Oracle® Retail Customer Engagement

Release Notes
Release 16.0

December 2016

This document highlights the major changes for Release 16.0 of Oracle Retail Customer Engagement.

Overview

Oracle Retail Customer Engagement is a comprehensive, web-based, direct-marketing application designed for today's fast-paced retail environment, and consists of the following services:

- Customer Management and Segmentation Foundation: A required module that maintains and serves all customer-related information. In addition to managing core customer data, the service includes support for strategies that are based on in-store clienteling and gift registry.
- Campaign and Deal Management: Delivers promotional offers to transaction systems, drives execution, and performs analysis. It has a more operational focus and is considered complementary to solutions like Responsys or Eloqua, which are dedicated to orchestrating marketing communication campaigns. The service supports offer management, couponing, list targeting, and performance analysis.
- Loyalty and Awards: A leading points-based loyalty platform. It can be quickly configured to support program concepts from simple punch-card frequency programs to highly sophisticated programs involving a variety of earning opportunities, as well as recognition levels like gold, silver, and bronze. In addition to the management of points, the platform manages awards in the form of stored value or discounts on merchandise.
- Gift Cards: A highly evolved stored value solution. It features a sophisticated back-office user experience and supports global operations with cross-currency management and cross-channel delivery and fulfillment.

Hardware and Software Requirements

See the *Oracle Retail Customer Engagement Installation Guide* for the hardware and software requirements.

Browser Requirements

Connecting to Customer Engagement Cloud Services requires one of the following web browsers:

- Internet Explorer 9, 10, and 11
- Firefox

Functional Enhancements

The functional enhancements below are included in this release. For more information, see the *Oracle Retail Customer Engagement User Guide* in the Customer Engagement 16.0 documentation set.

Household Review

Customer Engagement already provided the ability to associate customers within a household. The UI now provides a screen listing information on the customers within a household, including sales and transaction totals. The user can also select a household member for further inquiry and editing.

Default User Privileges

A change in customer data security makes it easier to control access to customer information. A default security level defines the access to customer data by users who have not been granted a different level of access. Higher levels of access can be granted to groups of users, or a user can be granted higher access to individual customers.

Exchange Rate Maintenance

As with household association, Customer Engagement already provided the ability to set currency exchange rates, but did not support working with exchange rates through the UI. With this release, a screen suite enables the administrative user to create and review exchange rates between currencies.

Reposting Transactions

A new configuration option and an enhancement to POSlog processing provides a way to correct a potential issue that can occur when processing of POSlog files is out of sync with processing of customer files. If the transaction in a POSlog file specifies a customer ID that does not yet exist, the system can attempt to repost the transaction after a specified interval, thus allowing the customer updates to catch up to the POSlog updates.

Technical Enhancements

The technical enhancements described below are included in this release.

WebLogic

Customer Engagement is now deployed on Oracle WebLogic Server, with its performance, scalability, efficiency, and manageability.

BI Publisher

Reports in Customer Engagement are now generated through Oracle BI Publisher rather than JasperReports. The robust capabilities of BI Publisher include scheduling options, distribution options, and enhancements to the UI.

Reports have been revised, with some now including both tabular data and charts for visual impact. Also, report options have been streamlined to combine similar data into a single report where possible.

System Configuration in the UI

Before this release, system configuration was performed through Conflate, a separate, dedicated application, and the configuration settings were stored in files on the application servers. This release instead provides a suite of system configuration screens in the UI, with settings stored in the Customer Engagement database. Screen options include:

- Deployment of configuration settings
- Rollback of a deployment
- Audit log of configuration changes and deployments
- Upload of configuration settings; approval is required by a second user before the settings are imported and deployed
- Export of configurations, so they can be applied to another organization

Oracle Identity Management

The integration with Oracle Identity Management (OIM) enables a single sign-on, simplifying user maintenance and strengthening security. Many administrative tasks that were performed in the Customer Engagement UI are now available through OIM. OIM also provides the ability for a user to recover a forgotten password without the assistance of a system administrator.

Use of OIM is optional when Customer Engagement is deployed on premise; however, if OIM is not in installed, the user must enter credentials to run reports.

Web Service Activity Tracking

The UI now provides an administrative user the ability to review web service message activity. The user can view summaries for each web service, broken out into daily, weekly, and monthly totals. The UI can also drill down to review the total number of successful and unsuccessful messages processed for each message type and version within the time period.

Batch Import Reviewer

The interface for reviewing results of batch file processing known as the API File Reader has been removed. It has been replaced with an improved form, referred to as the Batch Import review. The Batch Import Review is accessible directly from the System menu within the UI.

Integration Enhancements

The integration enhancements described below are included in this release.

Interactive Marketing Platform Integration – Responsys / Oracle Marketing Cloud

Real-time data synchronization with Responsys in the Oracle Marketing Cloud enables the two systems to work together. The new data publishing framework with Responsys is highly powerful and scalable, and empowers Responsys users to leverage the extensive data held within Customer Engagement to design highly personalized marketing content and campaign orchestrations.

Once configured, an automated process can synchronize data on customers, customer attributes, customer segments, loyalty program memberships, and awards. Data on promotions, promotion targets, deals, deal attributes, and serialized coupons can also be exported to Responsys.

The integration also enables the import of 'Customer Event Data' (CED) data from Responsys. A customer note is created in Customer Engagement as a record of each contact.

Business Intelligence Platform Integration – Retail Insights

The business intelligence solutions offered by Oracle Retail Insights can now be synchronized with data from Customer Engagement. The strength of the two systems working together is that Retail Insights' science, powered by Customer Engagement's rich data, delivers more effective promotion targeting and greater understanding of customer behavior.

Related Documentation

For more information, see the following documents in the Oracle Retail Customer Engagement 16.0 documentation set:

- *Oracle Retail Customer Engagement User Guide*
- *Oracle Retail Customer Engagement Installation Guide ((Doc ID 1994453.1))*
- *Oracle Retail Customer Engagement Implementation Guide (Doc ID 1994453.1))*
- *Oracle Retail Customer Engagement Administration Guide (Doc ID 1994453.1)*
- *Oracle Retail Customer Engagement Batch Processing & Web Services Guide (Doc ID 1994453.1))*
- *Oracle Retail Customer Engagement Data Dictionary*

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