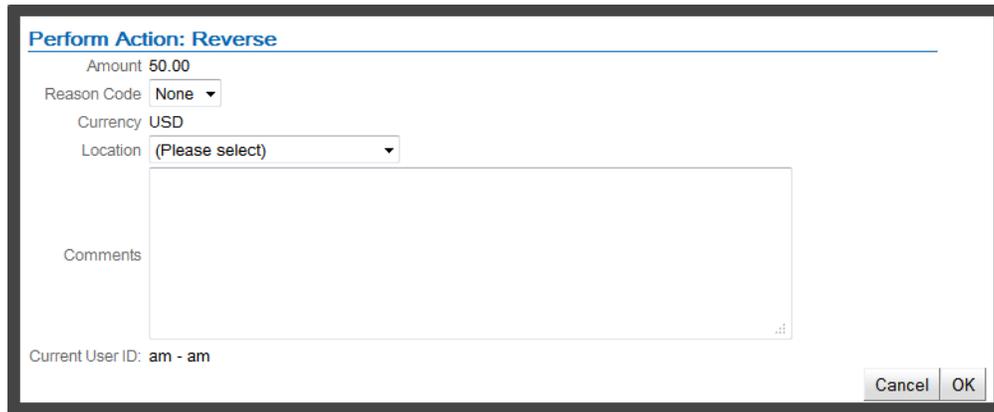


Figure 18-17: Perform Action: Reverse Window

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:

Award Account Administration							
Account Id	9844	Program Name	WSDL-SoapUI-AWD-Cust	Last Used Date	2013-07-01		
Balance	25.00	First Used Date	2011-01-13	Expiration Date			
Award Account Activity							
Filter Activity:	All						
Displaying: 1-2 of 2		1 of 1 Pages		Go To Page:	GO	Page Size:	50 items
Awd Tran Id	Act Seq	Location Id	Activity Type	Coupon Id	Amount	Activity Date/Time	Void Flag
S30158	0	99901	Issue Coupon	00000000000701000000000009387	25.00	2013 Jul 1 09:56:45	
S30157	0	99901	Activate		0.00	2013 Jul 1 09:56:45	

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 Administration

Account Id 10060	Program Name ProgramC
Balance 500	First Used Date 2013-06-2
* Account has been merged	

Award Account Activity

- **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.

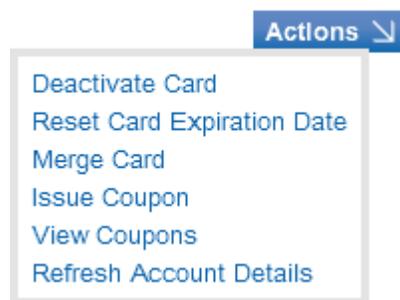
Filter Activity Menu

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 519](#).
- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See [“Deactivate Card” on page 520](#).
- **Reset Card Expiration Date** - Set a new expiration date for the card. See [“Set New Card Expiration Date” on page 521](#).
- **Merge Card** - Merge the Card with another Card. See [“Merge Card” on page 522](#).
- **Issue Coupon** - Issue a Coupon to the Customer. See [“Issue a Coupon” on page 533](#).
- **View Coupons** - View the Coupons that have been issued by the Award Account to the Customer. See [“View Coupons” on page 534](#).
- **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.

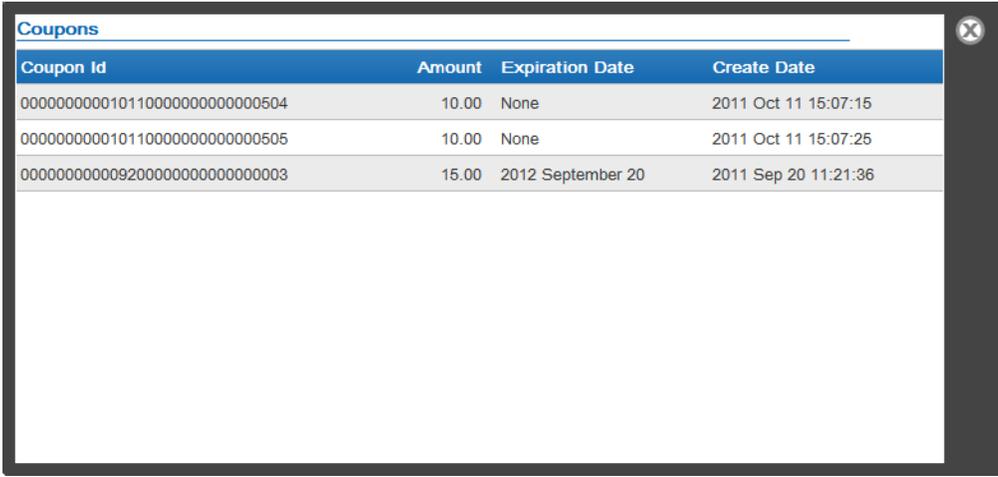
Figure 18-19: Issue Coupon Window

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.



Coupon Id	Amount	Expiration Date	Create Date
00000000001011000000000000000504	10.00	None	2011 Oct 11 15:07:15
00000000001011000000000000000505	10.00	None	2011 Oct 11 15:07:25
00000000000920000000000000000003	15.00	2012 September 20	2011 Sep 20 11:21:36

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](#).

The screenshot shows a window titled "Activity Detail" with a dark border and a title bar containing an "Actions" dropdown and window control buttons. The main content area is divided into two columns of text. The left column contains fields such as Account Id (1612), Awd Tran Id (S3531), Act Seq (0), Coupon Id (000000000003210000000000001648), Activity Type (Issue Coupon), Activity Date/Time (2013-03-21T14:50:45.000-04:00), Amount (25.00), Exchange Rate (1), Requested Amount (25.00), Requested Currency (USD), Void Flag (No), Error Description, Reason Code, and Effective Date. The right column contains fields such as Referenced Activity Id, Merged From Account (0), Location Id (99999), Location Name (test), Franchisee, Business Date (2013-03-21), Retail Tran Seq (0), Workstation Id (0), Retail Tran Id (99999000002013032100000000), Operator Id (Is), Create Date (2013-03-21T14:50:45.000-04:00), Create User Id (Is), Update Date, Update User Id, and Expiration Date. At the bottom left, there is a "Comments" label next to a large empty text area.

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 536](#)).



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.

 A screenshot of a 'Perform Action: Void' dialog box. The window title is 'Perform Action: Void'. It contains several fields: 'Reason Code' with a dropdown menu set to 'None', 'Location' with a dropdown menu set to '99999', and 'Activity Date/Time' with the value '2012-05-10T16:03:21.524-04:00'. Below these is a large text area for 'Comments'. At the bottom left, it says 'Current User ID: am - am'. At the bottom right, there are 'Cancel' and 'OK' buttons.

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:

The screenshot displays the 'Loyalty Account Administration' page. At the top, it shows account details for Account Id 1487, Program Name 2011 Loyalty - LOY, and Loyalty Program Level 2011 LOY Test Level 1. It also lists Escrow Points (0), Earned Points (71), Year To Date Points (71), Lifetime Points (71), Program Currency (USD), First Activity Date (2011-03-15), Last Used Date (2011-03-15), and an Expiration Date field. Below this is a 'Loyalty Account Activity' section with a filter dropdown set to 'All'. A table shows 2 activities (1-2 of 2) with columns for Activity Id, Location Id, Activity Type, Amount, Activity Date/Time, and Void Flag. The table contains three rows of data.

Activity Id	Location Id	Activity Type	Amount	Activity Date/Time	Void Flag
79	110	Issue	31	2011 Mar 15 14:08:35	
78	110	Issue	40	2011 Mar 15 14:08:35	
13	99999	Activate	0	2011 Mar 15 12:08:14	

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 Administration

Account Id 10059

Program Name ProgramCurrency.JPY

Loyalty Program Level ProgramCurrency.JPY

*** Account has been merged**

Loyalty Account Activity

- **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.

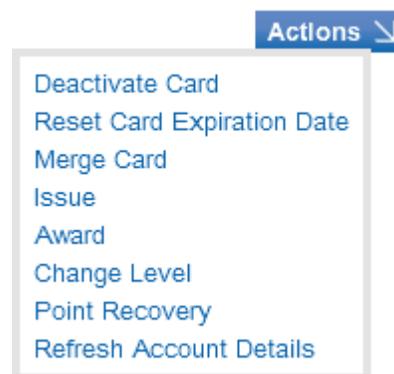
Filter Activity Menu

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 519](#).
- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See ["Deactivate Card" on page 520](#).
- **Reset Card Expiration Date** - Set a new expiration date for the card. See ["Set New Card Expiration Date" on page 521](#).
- **Merge Card** - Merge the Card with another Card. See ["Merge Card" on page 522](#).
- **Issue** - Issue points to a Loyalty Account. See ["Issue Points" on page 539](#).
- **Award** - Issue an award to a Customer. See ["Issue an Award" on page 540](#).



- **Change Level** - Change the Loyalty Level of the Loyalty Account. See [“Change Level” on page 541](#).
- **Point Recovery** - Issue points that were not issued to a Customer in a previous transaction. See [“Recover Points” on page 542](#).
- **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.

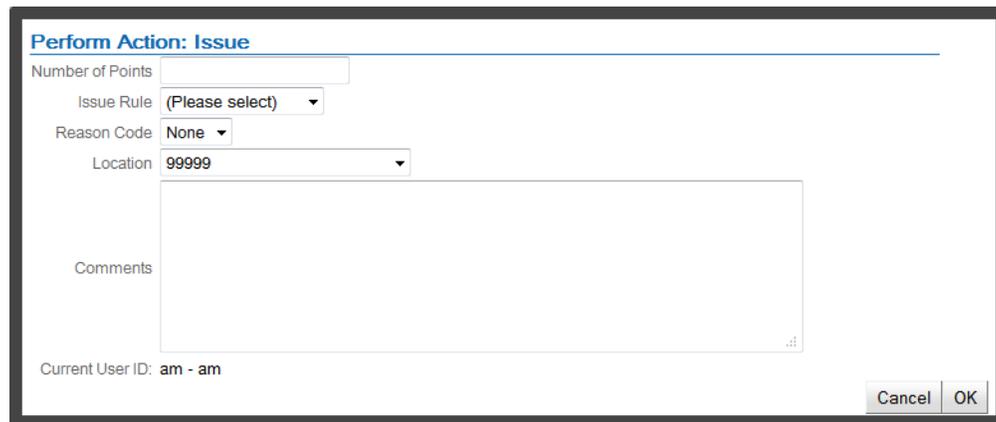


Figure 18-24: Perform Action: Issue Window

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.

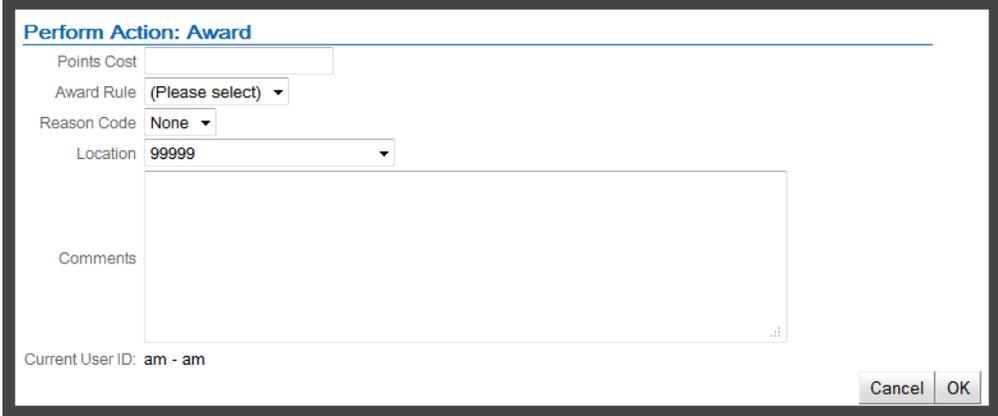


Figure 18-25: Perform Action: Award Window

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.

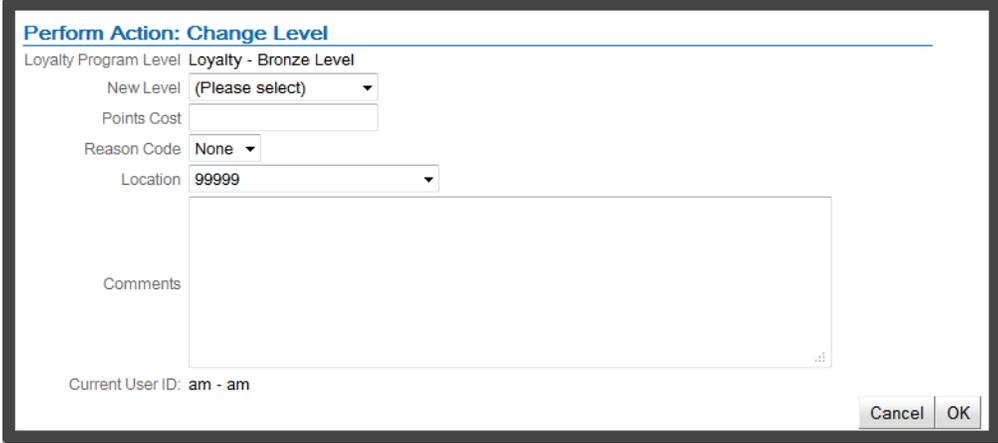


Figure 18-26: Perform Action: Change Level Window

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](#).

Activity Detail

Account Id	1611	Referenced Activity Id	0
Activity Id	2666	Referenced Account Id	0
Activity Type	Activate	Merged From Account	0
Activity Date/Time	2013-03-21T14:50:44.000-04:00	Location Id	99999
Number of Points	0.00	Location Name	test
Requested Currency		Business Date	2013-03-21
Requested Amount		Retail Tran Seq	0
Converted Amount		Workstation Id	0
Exchange Rate		Retail Tran Id	99999000002013032100000000
Loyalty Rule Name		Create Date	2013-03-21T14:50:44.000-04:00
		Create User Id	Is
Pending Pts. Balance	0.00	Update Date	
Earned Pts. Balance	0.00	Update User Id	
Void Flag	No	Error Description	
Customer Id	5463	Franchisee	
		Reason Code	

Comments

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:

Entitlement Account Administration

Account Id 42399 First Used Date 2014-07-15
 Program Name Entitlement/Loyalty Last Used Date 2014-07-21
 Expiration Date

Entitlements	Max	Count	Redeemed
SeaWorld-Rides	Yes	100.00/25.00(v)	0.00
SeaWorld-FreeRental	No	10.00(v)	21.00

Entitlement Account Activity

Filter Activity: All Entitlement Deal: All

Displaying: 1-23 of 23 1 of 1 Pages Go To Page: [GO] Page Size: 50 items

Activity Id	Location Id	Activity Type	Deal Name	Quantity	Activity Date/Time
6570	55003	Activate		0.00	2014 Jul 21 14:00:33
6072	99001	Deactivate		0.00	2014 Jul 21 13:59:55
5570	99901	Inquiry		0.00	2014 Jul 21 13:49:14
6071		Inquiry		0.00	2014 Jul 21 13:48:28
4566	2	Redeem	SeaWorld-FreeRental	1.00	2014 Jul 16 20:38:53
4565	2	Redeem	SeaWorld-FreeRental	2.00	2014 Jul 16 20:38:53
6598	2	Redeem	SeaWorld-FreeRental	1.00	2014 Jul 16 20:38:53

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

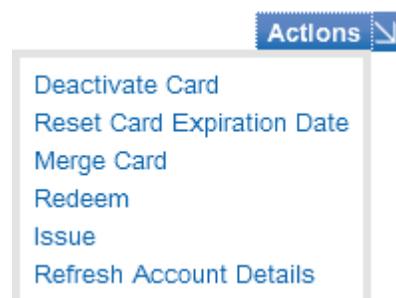
The Entitlement Account Activity [List](#) has the following [Filter](#) menus:

- **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 519](#).
- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See [“Deactivate Card” on page 520](#).
- **Reset Card Expiration Date** - Set a new expiration date for the card. See [“Set New Card Expiration Date” on page 521](#).
- **Merge Card** - Merge the Card with another Card. See [“Merge Card” on page 522](#).
- **Redeem** - Redeem an Entitlement Deal. See [“Redeem an Entitlement” on page 547](#).
- **Issue** - Issue an Entitlement to a Customer. See [“Issue an Entitlement” on page 548](#).
- **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.

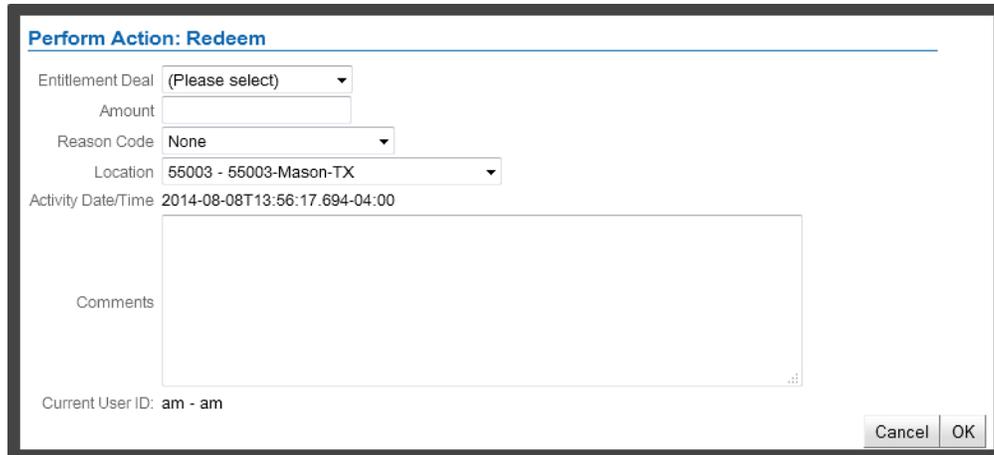


Figure 18-31: Perform Action: Redeem Window

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.

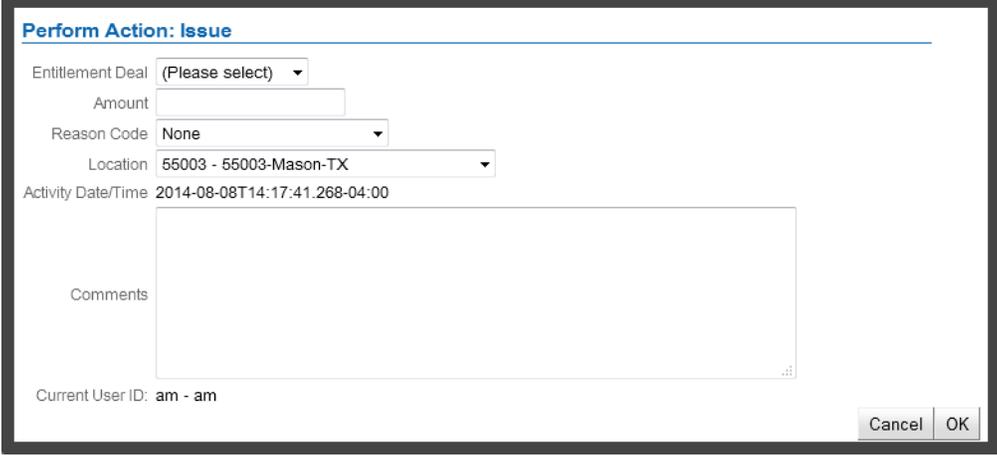


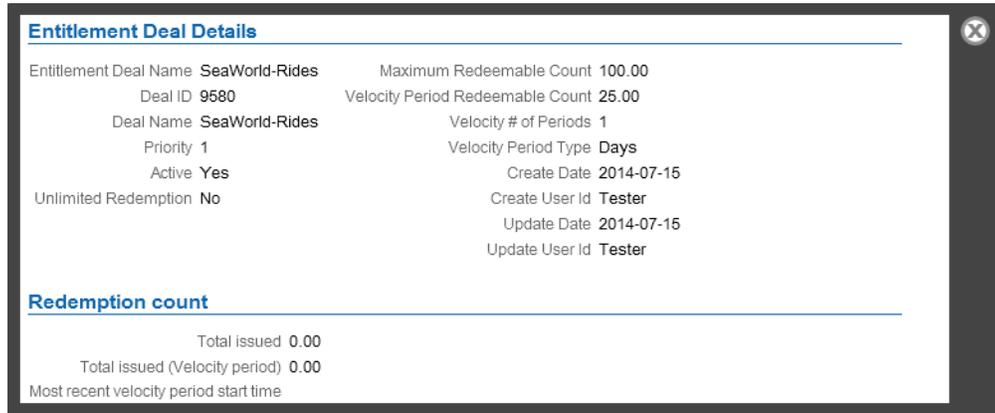
Figure 18-32: Perform Action: Issue Window

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](#).



The screenshot shows a window titled "Entitlement Deal Details" with a close button (X) in the top right corner. The window contains two sections: "Entitlement Deal Details" and "Redemption count".

Entitlement Deal Name	SeaWorld-Rides	Maximum Redeemable Count	100.00
Deal ID	9580	Velocity Period Redeemable Count	25.00
Deal Name	SeaWorld-Rides	Velocity # of Periods	1
Priority	1	Velocity Period Type	Days
Active	Yes	Create Date	2014-07-15
Unlimited Redemption	No	Create User Id	Tester
		Update Date	2014-07-15
		Update User Id	Tester

Redemption count	
Total issued	0.00
Total issued (Velocity period)	0.00
Most recent velocity period start time	

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](#).

Activity Detail

Account Id 42399	Merged From Account 0
Activity Id 4567	Location Id 99001
Activity Type Redeem	Location Name 99001-LasVegas-NV
Activity Date/Time 2014-07-03T00:48:53.000-04:00	Business Date 2014-07-02
Item Id 4545454545	Retail Tran Seq 251016
Deal ID 9582	Workstation Id 2
Quantity 1.00	Retail Tran Id 99001000022014070200251016
Balance 0.00	Operator Id
Velocity balance 6.00	Create Date 2014-07-15T10:55:17.583-04:00
Over Redemption No	Create User Id POS
Error Description	Update Date
Reason Code	Update User Id

Comments

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.

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 554](#) - Provides the procedure for searching for a Location.
- [“Location List” on page 555](#) - Describes the Location List page and the functionality available within it.
- [“Location Window” on page 556](#) - Describes the Location Window and its functionality.
- [“Location Dashboard” on page 558](#) - Describes the Location Dashboard and its functions.
- [“Edit Location Data” on page 560](#) - Describes the methods for editing information about a Location.
- [“Edit Location Attributes” on page 561](#) - Describes the methods for creating, updating, and deleting Attributes assigned to a Location.
- [“Create a Location” on page 563](#) - 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.

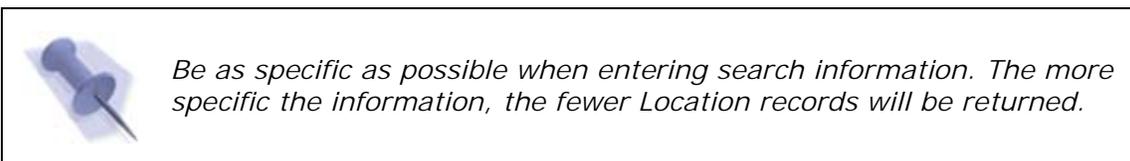
Use the **Admin->Location** menu option, or click the **Location Definition** [Link](#) on the [Main Page](#) to open the [Location Search](#) page.

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.



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](#).

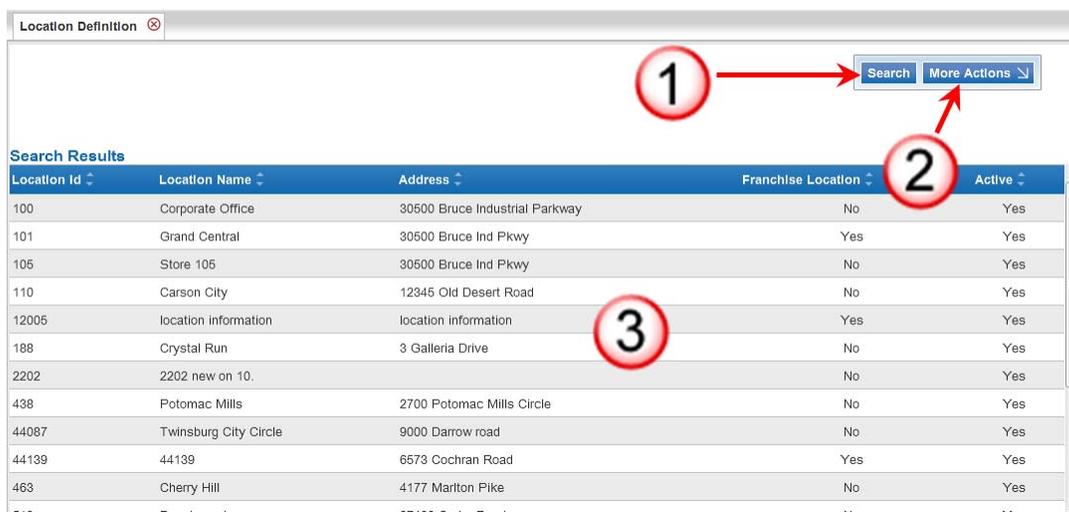


Figure 19-2: Location List

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 554 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 556 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 563](#).



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 560.



Location Dashboard

The Location Dashboard allows a user to view all information about a Location.

Location Information

Location Name **WSDL TestCase 1.0 Store 12101**

Location Id **12101** Create Date **2014-08-14** Update Date **2014-09-05**

Store Number **12101** Create User Id **WSDL-CreateUser2.0** Update User Id **Tester1**

Location Data

[Edit](#)

Location Id 12101 Store Number 12101

Location Name **WSDL TestCase 1.0 Store 12101** E-Mail Address **WSDL-TestCase1.0-Store12101@dodgit.com**

Active **Yes**

Address Line 1 **10001 East 30th Street** State **NC**

Address Line 2 **East 30th Street Mall** Postal Code **43252**

Address Line 3 **P.O. Box 10001** County **Wakes**

Address Line 4 **Suite 10001** Country **US**

City **Wakesburg** Franchisee **210 - Red River Mall**

Location Attributes

[Edit](#)

ADDITIONAL-SERVICES **Gift Wrap**

INTERNET-SALES? **TRUE**

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 560](#) for more information.
- **Attributes** - Edit Attribute information for the Location. See ["Edit Location Attributes" on page 561](#) 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.

Attributes				
Name	Value	Data Type	Unique	Description
ADDITIONAL-SERVICES	Alterations	Character	No	Special Services Offered by Store
ADDITIONAL-SERVICES	Delivery	Character	No	Special Services Offered by Store
GRAND-OPENING-DATE	1992-06-15	Date	Yes	Grand Opening Date for Location
ADDITIONAL-DEPARTMENTS	Liquor	Enumerated	No	Additional Store Departments
ADDITIONAL-DEPARTMENTS	Bakery	Enumerated	No	Additional Store Departments

Figure 19-6: Edit Location Attributes Screen

2. Perform the necessary procedure(s):
 - ❑ ["Update an Attribute" on page 561](#)
 - ❑ ["Add an Attribute" on page 562](#)
 - ❑ ["Delete an Attribute" on page 563](#)

Update an Attribute

1. Click the Attribute to update.

The Attribute opens in an Attribute Detail [Window](#).

The screenshot shows a window titled "Attribute Detail" with the following fields and values:

- Name: District
- Description: District
- Data Type: Character
- Unique: No
- Value: 037 CINCINNATI

At the bottom right of the window are "Save" and "Delete" buttons.

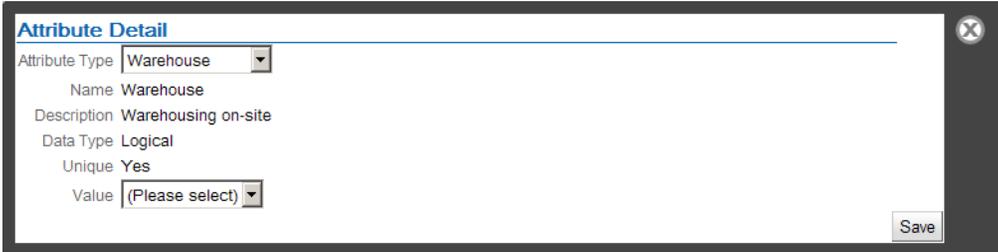
Figure 19-7: Attribute Detail Window

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.



The screenshot shows a window titled "Attribute Detail" with a close button (X) in the top right corner. The window contains the following fields:

- Attribute Type: Warehouse (dropdown menu)
- Name: Warehouse
- Description: Warehousing on-site
- Data Type: Logical
- Unique: Yes
- Value: (Please select) (dropdown menu)

A "Save" button is located in the bottom right corner of the window.

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 561](#) for a description of the procedure.

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 566](#) - 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](#).

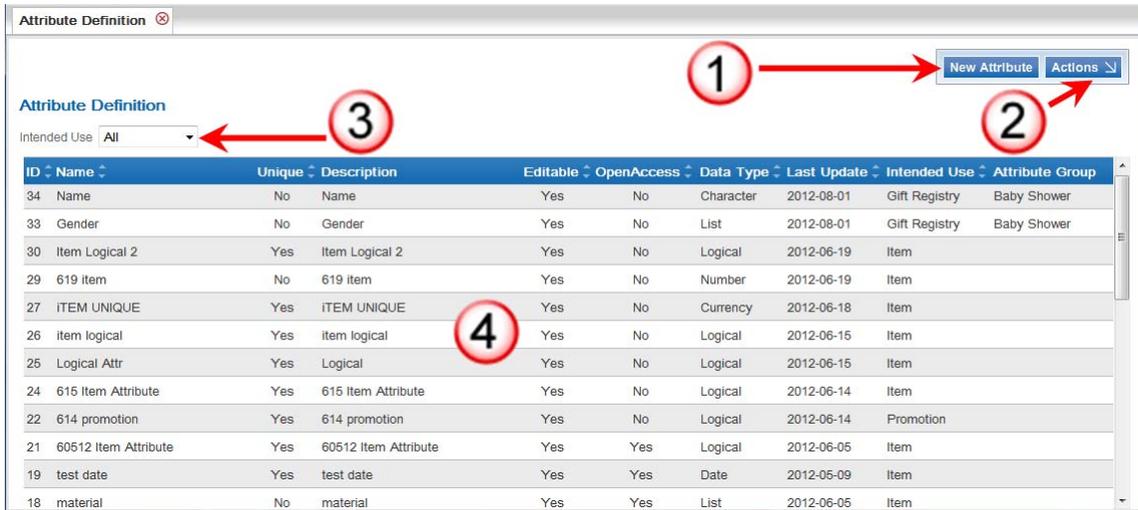


Figure 20-1: Attribute List

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 571 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 567 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 567 for more information.

Table 20-1: Attribute List Page Key (continued)

Item	Description
<p>4</p>	<p>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.</p> <p>This List includes the following information for each Attribute:</p> <ul style="list-style-type: none"> ■ 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). <i>This field is only used by Customer Attributes.</i> ■ OpenAccess - Indicates whether the Attribute has Open Access. <i>This field is only used by Customer Attributes.</i> ■ 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.

The screenshot shows a window titled "Edit Attribute Definition" with a close button (X) in the top right corner. The window contains the following information:

Attribute Id	140	Actively Used	Yes
Name	SEASONAL_DEAL	Create Date	2014-07-18
Intended Use	PromoDeal	Create User Id	Relate
Attribute Group		Update Date	2014-07-19
Description	Is Promo-Deal Seasona	Update User Id	Tester1
Unique	Yes		
Required	<input checked="" type="checkbox"/>		
Editable	<input checked="" type="checkbox"/>		
OpenAccess	<input type="checkbox"/>		
Data Type	Logical		

A "Save" button is located in the bottom right corner of the window.

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.

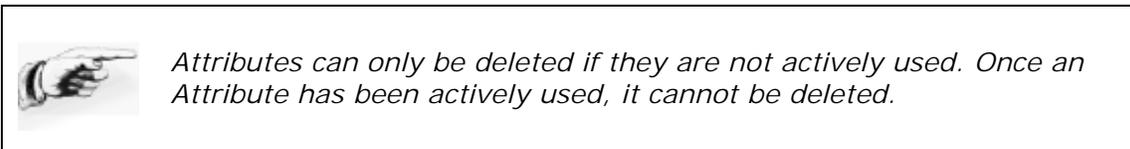
Figure 20-4: Edit Attribute Definition Window - List Value Definition

- **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



To delete an attribute:

1. [Open an Attribute](#) in an [Edit Attribute Definition Window](#).
2. Click the **Delete** button.

A confirmation prompt opens.

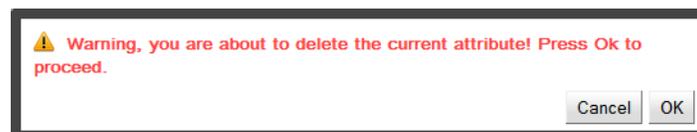


Figure 20-5: Delete Attribute Confirmation

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.

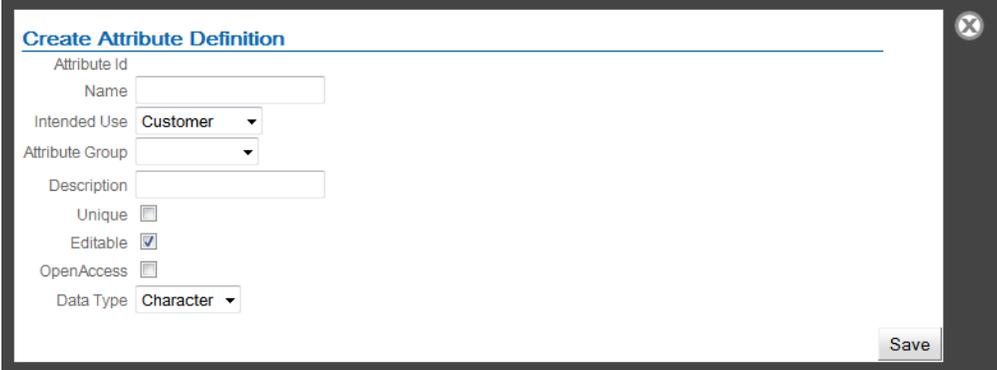


Figure 20-6: Create Attribute Definition Window

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](#).

Attribute Group

- 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.

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 576](#) - 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 580](#) - 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 585](#) - 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](#).

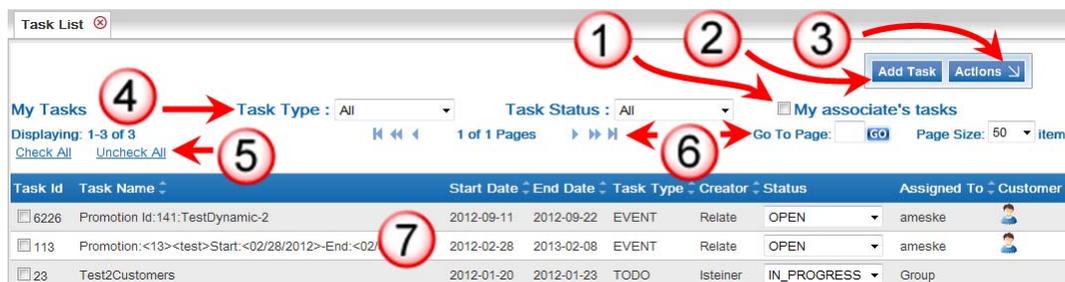


Figure 21-1: My Tasks

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. <i>This Check Box is only available for Users designated as Managers.</i> See also: The <i>Relate Configuration Guide</i> for more information about configuring Users.
2	Add Task Button - Click to create a new Task. See "Create a Task" on page 591 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 577 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 577 for more information.
5	Check Options - Links to place or remove a check mark (<input checked="" type="checkbox"/>) 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	<p>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.</p> <p>This List includes the following information for each Task:</p> <ul style="list-style-type: none"> ■ 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 578](#).



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 588](#).

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.

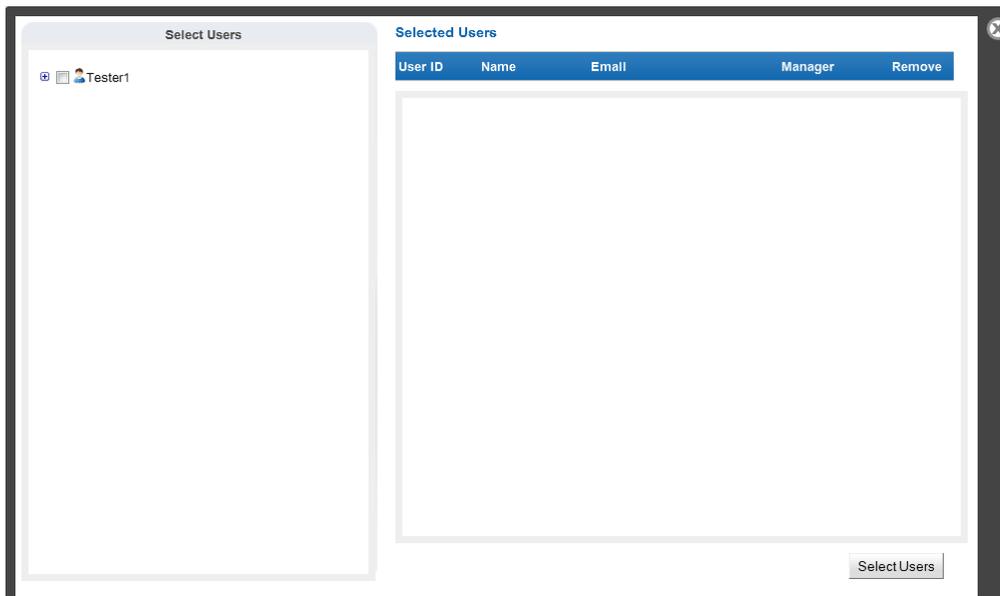
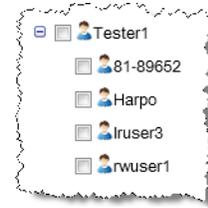


Figure 21-3: Reassign User Window

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 582](#) 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.

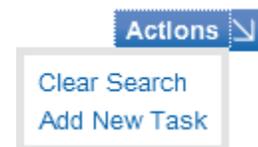
See also: *Relate Configuration Guide* for information about configuring Task priorities.

- **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 591](#).



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.

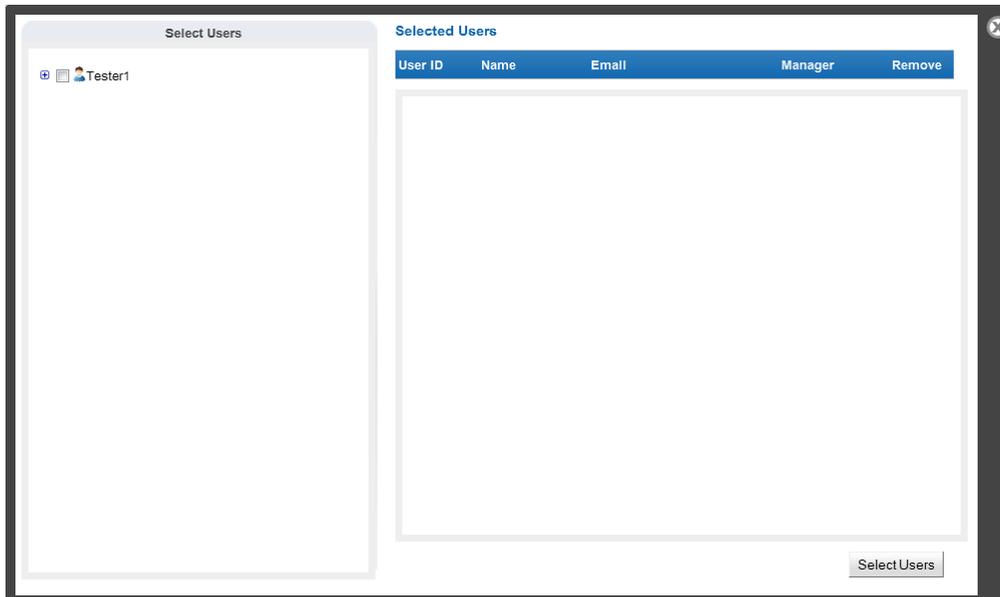
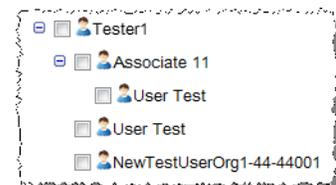


Figure 21-6: Select Users Window

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.

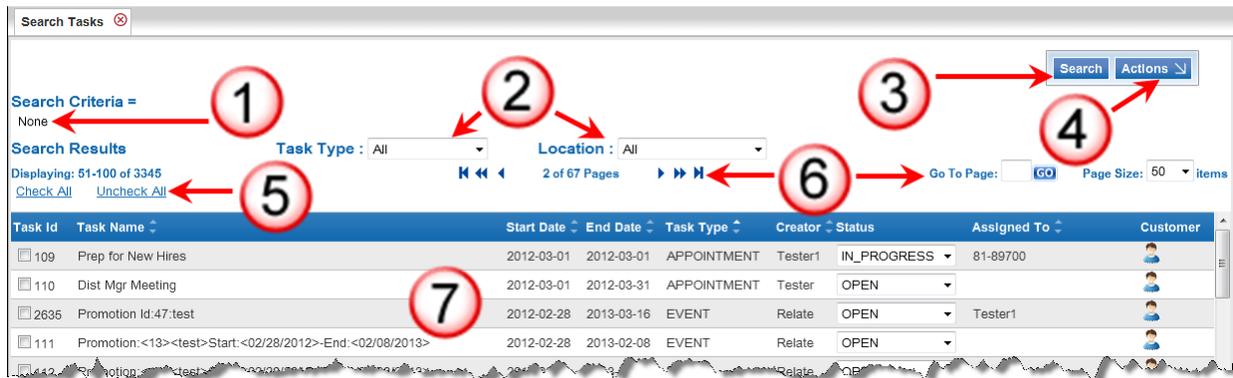


Figure 21-8: Task Search Results Screen

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 Menu" on page 584 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 584 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	<p>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.</p> <p>This List includes the following information for each Task:</p> <ul style="list-style-type: none"> ■ 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 591](#).
- **Re-assign** - Reassign the Task to a different User. See [“Reassign a Task” on page 578](#).



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:

The screenshot shows the 'Edit Task' window with the following fields and sections:

- Task Type:** TASK (dropdown)
- Creator:** Relate
- Status:** OPEN (dropdown)
- Start Date:** 2014-04-24
- Start Time:** 11 :36 AM (time dropdowns)
- Duration:** (dropdown)
- End Date:** 2014-05-09
- End Time:** 11 :36 AM (time dropdowns)
- Update User Id:** (empty)
- Update Date:** (empty)
- Subject:** Task 811
- Priority:** LOW (dropdown)
- Location:** None (dropdown)
- Event:** (Please select) (dropdown)

Assigned User

User ID	Name	Email
ameske	ameske	ameske@micros.com

Assigned Customer

Customer Id	First Name	Last Name	City	State	Home Location
48717	Ronald	Embrey	BRYAN	TX	188

Notes

Notes	Note Type	Create UserId	Create Date
Task generated by segment ID <811>-<Tas...	?	Relate	2014 Apr 24 11:36:10

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.

Assigned User		
User ID	Name	Email
LS-Test1	User Test	testimportUser83@micros-retail.com

Figure 21-11: Assigned User List - APPOINTMENT, EVENT, TODO, MEETING, or TASK

Group Status Summary		Assigned User			
CANCELLED : 0	CLOSED : 0	User ID	Name	Email	Status
IN_PROGRESS : 1	OPEN : 2	newuser	newuser	newuser@email.com	OPEN
		rwuser1	rwuser1	rwuser1@email.com	IN_PROGRESS
		user1219	user1219	user1219@yahoo.com	OPEN

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.

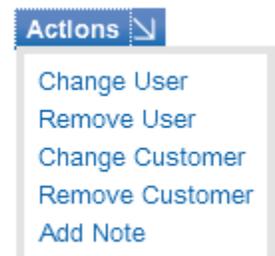
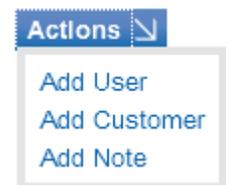
The following information is displayed for the Notes:

- 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 588](#)).
- **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 588](#)).
- **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 589](#)).
- **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 589](#)).



- **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 589](#)).
- **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 590](#)).
- **Add Note** - Add a Note to the Task (see [“Add a Note” on page 590](#)).

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 585](#) 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.

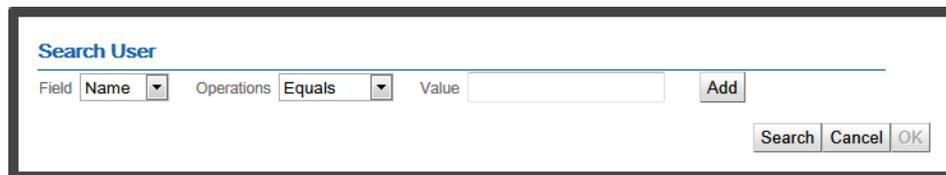


Figure 21-13: Search User Window

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.

The screenshot shows the 'Search User' window. At the top, there is a search bar with 'Field' set to 'Email', 'Operations' set to 'Contains', and 'Value' set to 'mail'. There are 'Add', 'Search', 'Cancel', and 'OK' buttons. Below the search bar is a table with the following data:

User ID	Name	Email
sammy206	sammy206	sammy206@mail.com
Sierra	Sierra	sierra@email.com
tester	tester	tester@email.com
user301	user301	user301@email.com

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.

The screenshot shows the 'Search Customer' window. At the top, there is a search bar with 'Field' set to 'First Name', 'Operations' set to 'Starts With', and 'Value' is empty. There are 'Add', 'Search', 'Cancel', and 'OK' buttons.

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.

The screenshot shows a 'Search Customer' window with two search criteria:

- Field: First Name, Operations: Equals, Value: Veronica, Add button.
- Field: Last Name, Operations: StartsWith, Value: H, Add button, Delete button.

Buttons: Search, Cancel, OK.

Customer Id	First Name	Last Name	City	State	Home Store
23320	Veronica	Hardman	SHELBY	NC	188
9565	Veronica	Held	PHILADELPHIA	PA	188
34734	Veronica	Huston	LINCOLN	NE	188
37684	Veronica	Holbrook	CHARLESTON	WV	188

Figure 21-16: Search Customer Results

- Click to select the Customer to associate with the Task.
- 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:

- Click **Add Note** in the [Actions Menu](#) for the [Edit Task Window](#) or the [Create a Task](#) screen.

An ADD NOTE [Window](#) opens.

The screenshot shows an 'Add task note' window with the following elements:

- Note Type: (Please select) dropdown menu.
- Note: A large text input area.
- Add button.
- Close button (X) in the top right corner.

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.

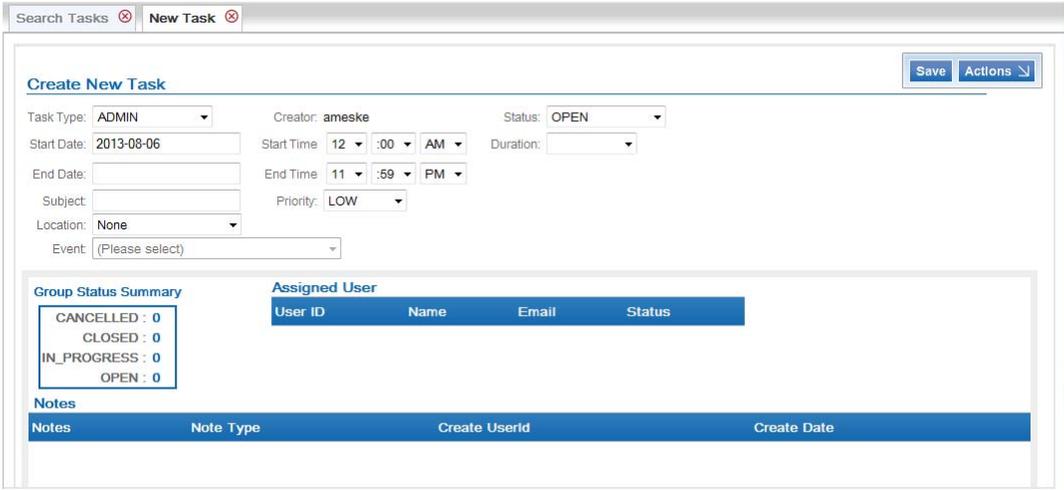


Figure 21-18: Create New Task Screen

- ❑ 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.

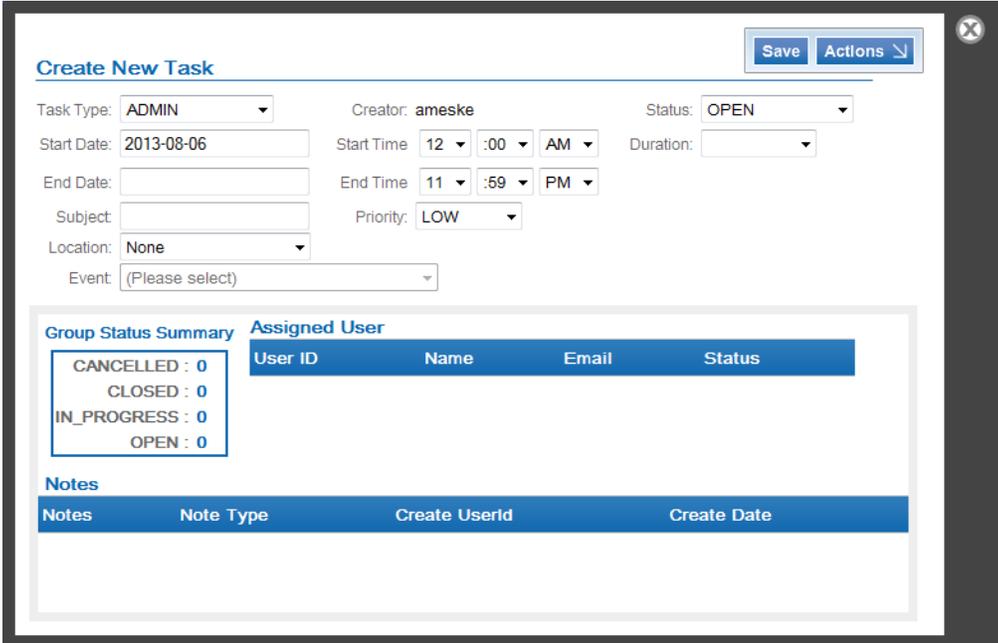
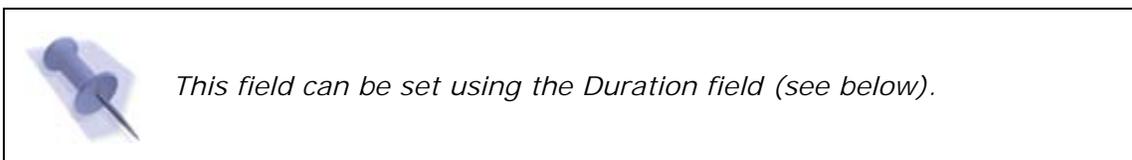


Figure 21-19: Create New Task Window

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.



- ❑ **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 588](#)). The **Assigned User List** displays the User assigned to the Task.

Assigned User		
User ID	Name	Email

Figure 21-20: Assigned User List - APPOINTMENT, EVENT, TODO, MEETING, or TASK

Group Status Summary		Assigned User			
CANCELLED : 0		User ID	Name	Email	Status
CLOSED : 0					
IN_PROGRESS : 0					
OPEN : 0					

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 589](#)). 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.



Assigned Customer					
Customer Id	First Name	Last Name	City	State	Home Location

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 590](#)). 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](#).

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 596](#) - Describes the Process Queue page.
- [“Job Results Window” on page 598](#) - 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](#).

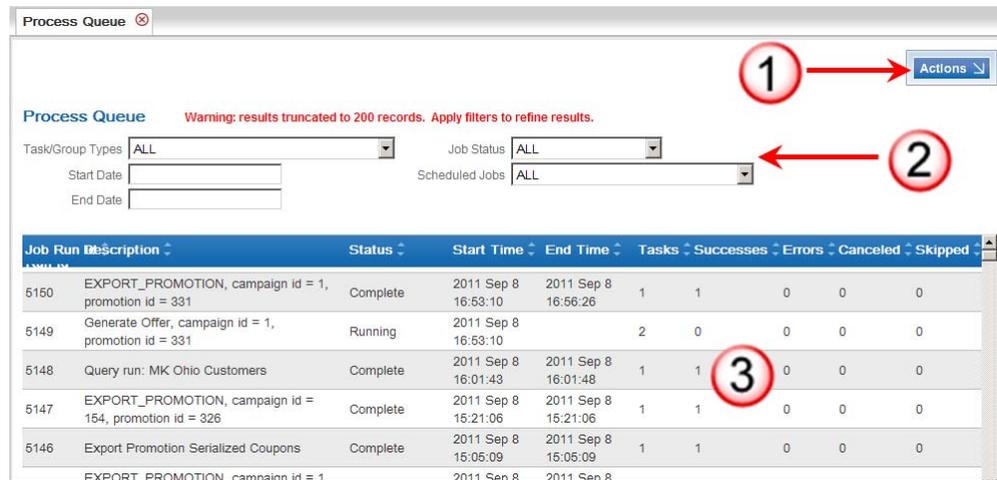


Figure 22-1: Process Queue Page

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 597 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 597 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:

 A screenshot of a filter menu interface with a torn paper edge effect. It contains several input fields: 'Task/Group Types' with a dropdown menu set to 'ALL'; 'Start Date' and 'End Date' as empty text boxes; 'Job Status' with a dropdown menu set to 'ALL'; 'Scheduled Jobs' with a dropdown menu set to 'ALL'; and 'Max Records' with a dropdown menu set to '50'.

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.

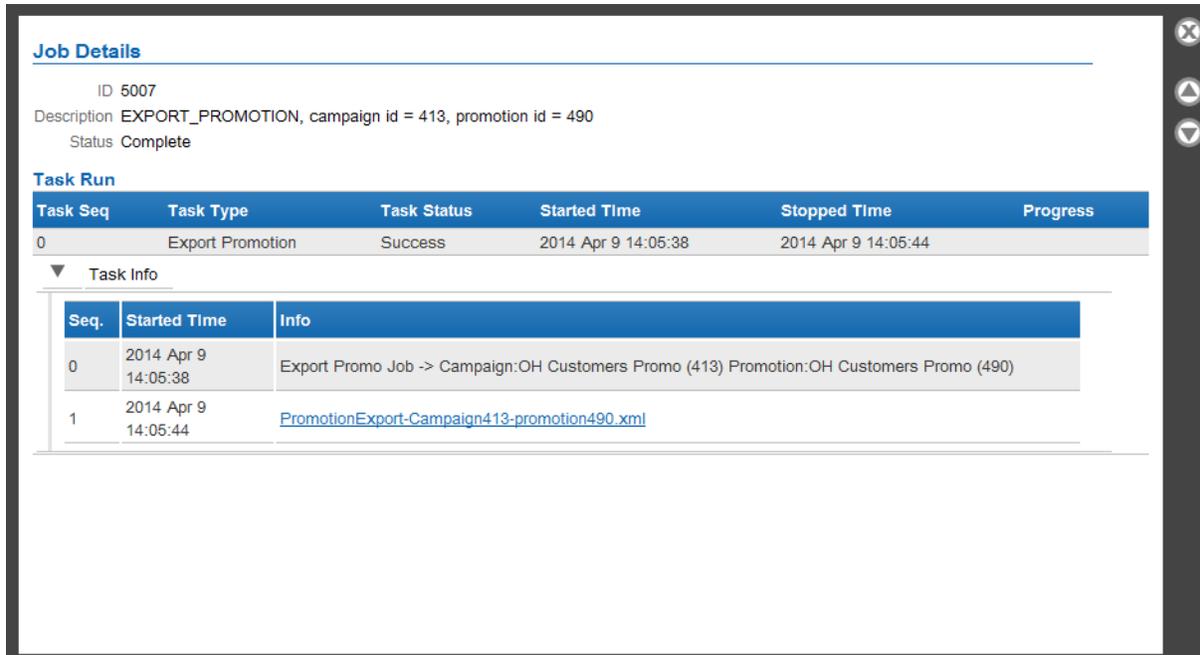


Figure 22-3: Job Results Window

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.

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 602](#) - Describes the Scheduled Jobs List and the functions available on it.
- [“Scheduled Job Window” on page 603](#) - Describes the Scheduled Job Window and its functionality.
- [“Schedule a Job” on page 607](#) - 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](#)..

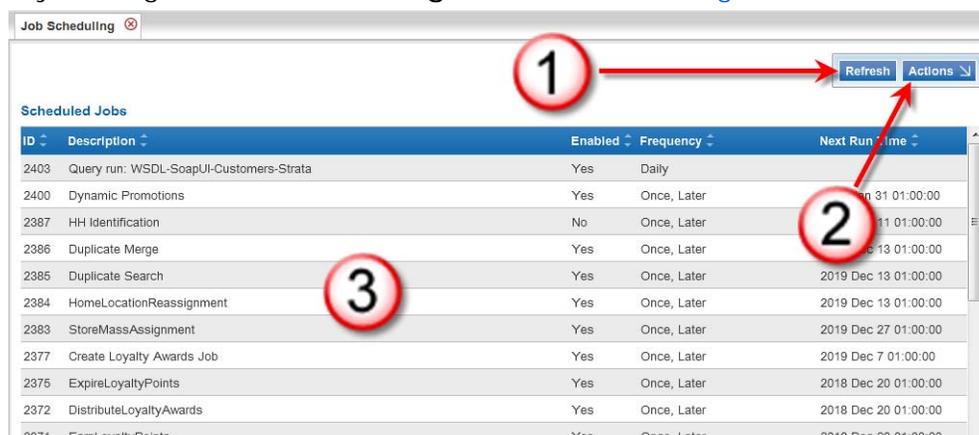


Figure 23-1: Scheduled Jobs List

Table 23-1: Job Scheduling Page Key

Item	Description
1	Refresh Button - Click to refresh the list.
2	Actions Menu - Click to open a menu of actions that can be performed in the Job Scheduling List page. See "Actions Menu" on page 602 for more information.
3	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.

The screenshot shows a web-based interface for a Scheduled Job. At the top right, there are 'Edit' and 'Actions' buttons. The interface is divided into several sections:

- General:** Contains fields for ID (9226), Job Description (Query run: PublishToClienteling2), Do not process remaining tasks on failure (No), Notification Email List (None), Create User Id (Relate), Update User Id, and Create Date (2014-08-25).
- Job Execution Info:** Contains Job Execution Frequency (Daily), Job Execution Time (01:00AM), Start Date (2015-08-30), and Override Job Processing Window (No).
- Job Processing Window:** Lists days and times for job execution: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday, each with a 24-hour duration.
- Task List:** A table with columns 'Seq.', 'Task Type', and 'Parameter Name / Value'. It contains one row: Seq. 1, Task Type 'Unstratified Segment', and Parameter Name / Value 'Customer Segment 3932: PublishToClienteling2'.

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 610](#) 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 605](#).
- **Enable** - Enable the Job (this option only available if the Job is disabled). See [“Enable Job” on page 605](#).
- **Delete** - Remove the Job from the system. See [“Delete Job” on page 606](#).
- **Run Job Immediately** - Run the Job now, regardless of scheduling. See [“Run Job Immediately” on page 606](#).



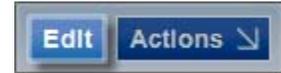
- **View Job In Process Queue** - Opens the [Process Queue](#) with the Job selected the [Scheduled Jobs Selection Menu](#) (in the [Filter Menus](#)). See [Chapter 22, "Process Queue" on page 595](#) for more information about the [Process Queue](#).

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 607](#) 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 595](#) 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.

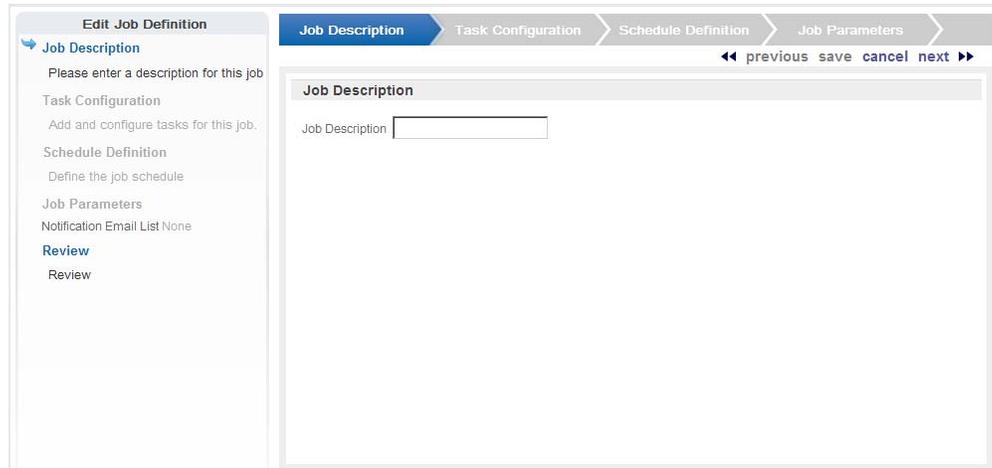


Figure 23-3: Create Job Wizard

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.

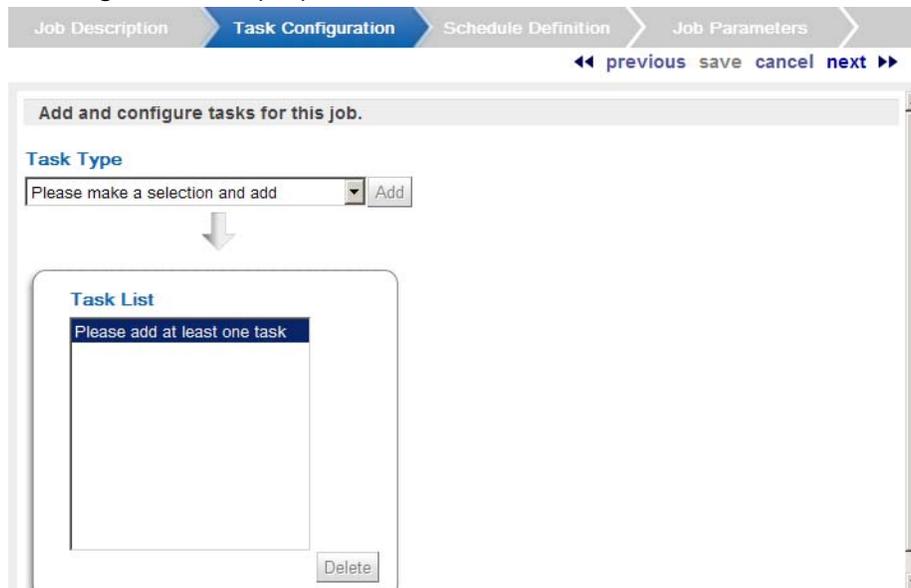


Figure 23-4: Task Configuration Step

4. Configure the Tasks in the Job:
 - a. Select a Task in the Task Type [Selection Menu](#). See [“Jobs and Tasks” on page 611](#) 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 617](#) 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.

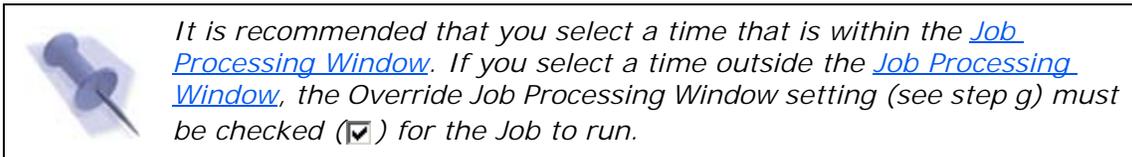
Figure 23-5: Schedule Definition Step

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.



- 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.

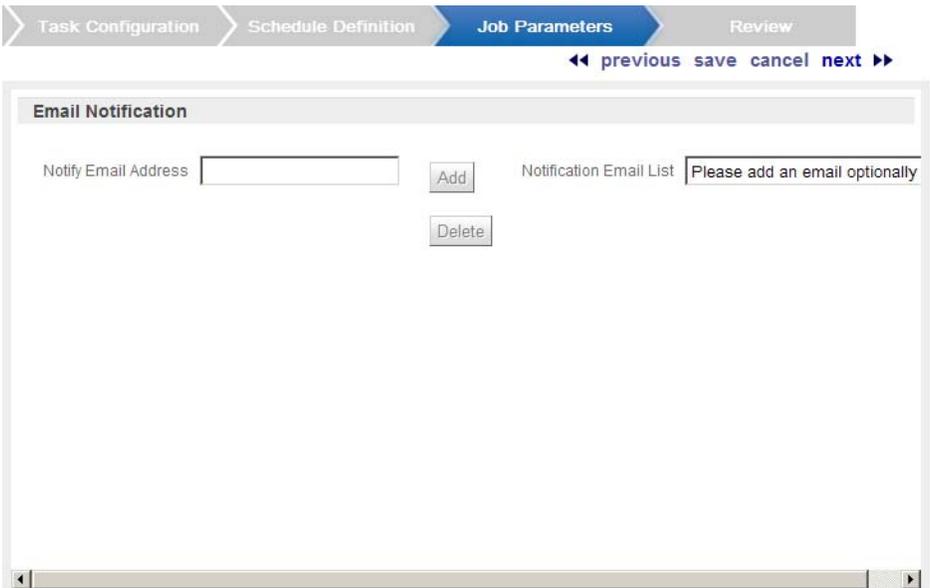


Figure 23-6: Job Parameters Step

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 617](#).

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 619](#)), 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 192](#).

Stratified Segment

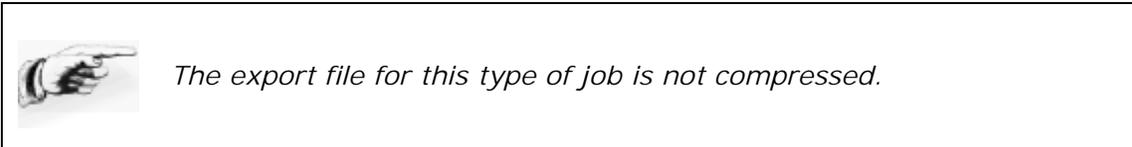
This task organizes Customers into user-defined levels and counts the number of Customers in each strata level. For more information on Stratified Segments, see ["Stratified Segments" on page 207](#).

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.



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.

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 191](#).

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 611](#).

The following sections describe the fields that configure each task:

Customer Tasks

- [“Location Mass Assignment” on page 618](#)
- [“Duplicate Search” on page 619](#)
- [“Duplicate Merge” on page 620](#)
- [“Household Identification” on page 622](#)
- [“Home Location Re-Assignment” on page 623](#)
- [“Franchisee Assignment” on page 624](#)
- [“Reset Customer YTD Totals” on page 626](#)

Associate Assignment Tasks

- [“Automated Associate Assignment” on page 627](#)
- [“Associate Mass Re-assignment” on page 628](#)

Customer Segment Tasks

- [“Unstratified Segment” on page 630](#)
- [“Stratified Segment” on page 631](#)

Account Tasks

- [“Export Card Series” on page 631](#)
- [“Release Expired PreAuth” on page 632](#)
- [“Notify Card Renewal” on page 632](#)

Award Account Tasks

- [“Issue Anniversary Awards” on page 633](#)
- [“Notify Awards Expire” on page 634](#)

OLAP Tasks

- [“Aggregate Loyalty Facts” on page 652](#)
- [“Aggregate Tender Facts” on page 653](#)

Loyalty Tasks

- [“Distribute Loyalty Awards” on page 635](#)
- [“Create Loyalty Awards” on page 636](#)
- [“Earn Loyalty Points” on page 637](#)
- [“Expire Loyalty Points” on page 637](#)
- [“Reset Loyalty YTD Points” on page 638](#)

Housekeeping Tasks

- [“Delete Customers” on page 638](#)
- [“Delete Inactive Customers” on page 639](#)
- [“Delete Transaction History” on page 640](#)
- [“Delete Promotion” on page 641](#)
- [“Delete Merged/Archived Customers” on page 642](#)
- [“Delete Loyalty Accounts and Activities” on page 643](#)
- [“Delete Loyalty Inquiry Activities” on page 644](#)
- [“Delete Segments” on page 645](#)
- [“Delete Segment History” on page 646](#)
- [“Delete Job History” on page 647](#)
- [“Delete Gift Registries” on page 648](#)

Housekeeping Tasks (cont’d)

- [“Delete Inactive Gift Registries” on page 649](#)
- [“Delete Social Activity” on page 650](#)
- [“Delete Award Inquiry Activities” on page 651](#)

Campaign

- [“Dynamic Promotions” on page 654](#)

Social Network Integration

- [“Social Network Listener” on page 655](#)
- [“Social Network Update” on page 656](#)

Clienteling

- [“Task Generator” on page 657](#)

Location Mass Assignment

This Task has the following parameters:

The screenshot displays the configuration options for the 'Location Mass Assignment' task. At the top, there is a 'Task Type' dropdown menu with the placeholder text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains the text 'Store Mass Assignment' and a 'Delete' button. To the right of the 'Task List' is a 'Store Mass Assignment' section, which includes a 'Date Range Type' dropdown menu currently set to 'Last 6 Months'.

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:

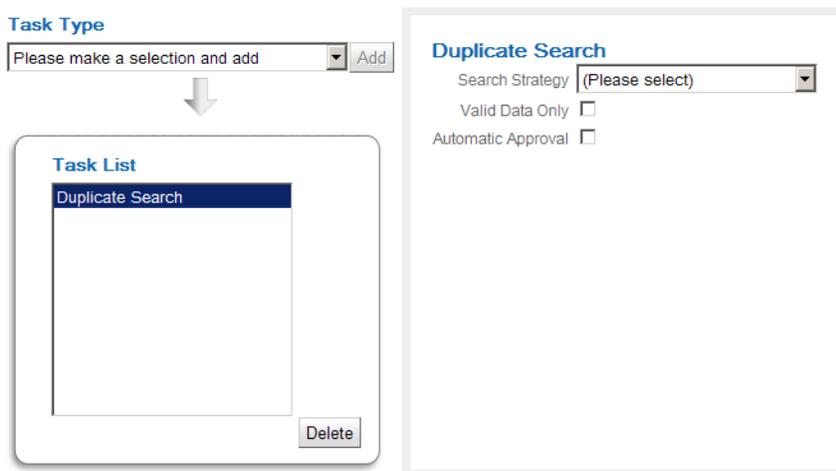


Figure 23-9: Duplicate Search Parameters

- **Search Strategy** - This [Selection Menu](#) determines the strategy used to search for duplicate Customers. See [“Search Strategy Field Comparisons” on page 619](#) 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 160](#) 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:

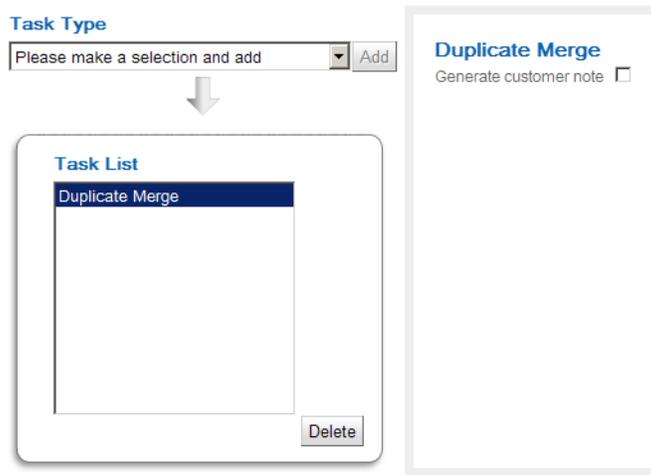


Figure 23-10: Duplicate Merge Parameters

- **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 160](#) 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:

The screenshot shows a user interface for configuring a task. On the left, a 'Task Type' dropdown menu is set to 'Please make a selection and add', with an 'Add' button below it. An arrow points down to a 'Task List' window, which contains a list with one item: 'Home Location Re-Assignment'. On the right, the 'Home Location Re-Assignment' configuration form is displayed. It features:

- Assignment Method:** Radio buttons for 'Re-assign' (selected) and 'Distribute among'.
- Currently assigned to:** A dropdown menu showing '(Please select)'. A link 'Click here to select' is to its right.
- Re-Assign to:** A list area showing '(Please select)'.
- Delete:** A link below the 'Re-Assign to' list.
- Lock Until:** A dropdown menu set to 'None'.

 A 'Delete' button is also located at the bottom right of the 'Task List' window.

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.

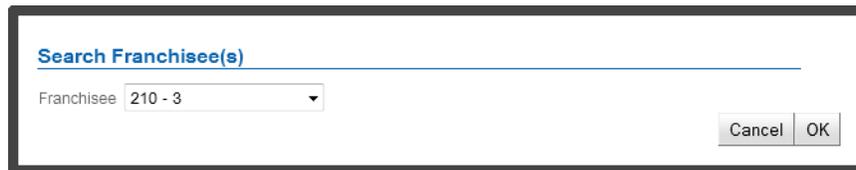


Figure 23-15: Search Franchisee(s) Window

- 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.

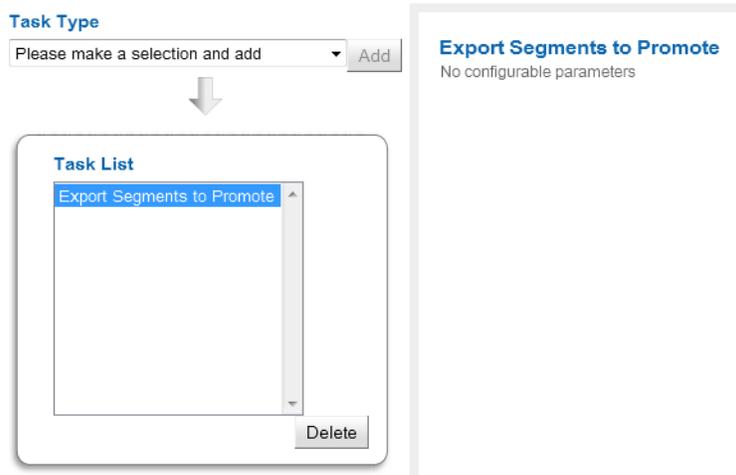


Figure 23-16: Export Segments to Promote Parameters

Reset Customer YTD Totals

This task has the following parameters:

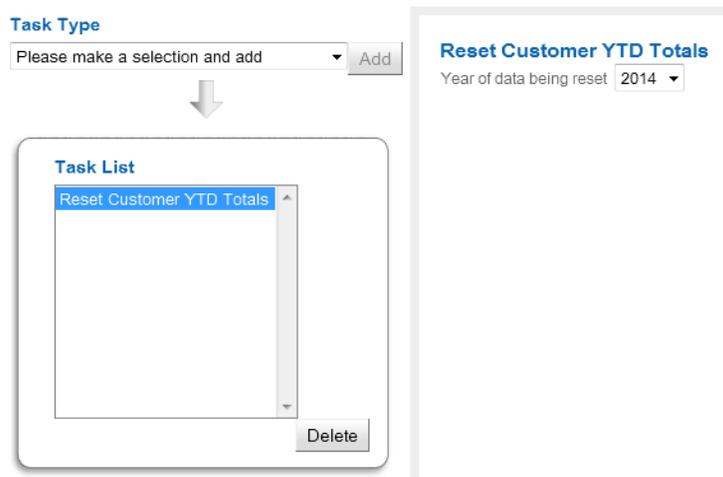


Figure 23-17: Reset Customer YTD Totals Parameters

- **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:

The screenshot displays the configuration interface for 'Automated Associate Assignment'. On the left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing the entry 'Automated Associate Assignment' and a 'Delete' button. On the right, the 'Automated Associate Assignment' configuration panel is shown with the following settings: Date Range Type set to 'Last 6 Months', Assignment Method set to 'Sold most frequently' (with 'Sold largest total amount' as an unselected option), Assignment Interval set to a blank field followed by 'days', Assignment Role set to 'Primary Role', and Criteria specification set to 'No additional criteria'.

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.

Criteria specification

[Add Item Criteria](#)

[Add Location Criteria](#)

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.

 **Source store: 110-Carson City is different from destination store: 44087-Twinsburg City Circle .**
Are you sure you want to proceed?

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.

Search Associate

Store. (Please select)

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.

User ID	Name	Email
Sales	SalesAssociate	kkearns@micros-retail.com
TestAccess	Testing Role Access	kkearns@micros-retail.com

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:

Task Type
Please make a selection and add [Add]

Segment Count
Customer Segment (Please select)

Task List

Segment Count

[Delete]

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:

The screenshot displays the configuration for a 'Stratified Segment' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains the text 'Stratified Segment' and a 'Delete' button. To the right of the 'Task List' is a 'Stratified Segment' panel. This panel has a 'Customer Segment' dropdown menu with the text '(Please select)'.

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:

The screenshot displays the configuration for an 'Export Card Series' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains the text 'Export Card Series' and a 'Delete' button. To the right of the 'Task List' is an 'Export Card Series' panel. This panel has two text input fields: 'Card Prefix' and 'Card Series'.

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:

The screenshot displays the configuration interface for 'Issue Anniversary Awards'. On the left, a 'Task Type' dropdown menu is set to 'Please make a selection and add' with an 'Add' button. Below it, a 'Task List' window shows 'Issue Anniversary Awards' with a 'Delete' button. The main configuration area on the right includes the following fields:

- Award Program:** (Please select) [dropdown]
- Coupon Prefix:** [text field]
- Amount:** [text field]
- Expiration Period Type:** Use Program [dropdown]
- Expiration Number of periods:** 0 [text field]
- The Expiration Date is Based On:** Run Date [dropdown]
- Anniversary Award Type:** Birthday [dropdown]
- Generate customer note:**
- Processing Window:**
 - Period Type:** Months [dropdown]
 - Num of Periods Before Run Date:** 0 [dropdown]
 - Num of Periods After Run Date:** 0 [dropdown]

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:

The screenshot displays the configuration interface for the 'Notify Awards Expire' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points from this menu to a 'Task List' box. The 'Task List' box contains a single entry, 'Notify Awards Expire', which is highlighted in blue, and a 'Delete' button at the bottom right. To the right of the 'Task List' is the 'Notify Awards Expire' configuration panel. This panel includes three fields: 'Award Program' with a dropdown menu showing '(Please select)', 'Period Type' with a dropdown menu showing 'Days', and 'Number of Periods' with a text input field containing the value '1'.

Figure 23-30: Notify Awards Expire Parameters

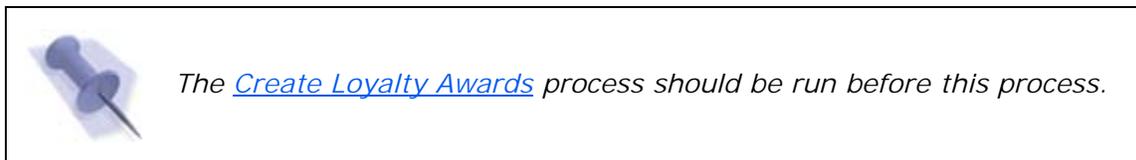
- **Award Program** - This [Selection Menu](#) determines the Award Program for which notifications will be sent.
- **Period Type** - This [Selection Menu](#) indicates the type of period used for determining the award expiration notification window.
- **Number of Periods** - Defines the number of periods (from Period Type) of the notification window.

Distribute Loyalty Awards

This Task has the following parameter:

The screenshot displays the configuration for the 'Distribute Loyalty Awards' task. At the top, there is a 'Task Type' dropdown menu with the placeholder text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains a single entry 'Distribute Loyalty Awards' and a 'Delete' button. To the right of the 'Task List' is a larger panel titled 'Distribute Loyalty Awards' which contains an 'Export File' text field.

Figure 23-31: Distribute Loyalty Awards Parameters



- **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:

Loyalty Program	Level	Enabled
MK Sept Program	MK Sept Level	<input checked="" type="checkbox"/>
MK Fall Program	MK Fall Base Level	<input checked="" type="checkbox"/>
	MK Fall Level 2000	<input checked="" type="checkbox"/>
	MK Fall Level 3000	<input checked="" type="checkbox"/>
XST Loyalty 2010	XST Loyalty 2010 - Level 1	<input checked="" type="checkbox"/>
MK Escrow Loyalty Program	MK Escrow	<input checked="" type="checkbox"/>
LOY May 26	1111111111222222222111111111112222222221111111111112222222221111	<input checked="" type="checkbox"/>
LOY another May 26	level 3	<input checked="" type="checkbox"/>
loyalty card test	level 1	<input checked="" type="checkbox"/>
MK 199057 Loyalty	MK 199057 Level 1	<input checked="" type="checkbox"/>
MK Test Loyalty	MK Test Loyalty	<input checked="" type="checkbox"/>
ST EXPIRE PTS	ST EXPIRE PTS RESET	<input checked="" type="checkbox"/>
	ST EXPIRE PTS ROLLING	<input checked="" type="checkbox"/>
MK 210 Loyalty Program	MK 210 Loyalty	<input checked="" type="checkbox"/>

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.

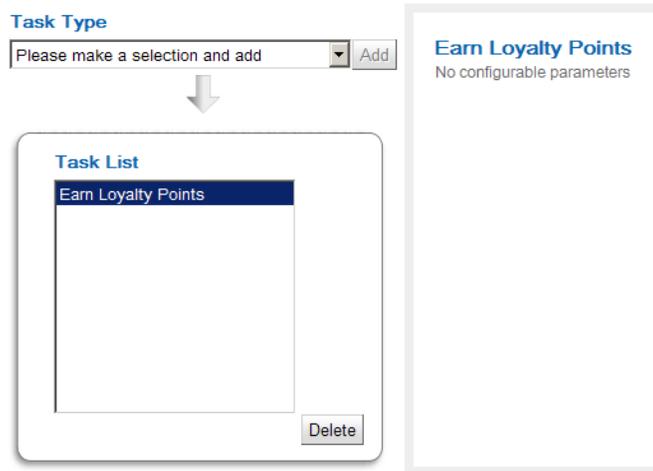


Figure 23-33: Earn Loyalty Points Parameters

Expire Loyalty Points

This Task has no additional parameters.

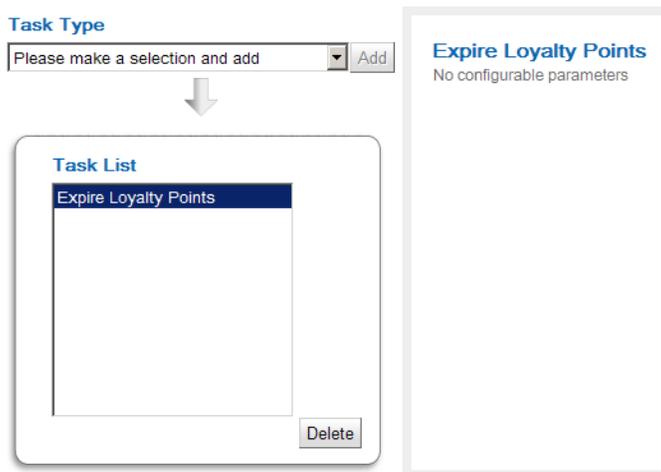


Figure 23-34: Expire Loyalty Points Parameters

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:

The screenshot displays the configuration for the 'Delete Inactive Customers' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing the task name 'Delete Inactive Customers' and a 'Delete' button. To the right is a 'Delete Inactive Customers' parameter panel with a 'Number of Days' text field (value 0), 'Based on Last Update Date', and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Transaction History' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains the text 'Delete Transaction History' and a 'Delete' button. To the right of the 'Task List' box is a panel titled 'Delete Transaction History'. This panel contains a 'Number of Days' text field with the value '0', the text 'Based on Business Date', and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Promotion' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing the text 'Delete Promotion' and a 'Delete' button. To the right of the 'Task List' is a 'Delete Promotion' configuration panel. This panel includes a 'Number of Days' text field with the value '0', a 'Based on Promotion End Date' label, and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Merged/Archived Customers' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing the text 'Delete Merged/Archived Customers' and a 'Delete' button. To the right is a configuration panel for 'Delete Merged/Archived Customers' with a 'Number of Days' text field set to '0', 'Based on Create Date', and a 'Report Only' checkbox.

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:

The screenshot displays the configuration interface for the 'Delete Loyalty Accounts and Activities' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing the task name 'Delete Loyalty Accounts and Activities' and a 'Delete' button. To the right is a configuration panel for 'Delete Loyalty Accounts and Activities' with a 'Number of Days' text field set to '0', a 'Based on Last Update Date' label, and a 'Report Only' checkbox.

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:

The screenshot displays the configuration interface for the 'Delete Loyalty Inquiry Activities' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains the text 'Delete Loyalty Inquiry Activities' and a 'Delete' button. To the right of the 'Task List' box is a panel titled 'Delete Loyalty Inquiry Activities'. This panel contains a 'Number of Days' text field with the value '0', the text 'Based on Last Activity Date', and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Segments' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing 'Delete Segments' and a 'Delete' button. To the right is a 'Delete Segments' configuration panel with a 'Number of Days' text field set to '0', a 'Based on Last Run Date' label, and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Segment History' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing 'Delete Segment History' and a 'Delete' button. To the right is a 'Delete Segment History' panel with a 'Number of Days' text field containing '0', a 'Based on Last Run Date' label, and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Job History' task. At the top, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains the text 'Delete Job History' and a 'Delete' button. To the right of the 'Task List' box is a configuration panel for 'Delete Job History'. This panel includes a 'Number of Days' text field with the value '0', the text 'Based on End Date', and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Gift Registries' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. Below this is a 'Task List' box containing a scrollable list with 'Delete Gift Registries' selected. To the right is a 'Delete Gift Registries' parameter panel with a 'Number of Days' text field set to '0', a 'Based on Expiration Date' label, and a 'Report Only' checkbox.

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:

The screenshot displays the configuration for the 'Delete Inactive Gift Registries' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains a scrollable list with 'Delete Inactive Gift Registries' selected and a 'Delete' button at the bottom right. To the right of the 'Task List' is a configuration panel for 'Delete Inactive Gift Registries'. This panel includes a 'Number of Days' text field with the value '0', a 'Based on Last Update Date' label, and a 'Report Only' checkbox which is currently unchecked.

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:

The screenshot displays the configuration interface for the 'Delete Social Activity' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains a single entry, 'Delete Social Activity', and a 'Delete' button at the bottom right. To the right of the 'Task List' is a larger panel titled 'Delete Social Activity'. This panel contains several configuration options: a 'Search Strategy' dropdown menu with '(Please select)' as the current selection; a 'Number of Days' text input field; a 'Based On Last Activity Date' label; and a 'Report Only' checkbox which is currently unchecked.

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:

The screenshot displays the configuration interface for the 'Delete Award Inquiry Activities' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains a list with one item, 'Delete Award Inquiry Activities', and a 'Delete' button at the bottom right. To the right of the 'Task List' is a larger panel titled 'Delete Award Inquiry Activities'. This panel contains a 'Number of Days' text field with the value '0', the text 'Based on Last Activity Date', and a 'Report Only' checkbox.

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.

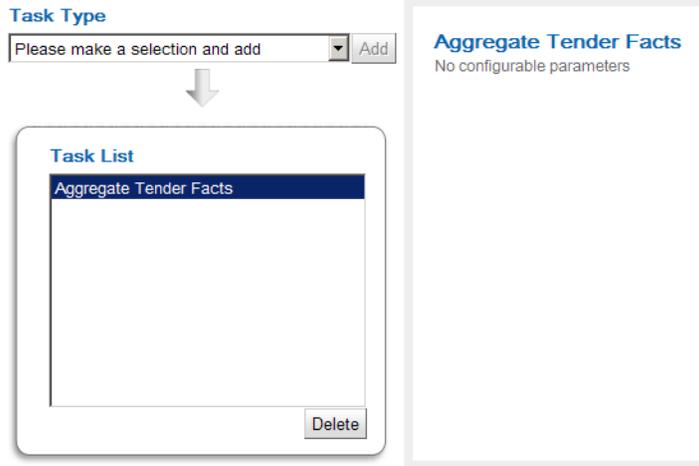


Figure 23-51: Aggregate Tender Facts Parameters

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.

The screenshot displays a software interface for configuring a task. At the top, there is a 'Task Type' section with a dropdown menu containing the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this section to a 'Task List' box. The 'Task List' box contains a single entry 'Dynamic Promotions' and a 'Delete' button. To the right of the 'Task List' is a larger box titled 'Dynamic Promotions' which contains the text 'No configurable 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.

Social Network Listener

This task has the following parameters:

The image shows a user interface for configuring a 'Social Network Listener' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points down from this menu to a 'Task List' box. The 'Task List' box contains a scrollable list with 'Social Network Listener' selected, and a 'Delete' button at the bottom right. To the right of the 'Task List' box is a larger configuration box titled 'Social Network Listener'. Inside this box, there is a 'Social Network' dropdown menu with the text '(Please select)'.

Figure 23-53: 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:

The screenshot displays the configuration interface for a 'Social Network Update' task. At the top left, there is a 'Task Type' dropdown menu with the text 'Please make a selection and add' and an 'Add' button. An arrow points from this menu to a 'Task List' box. The 'Task List' box contains a scrollable list with 'Social Network Update' selected and a 'Delete' button at the bottom right. To the right of the 'Task List' is the 'Social Network Update' configuration panel. This panel includes a 'Search Strategy' dropdown menu with '(Please select)' as the current selection, a 'Number of Days' text input field, a 'Based On Last Update Date' label, and a 'Report Only' checkbox which is currently unchecked.

Figure 23-54: 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 23-55: 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.

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 660](#) - Describes the Reports page and the procedures for creating a Report.
- [“Displaying Report” on page 669](#) - Describes the Reports display page.

Reports

The Reports page is opened through the **Analytics->Reports** menu option.

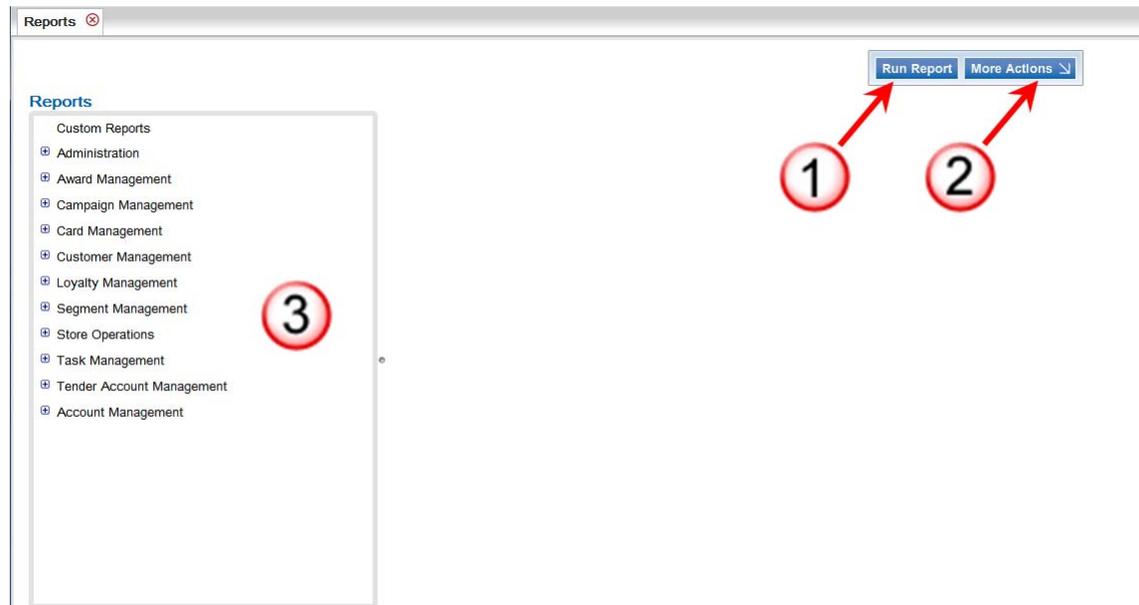


Figure 24-1: Reports Page

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 661 for more information.
2	More Actions Menu - The Actions Menu for the Reports page. See “More Actions Menu” on page 660 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 662](#).



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 662](#) for a list of Report categories and the Reports within each category).
 - b. Click a Report to select it.

A Report Criteria screen opens.

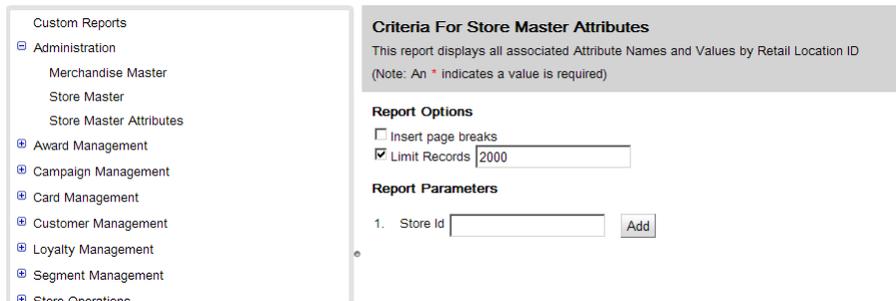


Figure 24-2: Report Selection Criteria

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.

More Actions ▾

Store Master Attributes				
Data Truncated at: 200 Records				
Attribute Value	Attribute Name	Store Id	Display Name	Create Date
001	Chain	0001	BROAD STREET	2008-11-24
		0002	BROADWAY MALL	2008-11-24
		0005	PERIMETER MALL	2008-11-24
		0007	NASSAU STREET	2008-11-24
0011	MAPLE AVE			

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.

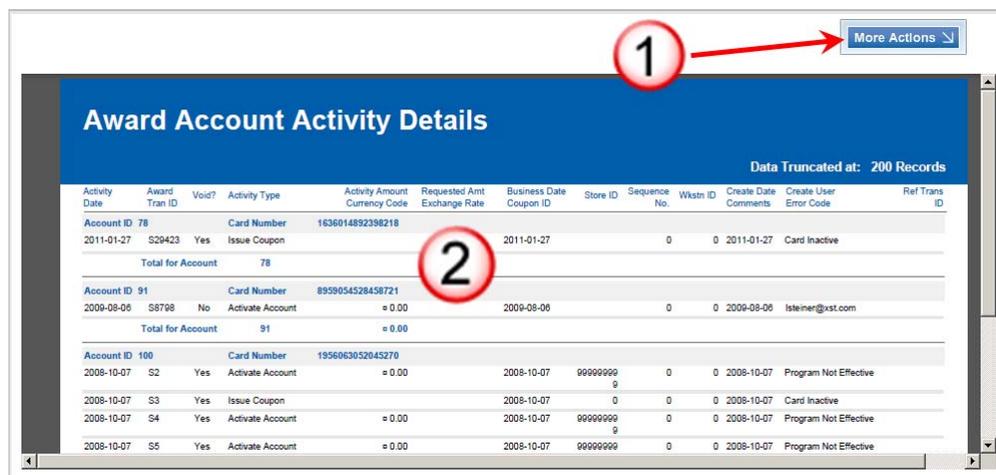


Figure 24-4: Displaying Reports Page

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 670 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 670](#).
- **EXPORT REPORT AS CSV** - Export the Report as a comma-separated values (CSV) file. See [“Export Report as CSV” on page 670](#).



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](#).



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](#).



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 661](#)).
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 661](#)).
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.

The screenshot shows the Acrobat toolbar at the top with various icons for printing, zooming, and navigation. Below the toolbar is a report titled "Award Account Activity Details" with a blue header. The report content is as follows:

Activity Date	Award Tran ID	Void?	Activity Type	Activity Amount Currency Code	Requested Amt Exchange Rate	Business Date Coupon ID	Store ID	Sequence No.	Wkstn ID	Create Date Comments	Create User Error Code	Ref/Trans ID
Account ID 78				Card Number	1636014892398218							
2011-01-27	S29423	Yes	Issue Coupon			2011-01-27		0	0	2011-01-27	Card Inactive	
Total for Account				78								
Account ID 91				Card Number	8959054528458721							
2009-08-06	S8798	No	Activate Account	0.00		2009-08-06		0	0	2009-08-06	Isteiner@xst.com	
Total for Account				91	0.00							
Account ID 100				Card Number	1956063052045270							
2008-10-07	S2	Yes	Activate Account	0.00		2008-10-07	99999999	0	0	2008-10-07	Program Not Effective	
2008-10-07	S3	Yes	Issue Coupon			2008-10-07		0	0	2008-10-07	Card Inactive	

Figure 24-6: Acrobat Toolbar



This toolbar 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.

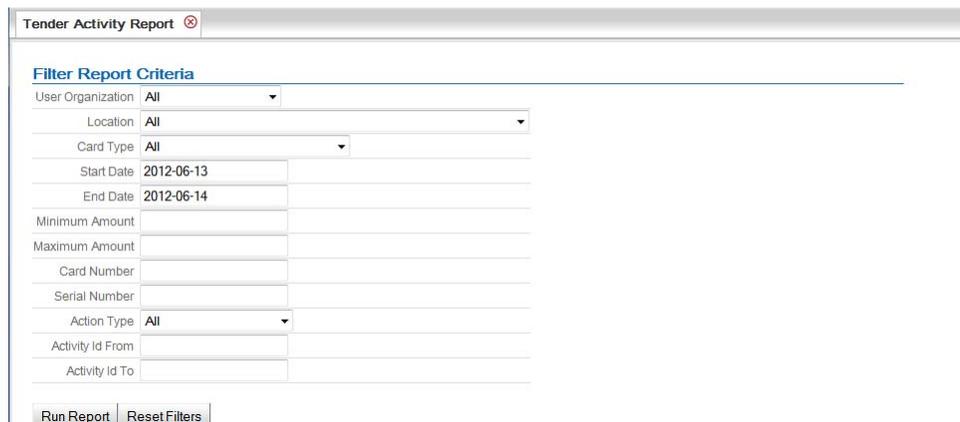


Figure 24-7: Tender Activity Report Page

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

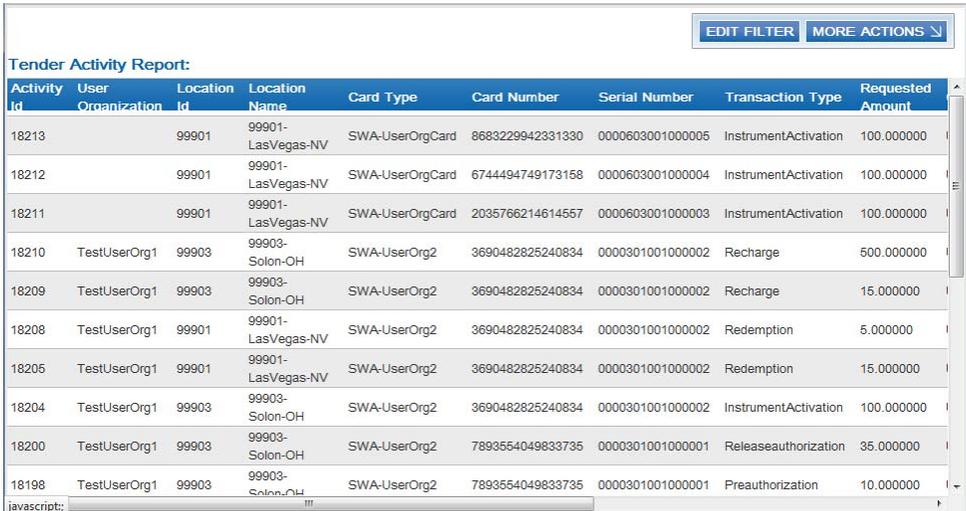
This form contains the following fields:

- **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.

 A screenshot of a web browser window showing a 'Tender Activity Report'. At the top of the report content area, there is a link labeled 'Export File'. Below this, a table is visible with columns for Activity Id, User Organization, Location Id, Location Name, and Card. The first row of data shows Activity Id 18213, User Organization 99901, Location Id 99901, Location Name 'Las Vegas, NV', and Card SWA.

Activity Id	User Organization	Location Id	Location Name	Card
18213	99901	99901	Las Vegas, NV	SWA

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 678](#)
- [“Customer Contact” on page 681](#)
- [“Customer Attributes” on page 682](#)
- [“Purchase Activity” on page 683](#)
- [“Basic Programs” on page 690](#)
- [“Segment Elements” on page 692](#)
- [“Promotion Activity” on page 692](#)
- [“Strategic Segments” on page 693](#)
- [“Loyalty Segments” on page 694](#)

- [“Social Networks” on page 697](#)
- [“Social Profiles” on page 698](#)

Stratified Queries

The following is a list of the Stratified Query categories:

- [“Loyalty Summary” on page 699](#)
- [“Transaction Criteria” on page 702](#)
- [“Line Item Detail” on page 703](#)

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 ID ▾

Customer whose Customer ID =

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 City ▾

Customer city of residence =

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.

Customer State ▾

Customer State =

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 ▼

Postal Code =

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.

POSTAL CODE VICINITY ▼

Customer living within miles of store id

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 Birthdate ▼

Birthday =

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.

Customer Birth Month ▼

Customer birth month = January ▼

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.

☐ Home Store ▼

Customers with home store = ▼

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.

☐ Signup Location ▼

Signup location = ▼

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.

☐ Customer Last Update Date ▼

Customer Last Update Date = ▼

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.

☐ Signup Date ▼

Customer sign-up date = ▼

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.

☐ Create Date ▼

Customer creation date = ▼

Active Customers

This query returns **all** active and valid Customers.
This query has no parameters to configure.

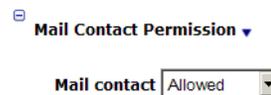


Customer Contact

Mail Contact Permission

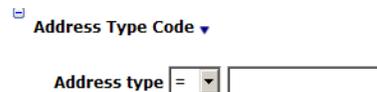
This query returns all Customers who have given permission to be contacted by mail.

- **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.

Email Contact Permission ▼

Email contact

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.

Valid Email Addresses ▼

Email address that is

Email Address Type

This query returns all Customers whose email type matches your selection.

- **Email Address Type** - The type of email address.

Email Address Type ▼

Email type

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.

String Attribute Values ▼

Customers with attribute name

having a string value

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.

 Logical Attribute Values ▼

Customers with attribute name
 having value

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.

 Date Attribute Values ▼

Customers with attribute name
 having dates between and

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 Sales ▼

Total sales =

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.

 Lifetime returns ▼

Returns total =

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 Sales ▼

YTD sales = 

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.

 Year-To-Date Returns ▼

YTD returns = 

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 First Purchase Date ▼

Customer first purchase date = 

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.

 Customer Last Purchase Date ▼

Customer last purchase date = 

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.

 **Number of Visits Between Dates** ▼

Number of visits = between the dates of and

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 in the Last X Days** ▼

Customers spending at least in the last days

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.

 **Value of Spending Between Dates** ▼

Sum of transactions = between the dates of and

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.

Fixed Period Activity ▼

Purchases between the dates of
 AND

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 in the Last X Months ▼

Purchases in the last months.

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.

Purchase Within X Days ▼

Purchase in last days

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.

Department in X Months ▼

Department in months

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.

 Class in X Months ▼

Class in months

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.

 Returns In X Days ▼

Purchases returned in days

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.

 Transactions from Store Group in Last X Days ▼

Transactions from Location Attribute Name
 Attribute Value
 in last days

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 from Store Group in Last X Days ▾

Have purchased item level ▾

Item Value

From Location attribute Name

Location attribute Value

in last days

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.

PURCHASE ITEM WITH STRING TYPE ATTRIBUTE IN LAST X DAYS ▾

Purchase from Item Attribute Name ▾

Attribute Value

in last days

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.

PURCHASE ITEM WITH DATE TYPE ATTRIBUTE IN LAST X DAYS ▾

Purchase from Item Attribute Name ▾

Attribute Value

in last days

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.

PURCHASE ITEM WITH LOGICAL TYPE ATTRIBUTE IN LAST X DAYS ▾

Purchase from Item Attribute Name ▾

Attribute Value ▾

in last days

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.

PURCHASE ITEM WITH NUMERIC TYPE ATTRIBUTE IN LAST X DAYS ▾

Purchase from Item Attribute Name ▾

Attribute Value ▾

in last days

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.

Big Spenders ▼

Customers who spent at least
in at least visits

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.

Reactivation Program ▼

Customers who've shopped times
but not in the last months

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 Birthday ▼

Birthday Month is

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).

Happy Anniversary ▼

Sign-up Month

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).

☐ Thank You! ▼

Customers spending at least
in the last 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.

☐ Cross Sell Program ▼

Purchased Item
in last days

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.

☐ Big Spender - Store ▼

Spent at least
in stores

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.

☐ Anniversary Program ▼

Purchased Item
between AND days ago.

Segment Elements

Customers in Segment

This query returns all Customer who are in the Segment ID specified.

Customers in Segment ▼

Customers in segment

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.

Customers in Segment Strata Level ▼

Customers in Segment ID

with Strata Level

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.

Promotion Responders ▼

Customers responding to promotion ID

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.

Campaign Responders ▼

Customers responding to campaign ID

Strategic Segments

Customer Status

This query returns valid Customers whose status matches the one you have selected. Your options are "Active" [DEFAULT] and "Inactive".

Customer Status ▼

Customer Status: Active ▼

Mail File

This query returns all active Customers who have given permission to be contacted by mail and have a valid address.

Mail File ▼

Active customers in mail file

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.

Mail File By Home Store ▼

Mail File By Home Store = ▼

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 ▼

Active customers in phone file.

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.

Phone File By Home Store ▼

Phone File By Home Store = ▼

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 ▼

Active customers in email file.

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.

Email File By Home Store ▼

Email File By Home Store =

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 first use date ▼

All members of program

Program Level

where first use date in the last Days ▼

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.

Program X, Program Level Y, based on last use date ▼

All members of program

Program Level

where last use date in the last Days ▼

Loyalty Points Earned YTD

This query returns all Customers whose year-to-date earned points balance matches the entered data.

Loyalty Points Earned YTD ▼

Program members with a YTD earned point balance

=

Loyalty Points Earned LTD

This query returns all Customers whose lifetime-to-date earned points balance matches the entered data.

 **Loyalty Points Earned LTD** ▼

Program members with a LTD earned point balance
 = ▼

Any Program, Member/Non-Member

This query returns all Customers who have Cards/accounts that are or are not part of any Loyalty Program.

 **Any Program, Loyalty Activity by Store In Last X Days** ▼

All members of any program
 having activity of type ▼
 Location Attribute Name
 Location Attribute Value
 Business Date in Last X Days
 Accumulated point value = ▼

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, Member/Non-Member** ▼

All ▼
 of Program
 Program Level

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.

☐ Program X, Program Level Y, Loyalty Activity by Store In Last Z Days ▼

All members of program
Program Level
having activity of type All ▼
Location Attribute Name
Location Attribute Value
Business Date in Last Z Days
Accumulated point value = ▼

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.

☐ Any Program, Loyalty Activity by Store In Last X Days ▼

All members of any program
 having activity of type ▼
 Location Attribute Name
 Location Attribute Value
 Business Date in Last X Days
 Accumulated point value = ▼

Social Networks

Facebook

This query returns all Customers with a social profile for Facebook. This query has no additional parameters.

☐ FACEBOOK ▼

Customers with Facebook Social Media Type

Twitter

This query returns all Customers with a social profile for Twitter. This query has no additional parameters.

☐ TWITTER ▼

Customers with Twitter Social Media Type

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.

LANGUAGE ▼
 Customers Who Using Language = ▼

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.

FRIENDS COUNT ▼
 Customer Friends Count = ▼

Followers Counts

This query returns the Customers with a defined number of followers in their social profile.

- **Customer Friends Count** - The number of followers.

FOLLOWERS COUNT ▼
 Customer Followers Count = ▼

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 NAME ▼
 School Name:

School Year

This query returns all Customers with a specified graduation date, as specified in their social profile.

- **School Year** - The year of graduation.

SCHOOL YEAR ▼
 School Year = ▼

Hometown

This query returns all Customers with a specified hometown, as specified in their social profile.

- **Customers hometown** - Name of the hometown.

HOMETOWN ▼
 Customers hometown:

Gender

This query returns all Customers with a specified gender, as specified in their social profile.

- **Customers Gender** - Gender of the customer.

GENDER ▼
 Customers Gender: ▼

Location

This query returns all Customers living certain location, as specified in their social profile.

- **Customers Location** - Customer location.

LOCATION ▼
 Customers Location:

Strata Queries

Loyalty Summary

These options are available at the Strata Query step if you select Strata Type = Loyalty at the Strata Field step.

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.

Program Id X Program Level Y Active/Inactive ▼
 All members of program
 Program Level
 having an account status of ▼

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 by Date Range ▾

All members of program

program level

activity type

with activities between the dates of

AND

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 in Last X Days ▾

All members of program

program level

activity type

with activities in the last days

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 YTD ▼

All members of program

Program Level

Activity Type ▼

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.

Loyalty Activity Type LTD ▼

All members of program

Program Level

Activity Type ▼

Transaction Criteria

These options are available at the Strata Query step if you select Strata Type = Transaction and Based on = Header at the Strata Field step.

Location

This query returns the list of Customers who performed a transaction at a certain location.

- **Location** - Location ID of the location.

☒ Store ▼

Store:

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.

☒ Transactions in last X months ▼

Transactions in last months

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.

☒ Transaction Date Range ▼

From Date:

TO DATE:

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.

☒ Subtotal Amount ▼

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.

☒ Transactions from Store Group in Last X Days ▾

Transactions from Location Attribute Name

Attribute Value

in last days

Line Item Detail

These options are available at the Strata Query step if you select Strata Type = Transaction and Based on = Detail at the Strata Field step.

Location

This query returns the list of Customers who performed a transaction at a certain location location.

- **Location** - Location ID of the location.

☒ Store ▾

Store:

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.

☒ Transactions in last X months ▾

Transactions in last months

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.

Transaction Date Range ▼

From Date:
TO DATE:

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 Department ▼

Department Id =

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 Class ▼

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.

Item Style ▼

Style Id =

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.

Returned Items ▼

Returned Items: = True

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 Price ▼

Item Price: = ▼

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 Quantity ▼

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.

Item Id ▼

Item Id = ▼

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.

Purchased Item from Store Group in Last Y Days ▼

Have purchased item level ▼

Item Value

From Location attribute Name

Location attribute Value

in last days

