Oracle Retail Customer Engagement Cloud Services
User Guide
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Oracle® Retail Customer Engagement (Relate) Cloud Services User Guide, Release 17.0

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Preface

The Oracle Retail Customer Engagement Cloud Services User Guide provides guidance on the screens available for use within the application.

Audience

This User Guide is for the following audiences:

- Implementation staff for the retailer

- Business analysts who need information about product processes and interfaces

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Related Documents

For more information, see the following documents in the Oracle Retail Customer Engagement Cloud Services Release 17.0 documentation set:

- *Oracle Retail Customer Engagement Cloud Services Release Notes*

- *Oracle Retail Customer Engagement Cloud Services Batch Processing and Web Services Guide*

- *Oracle Retail Customer Engagement Cloud Services Implementation Guide*

- *Oracle Retail Customer Engagement Cloud Services Administration Guide*

See the Oracle Retail Customer Engagement Cloud Services 17.0 documentation library at the following URL:

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- Detailed step-by-step instructions to re-create

- Exact error message received
- Screen shots of each step you take

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http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, emphasis, or terms defined in text or the glossary.
italic	Italic type indicates book titles, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction

Overview

Oracle Retail Customer Engagement Cloud Services™ is a comprehensive, web-based, direct-marketing application designed for today's fast-paced retail environment.

Because Customer Engagement 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 Customer Engagement through its web interface. This interface is accessed through a web browser connecting to the Customer Engagement server.

About This Chapter

This chapter contains the following information:

- Conventions - Describes the conventions used in this guide.
- Login - Describes how to log into Customer Engagement.
- Logout - Describes how to log out of Customer Engagement.
- My Account - Describes the options available to update your account. Options include:
  - Change Name
  - Change E-mail
- User Interface - Describes common elements of the user interface. Elements include:
  - Accessing Pages
  - Tabs
  - Data Elements
  - Actions Menu
  - List
  - Layer List
  - File Upload
  - Window
  - Wizard

- [Eligibility Rules](#) - Describes the rules used to determine eligibility to certain types of groups. Eligibility rules include:

    - [Location Eligibility](#)

    - [Segment/Target Eligibility](#)

    - [Item Eligibility](#)

    - [Time Eligibility](#)

    - [Tender Eligibility](#)

Conventions

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

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

> **Important:** 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.

> **Tip:** 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.

Login

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

1. Use a web browser to navigate to the URL provided at the time of implementation (similar to: `<a target="_blank" href="https://">https://</a><hostname>:<port_number>/<ORG_ID>/OrceUI/relate.html`).

The Customer Engagement login page is displayed.
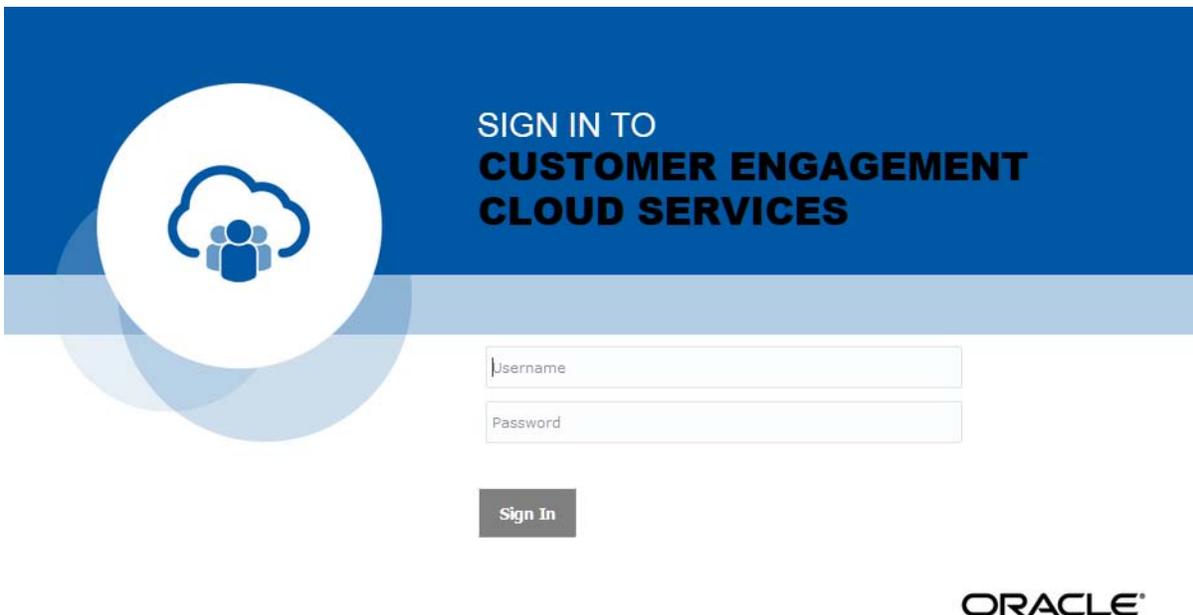
Figure 1-1: Customer Engagement Login

2. Enter your username in the **Username** field.

3. Enter your password in the **Password** field.

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

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

The Customer Engagement pages are displayed in the language defined for your user profile.

Logout

To log out of Customer Engagement:

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

    A menu of user options opens.
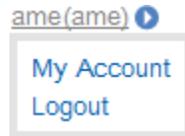
Figure 1-2: User Options Menu

2. Click **LOGOUT**.

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

My Account

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

To view your account information:

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

    A menu of user options opens.
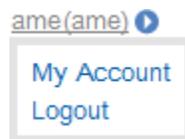
Figure 1-3: User Options Menu

2. Click **MY ACCOUNT**.

    The My Account page opens, displaying information about your account.
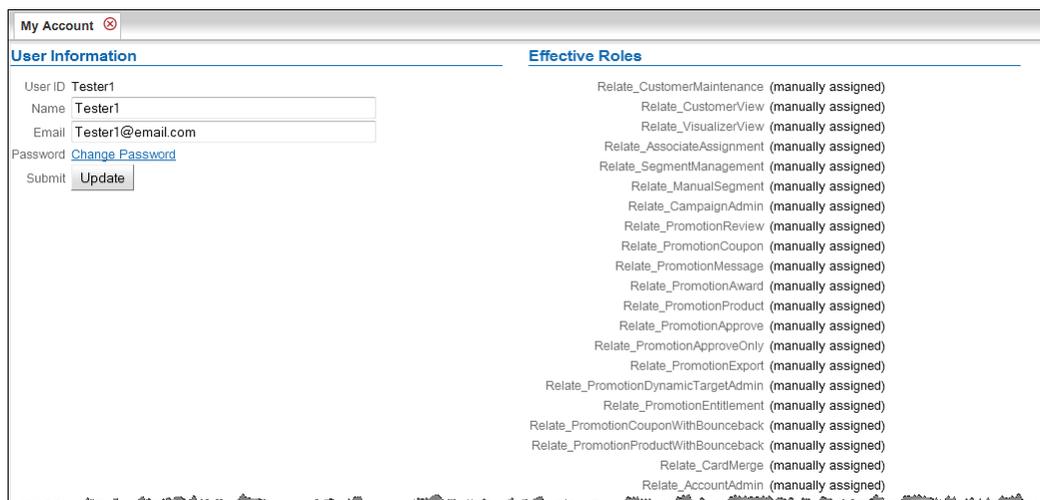
Figure 1-4: My Account Page

This page displays the following:

- **User ID** - Unique ID for your user account.

- **Name** - Name associated with your account.

- **E-mail** - Email address associated with your account.

- **Effective Roles** - Displays all of the Roles currently assigned to your user account.

> **Note:** Your assigned roles cannot be changed through the My Account page. For more information about assigning Roles, see the *Oracle Retail Customer Engagement Cloud Services Implementation Guide*.

Change Name

To change the name associated with your account:

> **Note:** 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.

User Interface

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

The Customer Engagement pages are displayed in the language defined for your user profile.

Accessing Pages

To access the various functions of Customer Engagement, 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 Customer Engagement screen to access most of the pages in Customer Engagement. This menu is available from every page in Customer Engagement, allowing instant access to most of Customer Engagement's functionality.

To access a page through the Customer Engagement 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 1-6: Customer Lookup/Edit Menu Option

Main Page

Some pages can also be accessed through the Customer Engagement Main Page, though many of them can only be accessed through the Customer Engagement Menu (e.g. pages in the Analytics and System Menus).
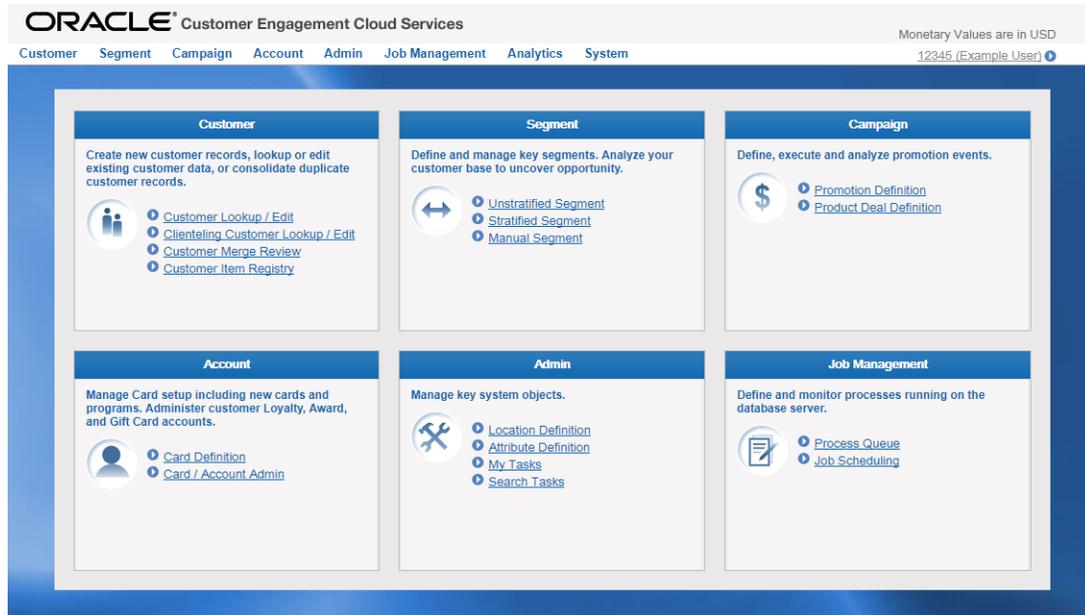
Figure 1-7: Main Page

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

Monetary Values

The currency used for all monetary values is indicated in the upper right corner of each page of Customer Engagement, above the user ID.

The currency code is from the Base System Currency configuration property. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information on configuration options.

Link

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

Figure 1-8: Links

Tabs

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

| Customer Lookup / Edit ⊗ | Promotion List ⊗ | Card Definitions ⊗ | **Customer Edit: 126789** ⊗ |

Figure 1-9: Tabs

- To switch to a different page within Customer Engagement, click on the Tab for that page.

- To close a page in Customer Engagement, 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.

more ⊕
Customer Lookup / Edit
Promotion List
Card Definitions
Customer Edit: 126789
Process Queue
Unstratified Segment
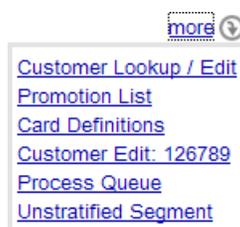
Figure 1-10: Tab List

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

Data Elements

When entering information into Customer Engagement, there are several standard types of entry fields used to provide information to Customer Engagement 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 [   ]
Email [hj@xyx.com   ]

Figure 1-11: Text Fields

Searches

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

- If there is no Matching Rule Menu, Customer Engagement will only return data that matches the field text exactly.

- If there is a Matching Rule Menu, Customer Engagement 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.

Customer Display

```
Welcome, Customer

Would you like to receive our sales circular?  Inform the
```
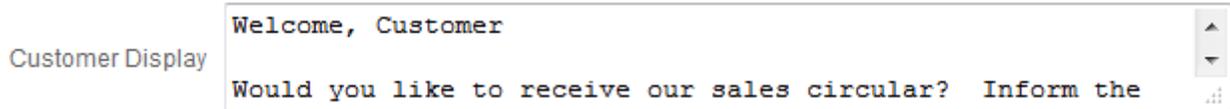
Figure 1-12: Text Area Field

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.

Address Type | HOME

Contact Permission\Opt In | promoinfo

- (Please select)
- FIRSTCONTACT
- N
- none
- orderinfo
- promoinfo
- Y
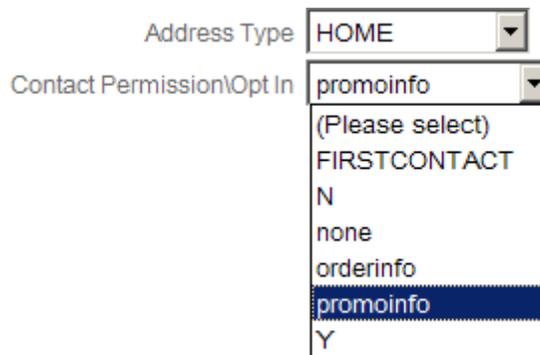
Figure 1-13: Selection Menus

Matching Rule Menu

In Customer Engagement, 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 Customer Engagement uses when comparing the information in a text field with the data in the system.

Equals
- Equals
- Starts With
- Ends With
- Contains

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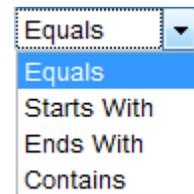
If the associated text field is blank, the Matching Rule Menu will be ignored by Customer Engagement.

Numeric Comparison Menu

In Customer Engagement, a <u>Text Field</u> can be associated with a <u>Selection Menu</u> that is used as a Comparison Menu, to compare numeric values in the <u>Text Field</u> with numeric values in the system. Whereas a <u>Matching Rule Menu</u> sets rules for matching text, a Numeric Comparison Menu sets rules for comparing relative values of numbers.
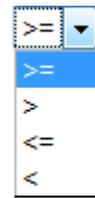
Customer Engagement provides the following numeric comparison rules:

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

- **>** - The value must be greater than the value in the <u>Text Field</u>.

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

- **<** - The value must be less than the value in the <u>Text Field</u>.

Time Menus

In Customer Engagement, time configurations can be performed through Time Menus. This is a set of <u>Selection Menus</u> 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 Customer Engagement, a Multi-Select Menu is a <u>Selection Menu</u> that allows users to select one or multiple options in the menu.
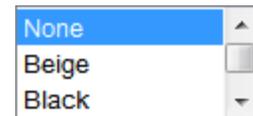
To select one option in a Multi-Select Menu, click that option; any other option(s) that are currently selected are unselected.

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 1-14: 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 1-15: 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, Customer Engagement 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.
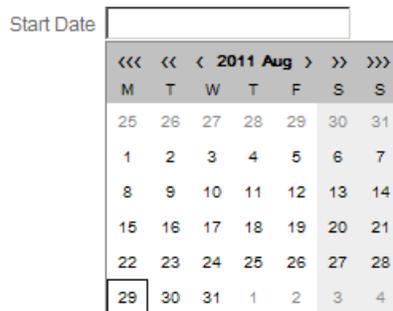
Figure 1-16: Calendar Menu

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 Customer Engagement 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.
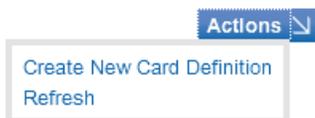
Figure 1-17: Actions Menu
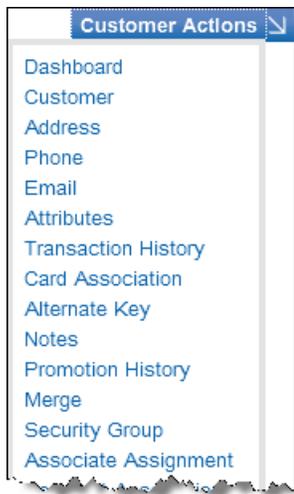
Figure 1-18: Customer Actions Menu

Figure 1-19: More Actions Menu

List

In Customer Engagement, 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 1-20: List

Filter

List pages in Customer Engagement 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.

Type All
All
Coupon
Product
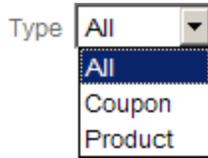
Figure 1-21: Selection Menu Filter

Start Date

‹‹‹	‹‹	‹	2011 Aug	›	››	›››
M	T	W	T	F	S	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
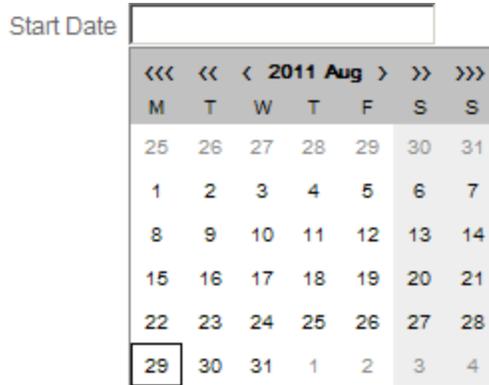
Figure 1-22: Calendar Menu Filter

Max. Deal Id
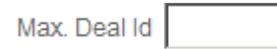
Figure 1-23: Text Field Filter

After selecting an option in a Filter, the List will display only 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.

> **Tip:** Some Lists in Customer Engagement 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.

Displaying: 1-50 of 273   ⫶◀◀ ◀   1 of 6 Pages   ▶ ▶▶ ⫶   Go To Page: GO   Page Size: 50 ▾ items

Figure 1-24: 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.

Figure 1-25: Layer List

Layer List Hierarchy

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

Figure 1-26: 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 1-27: File Upload Field

To use a File Upload field:

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

    A Choose File to Upload window opens.
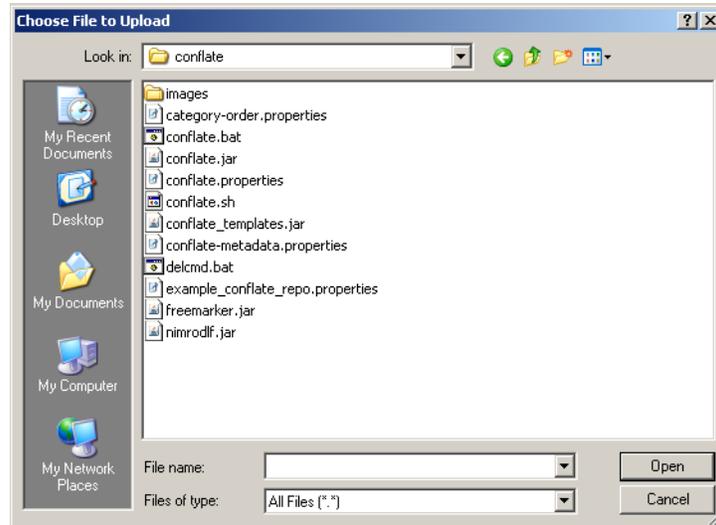
Figure 1-28: Choose File to Upload

2. Navigate to the directory in which the file is located.

3. Click the file to select it. Only files with the file extensions of jpg, jpeg, png, pdf, doc, docx, xls, and xlsx can be uploaded.

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 Customer Engagement, information may be accessed or edited through a pop-up Window within the Customer Engagement interface.
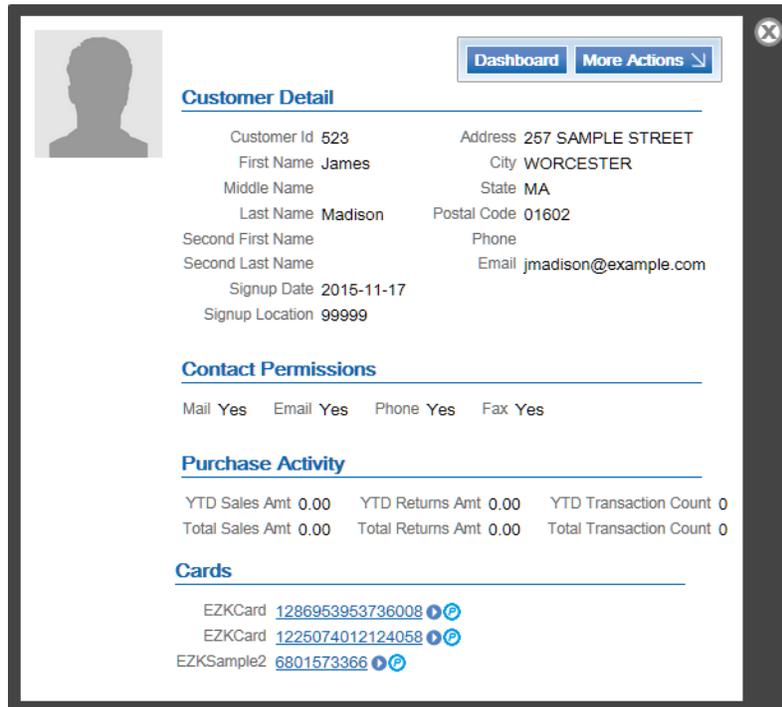
Figure 1-29: Window

Note: The pop-up Window is displayed within Customer Engagement, and is not a browser pop-up window. Therefore, it will not be affected by pop-up blockers.

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

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

-   Click the Customer Engagement 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 Customer Engagement, searching for a User is performed through a Search User Window.

Figure 1-30: Search User Window

1. Use the **Field** Selection Menu to select the criteria on which to search.

2. Use the **Operations** Matching Rule Menu to select the matching rule.

3. Enter the **Value** to search for.

4. If necessary, add or delete search criteria:

    -   To delete an unneeded set of search criteria fields click the **Delete** button for the search criteria.

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

Figure 1-31: Search User - Added Criteria

Note: When entering search criteria:

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

-   When search criteria is included for different Fields, the search results will include Customers that match ALL of the entered criteria (a logical AND).

---

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

The search results are displayed in a List.

Figure 1-32: Search User - Search Results

Search Customer Window

In some areas of Customer Engagement, searching for a Customer is performed through a Search Customer Window.
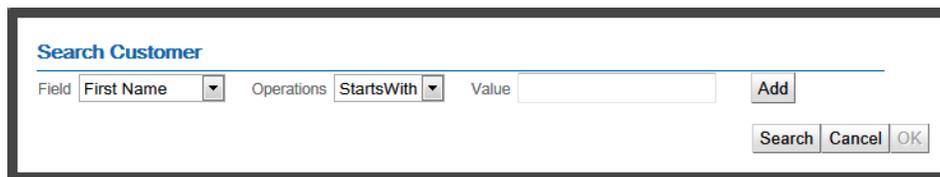
Figure 1-33: Search Customer Window

To use the Search Customer Window:

1. Select the **Field** to search. This Selection Menu has the following options:

    -   **First Name** - Customer first name.

    -   **Last Name** - Customer last name.

    -   **Email** - Customer email address.

    -   **Phone Number** - Customer phone number.

    -   **Customer Id** - ID of the Customer.

    -   **Alternate Key** - Alternate Key associated with the Customer.

2. Use the **Operations** menu to select the matching rule used in the search. This Matching Rule Menu has the following options:

    -   **Starts With** - The data must begin with the information in the text field.

    -   **Ends With** - The data must end with the information in the text field.

    -   **Contains** - The data can have the information in the text field anywhere within it.

    -   **Equals** - The data must match the information in the text field exactly.

3. Enter the **Value** to use in the search.

4. If necessary, add or delete search criteria:

    -   To remove a set of search criteria, click the **Delete** button next to the line.

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

Figure 1-34: Search Customer - Added Criteria

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

- When search criteria is included for different Fields, the search results will include Customers that match ALL of the entered criteria (a logical AND).

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

A List of search results is displayed.

Figure 1-35: 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 Customer Engagement 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 Customer Engagement.
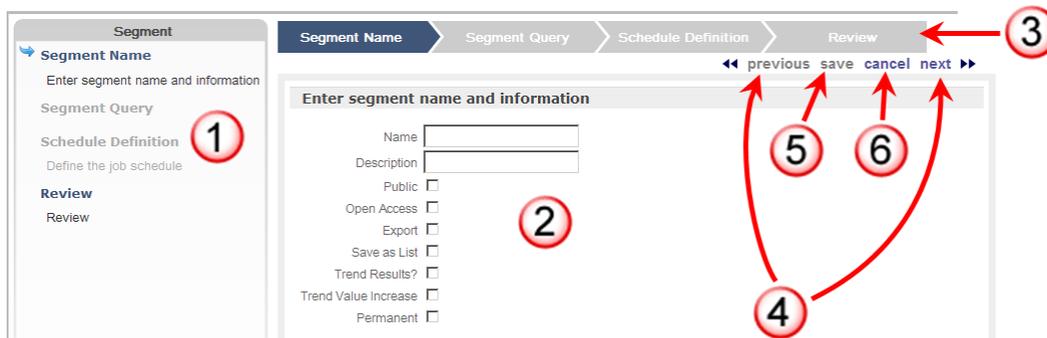
Figure 1-36: Sample Wizard

Table 1-1: *Sample Wizard Key*

Item	Description
1	**Wizard Navigation Panel** - Allows navigation to a specific step in the Wizard. See Wizard Navigation 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 for more information.
5	**Save Link** - Saves the current settings entered into the creation or update and closes the Wizard. See Save Current Settings for more information.
6	**Cancel Link** - Cancels the creation or update and closes the Wizard without saving changes. See Cancel Wizard 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.
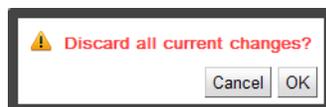
Figure 1-37: Confirmation Prompt

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

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

- Location Eligibility - These Eligibility Rules determine the Locations that will be eligible for a Customer Engagement element.

- Segment/Target Eligibility - These Eligibility Rules define Segments and determine which Customers belong to those Segments.

- Item Eligibility - These Eligibility Rules determine which items are eligible for a Customer Engagement element.

- Time Eligibility - These Eligibility Rules determine the days, times, and date range in which a Customer Engagement element is valid.

- Tender Eligibility - These Eligibility Rules determine the tenders that can be used in a Transaction for it to be eligible for some Customer Engagement element.

Location Eligibility

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

- Locations must meet the inclusion and exclusion parameters of the Location Eligibility Rule:

  - If no Locations are configured in either Included Locations or Excluded Locations, all Locations are eligible.

  - If Locations are configured in the Included Locations and none are configured in the Excluded Locations, then only those Locations in the Included Locations are eligible.

  - If Locations are configured in both Included Locations and Excluded Locations, only those Locations that are in the Included Locations and not in the Excluded Locations are eligible.

  - If Locations are configured in the Excluded Locations and none are configured in the Included Locations, then all Locations except those in the Excluded Locations are eligible.

- For a Location to be an Included or Excluded Location, it must be part of a Group.

Figure 1-38: 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 Customer Engagement element:

- Add Location Eligibility Rule to add a Location Eligibility Rule to an element.

- Delete Location Eligibility Rule 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 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 1-39: 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 1-40: Location Results List

> **Note:** 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, Customer Engagement will display the message "No results found."

5. Click a search result item to select it.

> **Tip:** Press and hold the [CTRL] button to select multiple list items.

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

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

Delete Location Eligibility Rule

To delete a Location Eligibility Rule:

1. Click the Location Eligibility Rule.

A menu opens displaying a list of options.

2. Click **Delete Attribute**.

The rule is deleted.

Segment/Target Eligibility

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

- Segments or Strata must meet the inclusion and exclusion parameters of the Segment Eligibility Rule:

    - If no Segments or Strata are configured in either Included Segments or Excluded Segments, all Segments and Strata are eligible.

    - If Segments are configured in the Included Segments and none are configured in the Excluded Segments, then only those Segments and Strata in the Included Segments are eligible.

    - If Segments are configured in both Included Segments and Excluded Segments, only those Segments and Strata that are in the Included Segments and not in the Excluded Segments are eligible.

    - If Segments are configured in the Excluded Segments and none are configured in the Included Segments, then all Segments and Strata except those in the Excluded Segments are eligible.

- For a Segment or Strata to be an Included or Excluded Segment, it must be part of a Group.

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 1-41: 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 Customer Engagement element:

- [Add Segment Eligibility Rule](#) to add a Segment Eligibility Rule to an element.

- [Delete Segment Eligibility Rule](#) 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.
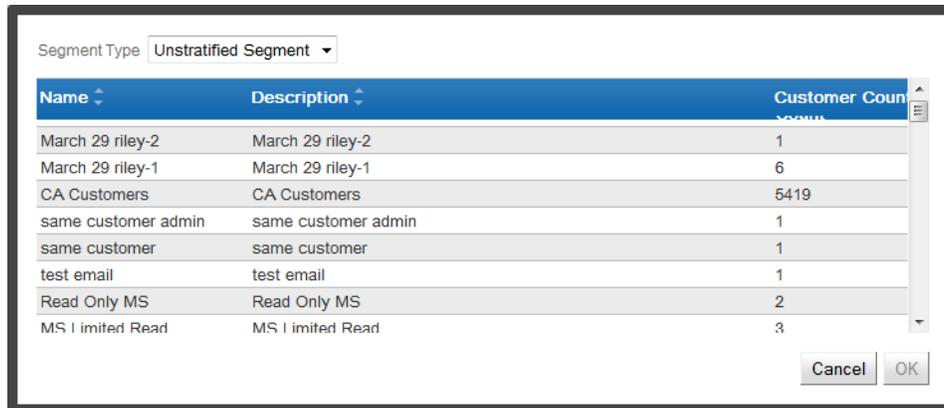
Figure 1-42: Segment Eligibility Window

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 1-43: Stratified Segments

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

Figure 1-44: 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 1-45: 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 Customer Engagement element:

- [Add Item Eligibility Rule (Simple)](#), [Add Item Eligibility Rule (Advanced)](#), or [Add Item Eligibility Rule (Culinary)](#)to add an Item Eligibility Rule to a Customer Engagement element.

- [Delete Item Eligibility Rule](#) to delete an existing Item Eligibility Rule from a Customer Engagement element.

- [Import Item Eligibility Rules](#) to import a set of Items into the Item Eligibility Rule through a comma-separated values (CSV) file.

- [Import Existing Deal](#) to import the Item Eligibility Rules from an existing Deal.

Add Item Eligibility Rule (Simple)

To add a simple Item Eligibility Rule to a Customer Engagement element:

1. Click the proper option to create an Item Eligibility Rule (see [Item Eligibility](#) 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 1-46: Item Selection Window (Simple)

2. In the **Item Filter** Selection Menu, select the type of Item Filter to add to the Rule.

3. In the Search Criteria Text Field, enter the value to search for in the Hierarchy Level.

4. Click the **Search** button.

A List displays the items matching the entered Search Criteria.

Figure 1-47: Item Selection Window - Search Results

> **Note:** 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 items associated with the selected Franchisee(s).

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

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

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

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

Determining Included Items

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

- If Attribute values are configured, ALL Attribute values in the Rule must be matched.

- If any other non-Attribute condition is configured, at least one non-Attribute condition must be matched.

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

- Department = 24

- Department = 26

- Season = Fall

- Attribute Size = 8.5

- Attribute Width = EE

And the following Items were configured in the system:

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

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

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

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

Add Item Eligibility Rule (Advanced)

To add an advanced Item Eligibility Rule to a Customer Engagement element:

1. Click the proper option to create an Item Eligibility Rule (see Item Eligibility 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.

Search for and select qualifying items or enter ID and press the <Enter> key to accept.
Item Hierarchy Search
Hierarchy Level (Please select) ▾
Cancel | OK
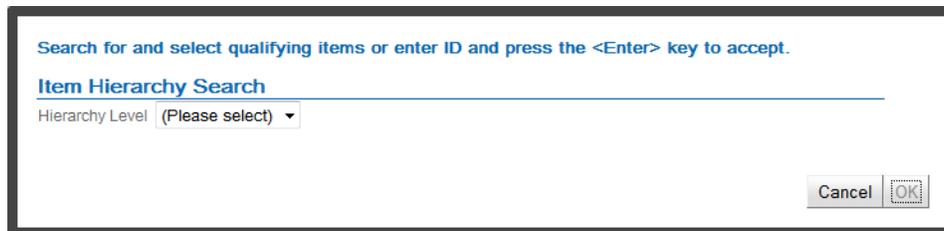
Figure 1-48: Item Selection Window

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 1-49: 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.

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

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

Figure 1-50: 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 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 1-51: 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.

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

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

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

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

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

10. Do one of the following:

- Return to step 2 to add more Item(s) to the Eligibility Rule.

- Click the **Cancel** button to close the Item Selection Window.

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

Search for and select qualifying items or enter ID and press the <Enter> key to accept.

Item Hierarchy Search

Hierarchy Level [Item ID ▼]   Search Criteria [   ]   [Search]

[Close] [Add]

Figure 1-52: 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.

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

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

14. Do one of the following:

- Return to step 2 to add more Item(s) to the Eligibility Rule.

- Click the **Close** button to close the Item Selection Window.

Item Attribute Filter Groups

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

- If no Attribute Filter Groups are included, Customer Engagement 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 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.

   <div align="center">

   Figure 1-53: Item Selection Window

   </div>

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 37.

   - 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 <u>List</u> displays the items matching the entered Search Criteria.

Item Hierarchy Search

| Hierarchy Level | Item ID ▼ | Search Criteria | 6 | Search |

Item Id ↕	Description ↕
66001	Paper Plates
66002	Paper Bowls
66003	Paper Cups
66004	Paper Napkins
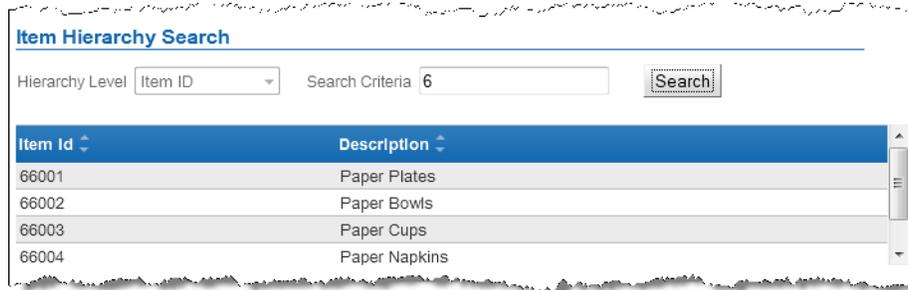
3) Click an item in the search result <u>List</u> to select it.

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

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

5) Continue with step 3 (below).

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

4. Repeat <u>step 2 on page 36</u> to add additional Item(s) to the Rule.

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

Delete Item Eligibility Rule

To delete an Item Eligibility Rule:

1. Click the Item Eligibility Rule to select it.

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

2. Click **Remove**.

A confirmation prompt opens.

⚠ You are about to delete items. Do you wish to proceed?
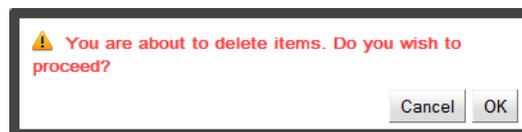
Cancel   OK

Figure 1-54: 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 <u>List</u>, click the **Remove All** <u>Link</u> for that <u>List</u>. All the Rules are removed.

Import Item Eligibility Rules

A set of Item Eligibility Rules can be imported into Customer Engagement 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.

Browse...

Import Cancel

Figure 1-55: Import CSV Window

2. Use the File Upload (Browse) 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 System Configuration.

        For information about System Configuration and configuring the names of Hierarchy Levels, see the *Oracle Retail Customer Engagement Cloud Services Implementation Guide*.

-   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 Customer Engagement, 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 1-56: Import Existing Deal Window

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

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

3. Click the **Search** button.

   A List of Deals matching the search criteria is displayed.

Figure 1-57: Search Results Returned

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

5. Click the **OK** button to import the Item Eligibility Rules for the selected Deal(s) and close the Window, or click **Cancel** to close the Window without performing the import.

Time Eligibility

Time rules constrain Customer Engagement 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 Customer Engagement 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 Customer Engagement element to be active during a defined period of time.

- **Blackout Period** - Rule that prevents the Customer Engagement 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 to add a Time Eligibility Rule to a Customer Engagement element.

- Edit Time Eligibility Rule to edit an existing Time Eligibility Rule.

- Delete Time Eligibility Rule 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.
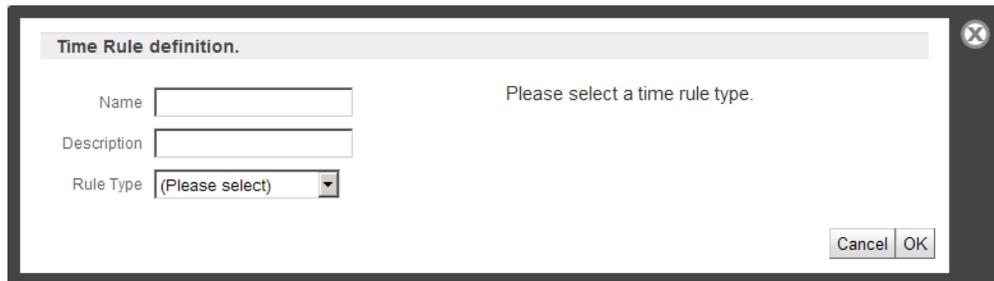
Figure 1-58: Time Rule Definition Window

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 Customer Engagement element to be active during a defined period of time.

   - **Blackout Period** - Rule that prevents the Customer Engagement 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 1-59: Time Configuration

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

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

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

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

e. In the **End Date** <u>Calendar Menu</u>, 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 <u>List</u> and close the <u>Window</u>, or click **Cancel** to discard the changes and close the <u>Window</u>.

Edit Time Eligibility Rule

To edit an existing Time Eligibility Rule:

1. In the Time Rule Definition <u>List</u>, click the Rule to edit.

   The Time Rule is opened in a Time Rule Definition <u>Window</u>.

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 Customer Engagement element to be active during a defined period of time.

     * **Blackout Period** - Rule that prevents the Customer Engagement 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 Customer Engagement 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 Customer Engagement element:

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

Figure 1-60: 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.

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

Figure 1-61: 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.

2

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 - Describes the Customer Lookup/Edit page and the procedure for looking up Customers. Options include:
  - Customer Lookup

- Customer List - Describes the information displayed and options available on the Customer List page. Options include:
  - Actions Menu
  - Open a Customer Record

- Customer Summary Window - Describes the information displayed and options available at the Customer Summary window. Options include:
  - More Actions Menu
  - Open Customer Dashboard

- Customer Dashboard - Describes the Customer Dashboard and the information displayed on it. Options include:
  - Customer Actions Menu
  - Customer Basics
  - Customer Data
  - Purchase Activity
  - Associate Assignments
  - Addresses
  - Email
  - Telephone Numbers

- Customer Attributes

- Alternate Key

- Cards/Accounts

- Customer Notes

- Segment Association

- Top 3 Depts - Current Calendar Year

- Promotion Events/Responses

- Preference Centers

- Social Profile

- Franchisee Assignments

- Edit/View Customer Record - Describes the pages used to edit Customer records and view Customer data. Options include:

    - Customer Information

    - Address

    - Telephone Number

    - Email

    - Attributes

    - Transaction History

    - Card Association

    - Alternate Keys

    - Customer Notes

    - Promotion History

    - Customer Merge

    - Household

    - Security Groups

    - Associate Assignments

    - Segment Association

    - Tasks

    - Item Visualizer

    - Update Customer Image

    - Item Registry

    - Item Registry Visualizer

    - Preference Centers

    - Social Profile

    - Social Activity

    - Franchisee Assignment

- Customer Validation - Describes Customer validation rules in Customer Engagement. Options include:

- [Names](#)

- [Prefix (Salutation)](#)

- [Suffix](#)

- [Gender](#)

- [Address](#)

- [Postal Code](#)

- [Email Address](#)

- [Phone](#)

Customer Lookup/Edit

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

> **Note:** 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 Customer Engagement:

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.

Tip: 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 Oracle Retail Customer Engagement Cloud Services Implementation 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 Oracle Retail Customer Engagement Cloud Services Implementation 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.

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

Figure 2-2: Customer Search Results List

Customer List

The Customer List is accessed through the Customer Lookup process.
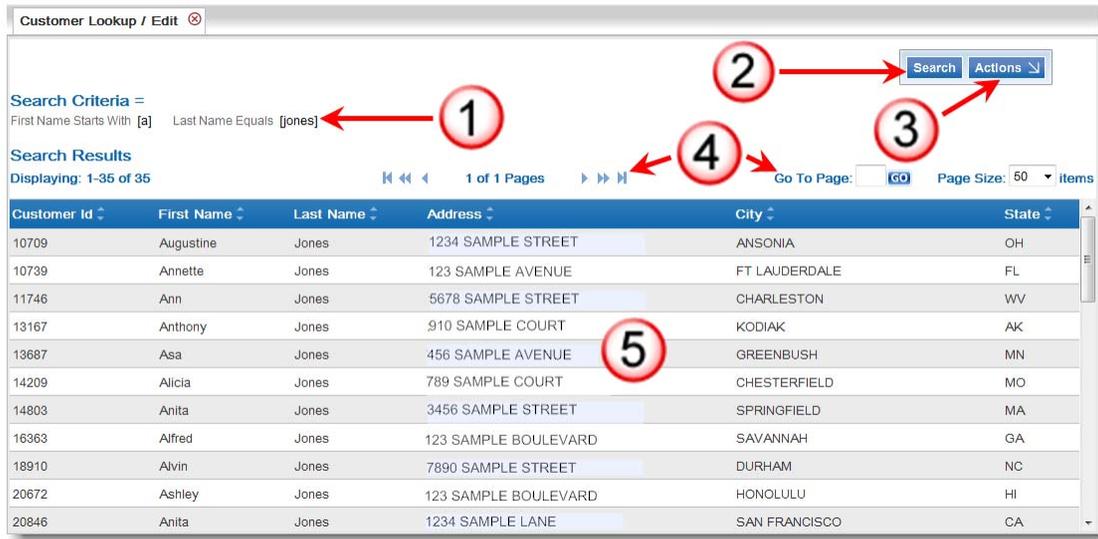
Figure 2-3: Customer List

Table 2-1: *Customer List Page Key*

Item	Description
1	**Search Criteria** - Displays the search criteria used for the search results displayed in the List.
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 for more information.
4	**Page Navigation** - Page Navigation for the List.
5	**Customer List** - A List of Customers currently in the system that match the search criteria. This List includes the following information for each Customer: • **Customer Id** - Unique identifier for the Customer. • **First Name** - Customer's first name. • **Last Name** - Customer's last name. • **Address** - Street address for the Customer. • **City** - Customer's city. • **State** - State or province for the Customer.

- **Second Last Name** - Customer's second last name.

  This field appears only if the system is configured to display additional customer names. See the Oracle Retail Customer Engagement Cloud Services Implementation 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 page 1 in Chapter 15, "Card/Account Administration".

  - 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 7) 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).

- **Card Association** - Add, edit, or delete Cards associated with the Customer (see Card Association).

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

- Clienteling Search

- Item Registry Lookup

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.

- **Customer Data** - Data collected for the Customer, such as Business Name, Birth Date, Gender, Marital Status, etc. See Customer Data.

- **Purchase Activity** - Sales statistics for the Customer. See Purchase Activity.

- **Associate Assignments** - Associates assigned to the Customer. See Associate Assignments.

- **Addresses** - Physical addresses for the Customer, such as home and business addresses. See Addresses.

- **Email Addresses** - Email addresses for the Customer. See Email.

- **Telephone Numbers** - Phone numbers for the Customer. See Telephone Numbers.

- **Customer Attributes** - Attributes assigned to the Customer. See Customer Attributes.

- **Alternate Keys** - Alternate keys assigned to the Customer. See Alternate Key.

- **Cards/Accounts** - Cards and accounts associated with the Customer. See Cards/Accounts.

- **Customer Notes** - Notes written about the Customer. See Customer Notes.

- **Segment Association** - Segments to which the Customer belongs. See Segment Association.

- **Top 3 Depts - Current Calendar Year** - Statistics and charts displaying the top purchases by the Customer. See Top 3 Depts - Current Calendar Year.

- **Promotion Events/Responses** - Statistics and charts showing the rate at which the Customer responds to Promotions. See Promotion Events/Responses.

- **Preference Centers** - Preference Centers to which the Customer is assigned. See Preference Centers.

- **Social Profile** - Social networks associated with the Customer. See Social Profile.

- **Franchisee Assignments** - Franchisees to whom the Customer has been assigned. See Franchisee Assignments.

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).

- **Address** - Add, edit, or delete Customer Addresses (see Address).

- **Phone** - Add, edit, or delete Customer Telephone Numbers (see Telephone Number).

- **Email** - Add, edit, or delete Customer Email Addresses (see Email).

- **Attributes** - Add, edit, or delete Customer Attributes (see Attributes).

- **Transaction History** - View the Transaction History for the Customer (see Transaction History).

- **Card Association** - Add, edit, or delete Cards associated with the Customer (see Card Association).

- **Alternate Key** - Add, view, or delete Alternate Keys assigned to the Customer (see Alternate Keys).

- **Notes** - View or add Customer Notes (see Customer Notes).

- **Promotion History** - View the Promotion History for the Customer (see Promotion History).

- **Merge** - Merge Customer records (see Customer Merge).

- **Household** - View all customers in the same Household (see Household).

- **Security Group** - Add, view, or delete the Security Groups assigned to the Customer (see Security Groups).

- **Associate Assignment** - Add, view, or delete Associate assignments (see Associate Assignments).

- **Segment Association** - View the Segments to which the Customer belongs, or add the Customer to one or more Segments (see Segment Association).

- **Tasks** - Add, view, or delete Tasks attached to the Customer (see Tasks).

- **Item Visualizer** - Displays recently purchased items and items on the Customer's Wish List (see Item Visualizer).

- **Update Customer Image** - Upload a new image for the Customer (see Update Customer Image).

- **Item Registry** - View the Customer Item Registries associated with the Customer (see Item Registry).

- **Item Registry Visualizer** - View the Items in an existing Customer Item Registry (see Item Registry Visualizer).

Customer Actions
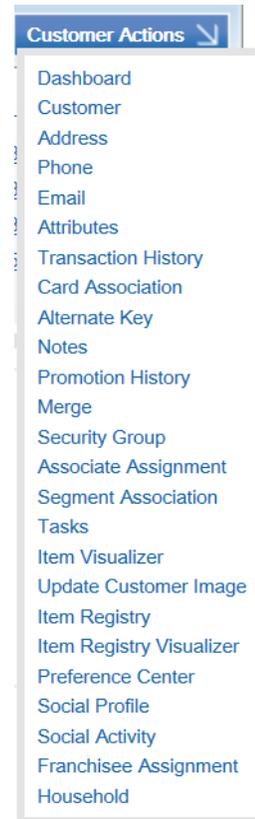
Dashboard
Customer
Address
Phone
Email
Attributes
Transaction History
Card Association
Alternate Key
Notes
Promotion History
Merge
Security Group
Associate Assignment
Segment Association
Tasks
Item Visualizer
Update Customer Image
Item Registry
Item Registry Visualizer
Preference Center
Social Profile
Social Activity
Franchisee Assignment
Household

- **Preference Center** - View the Preference Center settings for the Customer (see Preference Centers).

- **Social Profile** - View the Social Profiles associated with the Customer (see Social Profile).

- **Social Activity** - View the social media posts made by the Customer (see Social Activity).

- **Franchisee Assignment** - View or edit the Franchisees to whom the Customer has been assigned (see Franchisee Assignment).

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 Customer Engagement

- **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)

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

Open Card

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

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

A menu 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 page 1 in Chapter 15, "Card/Account Administration".

Customer Data

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

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 **WHOLESALER**	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.

Figure 2-10: Addresses Section

The Addresses section contains the following information for each address.

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

Email

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

Figure 2-11: Email Section

The Email section contains the following information for each email:

- **Email** - The Email address.
- **Type** - The Type of email address.
- **Primary** - Indicates whether the email is the primary email for the Customer.

- **Yes** - The email is the primary email address.

- **No** - The email is not the primary email address.

- **User Label** - User Label for the email address.

- **Contact Permission/Opt In** - The contact permission rule for the email address.

- **Format Preference** - The preferred format of the emails.

Telephone Numbers

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

Telephone Numbers edit				
Phone Number	Type	Primary	User Label	Contact Permission/Opt In
5085550100	HOME	Yes	home	orderinfo

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.

Customer Attributes edit			
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 edit
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.

Cards / Accounts

Card xxxxxxxxxxxx8995 (Active)

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.

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 when the note was created.

Customer notes can be created through the [Promotion Response Data Import](#). These note Types are EMAIL_SENT, EMAIL_FAILED, EMAIL_CLICKED, and EMAIL_OPENED. Each of these notes indicate the CAMPAIGN_ID, PROMOTION_ID, and EVENT_TYPE_ID. For an EVENT_CLICKED Note, the OFFER_NAME, OFFER_NUMBER, OFFER_CATEGORY, and OFFER_URL are also indicated.

Click Edit to work with Customer Notes, or select Notes from the Action Menu. See [Customer Notes](#) for more information.

Segment Association

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

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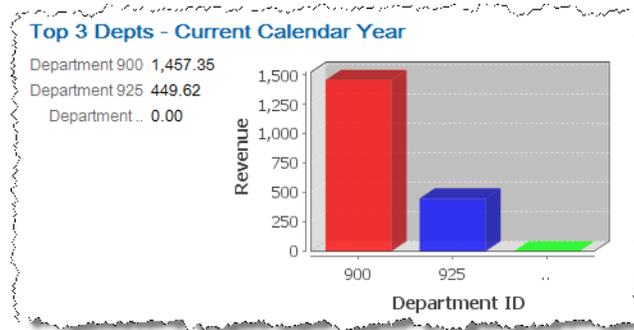
Figure 2-18: Top 3 Depts - Current Calendar Year

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.
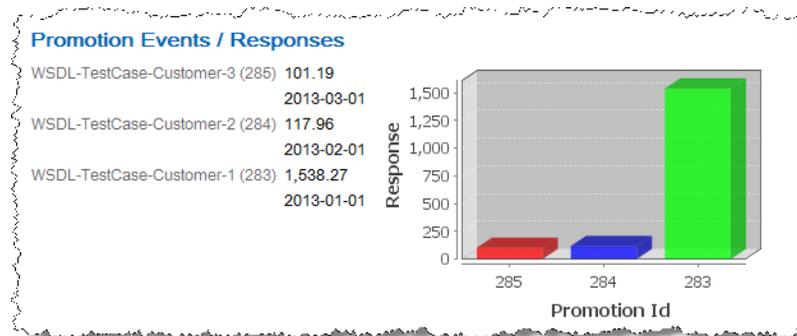
Figure 2-19: Promotion Events/Responses

Preference Centers

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

Figure 2-20: Preference Centers Section

The following information is displayed for each Preference Center:

- **Preference Center** - Name of the Preference Center. This is displayed only for the first channel in a Preference Center.

- **Channels** - The communication channel.

- **Opt In** - Indicates whether the Customer has opted to be contacted through the channel. If there is a check mark ( ) in the field, the Customer will be contacted through the channel.

- **Frequency** - The frequency at which the Customer will be contacted through the channel.

- **Customer Authorization** - Name of the file in which the Customer authorized communication.

- **Comm Last Sent Date** - Last date on which the Customer was sent a communication via the channel.

- **Updated Date/Time** - Date and time the channel was last updated.

- **Updated By** - ID of the User who last updated the channel.

Social Profile

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

Figure 2-21: Social Profile Section

The following information is displayed for each Social Network:

- **Social Media Type** - An icon indicating the social media network associated with the Social Profile.

- **Profile Name** - Name of the social profile.

- **Profile** - Image representing the customer on the social network.

- **Exp. Date** - Date the token associated with the network expires.

Franchisee Assignments

The Franchisee Assignments Section displays information about the Franchisees to whom the Customer has been assigned.
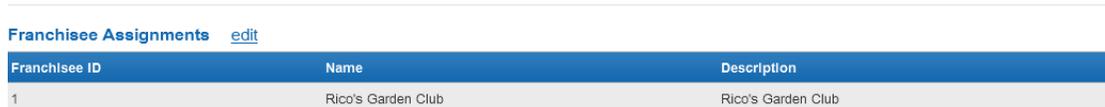
Figure 2-22: Franchisee Assignment Section

The following information is displayed for each Franchisee Assignment:

- **Franchisee ID** - ID of the Franchisee.

- **Name** - Name of the Franchisee.

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

Edit/View Customer Record

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

Customer Information

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

Figure 2-23: Edit Customer Information Page

This page 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 Oracle Retail Customer Engagement Cloud Services Implementation 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 Oracle Retail Customer Engagement Cloud Services Implementation 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 page 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 page opens.

2. Make the necessary changes to the fields. See Customer Information for more information about the fields.

   Tip: To change the Owner for the Customer, perform the procedure Search for New Owner.

   ---

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 page, or close the tab.

Search for New Owner

To add or change the Owner for a Customer:

   Important: 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 page, 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 criterion, click the **Add** button, then repeat steps 2-4 in the new search criteria fields.

   - To delete an unneeded set of search criteria fields click the **Delete** button for the search criteria.

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

   The search results are displayed in a List.

Figure 2-25: Search User - Search Results

7. Do one of the following:

   - To add an Owner ID, click to select a User, then click the **OK** button. Customer Engagement returns to the Customer Information page 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 page 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 page. The ID for the owner is removed from the **Owner ID** field.

Create a Customer

To create a new Customer in Customer Engagement:

1. Do one of the following:

   - In the <u>Customer Lookup/Edit</u> page, click the **Add** button.

   - In the <u>Customer List</u>, click **Add Customer** in the <u>Actions Menu</u>.

   The <u>Customer Information</u> page opens with the fields blank.

2. Enter the necessary information into the fields. See <u>Customer Information</u> for more information.

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

   To discard the changes, use the <u>Customer Actions Menu</u> to navigate away from the <u>Customer Information</u> page, or close the tab.

Address

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

   - Click **Address** in the <u>Customer Actions Menu</u>.

   - Click the **edit** <u>Link</u> in the Addresses section of the Customer Dashboard.

The Address page opens.

Figure 2-26: Address Page

Address Page

The Address page contains the following information:

- The <u>Customer Basics</u> area.

- An Address <u>List</u> displaying the following information for each address:

  - **Primary** - Indicates whether the address is the primary address for the Customer.

    * **Yes** - The address is the primary address.

    * **No** - The address is not the primary address.

  - **Address Seq** - The order in which the address was added to the Customer record.

  - **Address Type** - The Type of address.

  - **Address Line 1** - The first line of the Customer address.

  - **City** - The address city.

  - **State** - The address state or province.

  - **Postal Code** - The Postal Code or ZIP Code for the address.

  - **Contact Permission/Opt In** - The contact permission set for the address.

Address Detail Window

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

Figure 2-27: Address Detail Window

The Address Detail [Window](#) contains the following fields:

- **Create User Id** - ID of the User who created the address. *This field cannot be edited.*

- **Create Date** - Date on which the address was created. *This field cannot be edited.*

- **Update User Id** - Employee ID of the last user to update the address. *This field cannot be edited.*

- **Update Date** - Last date on which the address was updated. *This field cannot be edited.*

- **User Label** - **[OPTIONAL]** User Label for the Customer.

- **Address Line 1** - **[OPTIONAL]** First line of the Customer's address.

- **Address Line 2** - **[OPTIONAL]** Second line of the Customer's address.

- **Address Line 3** - **[OPTIONAL]** Third line of the Customer's address.

- **Address Line 4** - **[OPTIONAL]** Fourth line of the Customer's address.

- **Apartment** - **[OPTIONAL]** Apartment number.

- **Contact Permission/Opt In** - **[OPTIONAL]** Indicates the contact permissions for this address.

- **City** - **[OPTIONAL]** Customer city.

- **County** - **[OPTIONAL]** County of the Customer.

- **State** - **[OPTIONAL]** State or province code for the Customer.

- **Country** - **[OPTIONAL]** Country code for the Customer.

- **Postal Code** - **[OPTIONAL]** Postal Code (ZIP Code) for the Customer.

- **Address Type** - **[REQUIRED]** The type of address.

- **Primary** - Indicates whether the address is the primary address. *This field is edited through the Set Primary [Check Box](#) (see below).*

- **Set Primary** - Select this option to make the address the primary address for the Customer; this option is only available if the address is not the primary address.

Edit an Address

To edit an existing address in a Customer record:

1. In the <u>Address</u> page, click the Address to edit.

    The Address opens in an <u>Address Detail Window</u>.

2. Modify the Address (see <u>Address Detail Window</u> for more information).

3. Click **Save** to save the changes and close the <u>Address Detail Window</u>.

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

Add an Address

To add a new address into a Customer record:

1. In the <u>Address</u> page, click the **Add Address** button.

    An <u>Address Detail Window</u> opens with all of the fields blank.

2. Enter the Address information (see <u>Address Detail Window</u> for more information).

3. Click **Save** to save the changes and close the <u>Address Detail Window</u>.

    To close the <u>Address Detail Window</u> without saving the changes, click the **X** () in the top-right corner of the <u>Window</u>.

Delete an Address

To delete an address from a Customer record:

1. In the <u>Address</u> page, click the Address to delete.

    The Address displays in an <u>Address Detail Window</u>.

2. Click **Delete** to delete the address and close the <u>Address Detail Window</u>.

    > **Important:** Customer Engagement 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 <u>Window</u> without deleting, click the **X** () in the top-right corner of the <u>Window</u>.

Telephone Number

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

To access the Telephone Number page, do one of the following:

-   Click **Phone** in the <u>Customer Actions Menu</u>.

-   Click the **edit** <u>Link</u> in the Phones section of the Customer Dashboard.

The Telephone Number page opens.

Figure 2-28: Telephone Numbers Page

Telephone Number Page

The Telephone Number page 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. Customer Engagement 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.

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

- **Contact Permission/Opt In** - [OPTIONAL] Determines the contact permission for the telephone number.

- **Primary** - Indicates whether the telephone number is the primary telephone number. *This field is edited through the Set Primary Check Box (see below).*

- **Set Primary** - Select this option to make the telephone number the primary telephone number for the Customer; this option is only available if the phone is not the primary telephone number.

Edit a Telephone Number

To edit an existing Telephone Number in a Customer record:

1. In the Telephone Number page, 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 page, 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.

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

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

Email

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

To access the Email page, 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 page opens.

Figure 2-30: Email Page

Email Page

The Email page 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. Customer Engagement includes the following basic types:

  - **BUSINESS** - Business email for the Customer.

  - **HOME** - Home email for the Customer.

    Note: 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 page, 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 page, 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.

> **Important:** Customer Engagement 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 page enables users to add, update, or delete attributes associated with a Customer.

To access the Attributes page, 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 page opens.

Figure 2-32: Attributes Page

Attributes Page

The Attributes Page contains the following information:

• The Customer Basics area.

• A List of attributes containing the following information for each Attribute:

- **Group** - The group associated with the Attribute.

- **Name** - The name of the Attribute.

- **Description** - A description of the Attribute.

- **Value** - The value of the Attribute.

- **Data Type** - The type of data contained in the Attribute value.

- **Unique** - Indicates whether this Attribute can only be set once for each Customer.

    * **Yes** - This Attribute can only be set once for each Customer.

    * **No** - This Attribute can be set multiple times for each Customer.

- **Editable** - Indicates the permissions required for a User to edit this Attribute value in a Customer record.

    * **Yes** - This Attribute can edited by any User with permission to edit Customer records.

    * **No** - This Attribute can only be edited by a User with system administration permissions.

- **OpenAccess** - Indicates whether there is Open Access to this Attribute.

    * **Yes** - This Attribute has Open Access.

    * **No** - This Attribute does not have Open Access.

Attribute Detail Window

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

Figure 2-33: Attribute Detail Window

The Attribute Detail <u>Window</u> 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 <u>Window</u> 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 <u>Attribute Detail Window</u>.

2. Make changes to the Attribute.

3. Click **Save** to save the changes and close the <u>Attribute Detail Window</u>.

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

Delete an Attribute

To delete an attribute from a Customer record:

1. In the <u>Attributes</u> page, click the Attribute to edit.

   The Attribute opens in an <u>Attribute Detail Window</u>.

2. Click **Delete** to delete the Attribute and close the <u>Attribute Detail Window</u>.

   > **Important:** Customer Engagement 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 <u>Window</u> without deleting, click the **X** (⊠) in the top-right corner of the <u>Window</u>.

Transaction History

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

To View a Customer's Transaction History, click **Transaction History** in the <u>Customer Actions Menu</u>.

The Transaction History page opens.

Figure 2-34: Transaction History Page

Transaction History Page

The Transaction History Page contains the following information:

• The <u>Customer Basics</u> 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. Displaying latest 26 of 26 transactions								
Location ⇕	Register ⇕	Business Date ⇕	Transaction ⇕	Cashier ⇕	Status ⇕	Total ⇕	Void ⇕	Points Earned ⇕
99901	1	2015-09-17	36820003	100	DELIVERED	465.78		200
99901	1	2015-09-17	36820002	100	DELIVERED	660.58		300

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.

- **Void** - Set to Yes if the transaction has been voided.

- **Points Earned** - The total points earned, for all items on the transaction, through the associated Loyalty program.

  Includes a decimal based on the Points Decimal Precision defined for the Loyalty Program; for example, if the Points Decimal Precision is 2, the points earned might be 12.34, while if the Points Decimal Precision is 0, the points earned might be 12. A negative number indicates that points were lost, such as when a return was processed.

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. See above for an illustration.

Transaction Detail Window

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

Figure 2-36: 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.

    - **true** - The transaction was voided.

    - **false** - 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.

- **Points Earned** - The total points earned, for all items on the transaction, through the associated Loyalty program.

  Includes a decimal based on the Points Decimal Precision defined for the Loyalty Program; for example, if the Points Decimal Precision is 2, the points earned might be 12.34, while if the Points Decimal Precision is 0, the points earned might be 12. A negative number indicates that points were lost, such as when a return was processed.

- **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 2-37: 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.

- **Points Earned** - The points earned through the associated Loyalty program.

  Includes a decimal based on the Points Decimal Precision defined for the Loyalty Program; for example, if the Points Decimal Precision is 2, the points earned might be 12.34, while if the Points Decimal Precision is 0, the points earned might be 12. A negative number indicates that points were lost, such as when a return was processed.

Item Details Window

Click an Item Code in the Transaction Detail Window to open this window. The Item Details Window displays the following information for an Item:
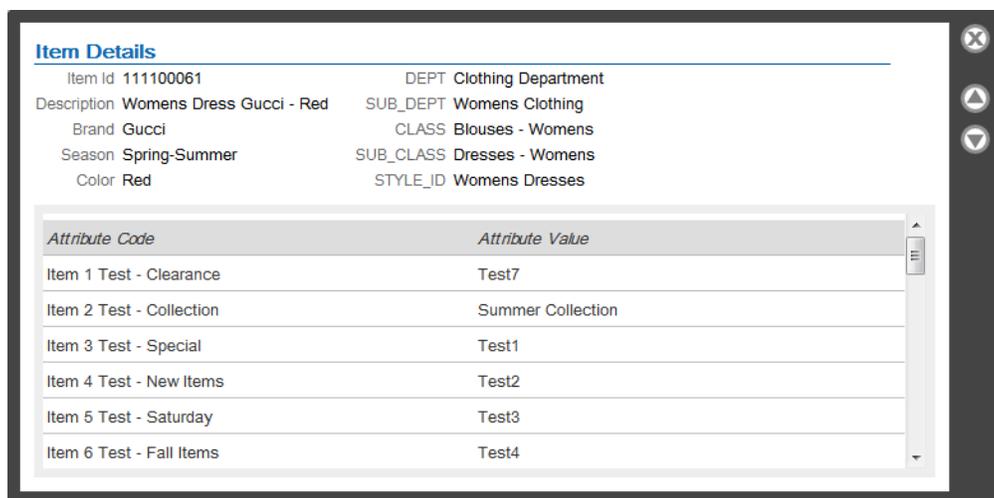
Figure 2-38: Item Details Window

- **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:

> **Note:** This section is displayed only if the Show Tender and Tax [Check Box](#) is checked.

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

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

Tender Line Items

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

> **Note:** This section is displayed only if the Show Tender and Tax [Check Box](#) is checked.

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

Card Association

The Card Association page 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 page, click **Card Association** in the Customer Actions Menu. The Card Association page opens.

Figure 2-39: Card Association Page

Card Association Page

The Card Association Page 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 <u>Window</u>, perform the procedure <u>Card Search</u>.
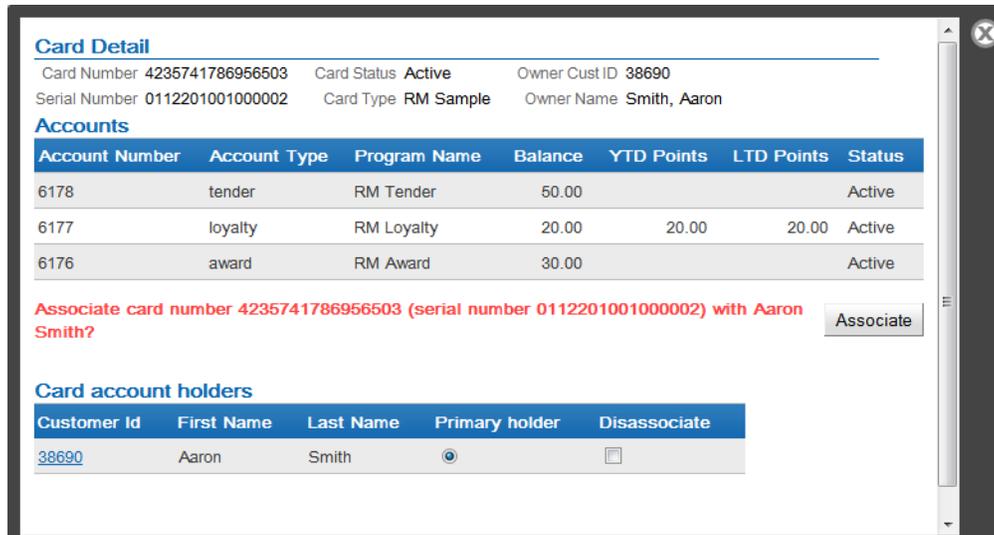
Figure 2-40: Card Detail Window

The Card Detail <u>Window</u> 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 <u>List</u> of accounts attached to the Card. The following information is displayed for each account in the <u>List</u>:

  - **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 <u>List</u> of Customers associated with the Card. The following information is displayed for each Customer in the <u>List</u>:

  - **Customer Id** - ID of the Customer.

  - **First Name** - Customer first name.

  - **Last Name** - Customer last name.

  - **Primary holder** - <u>Radio Buttons</u> 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).

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).

Card Search

To search for a Card through the Card Association page:

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.

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

2. Click **Search**.

    - If a Card matching the search criteria is found, the Card will be opened in the Card Detail Window.
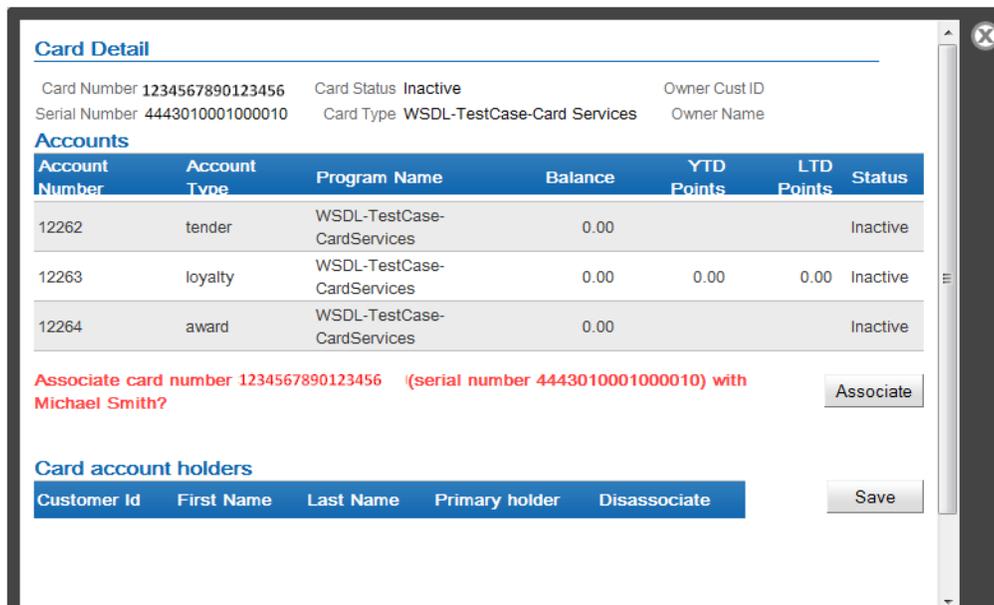
Figure 2-41: Card Detail Window

    - If no Card is found that matches the search criteria, an error message will be displayed at the top of the page.
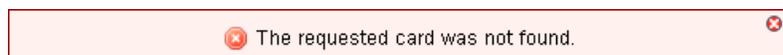
Figure 2-42: Requested Card Not Found Error

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 2-43: 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.

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

    ---

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

    A confirmation prompt opens. Continue with the next step.

Figure 2-44: 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 page 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.
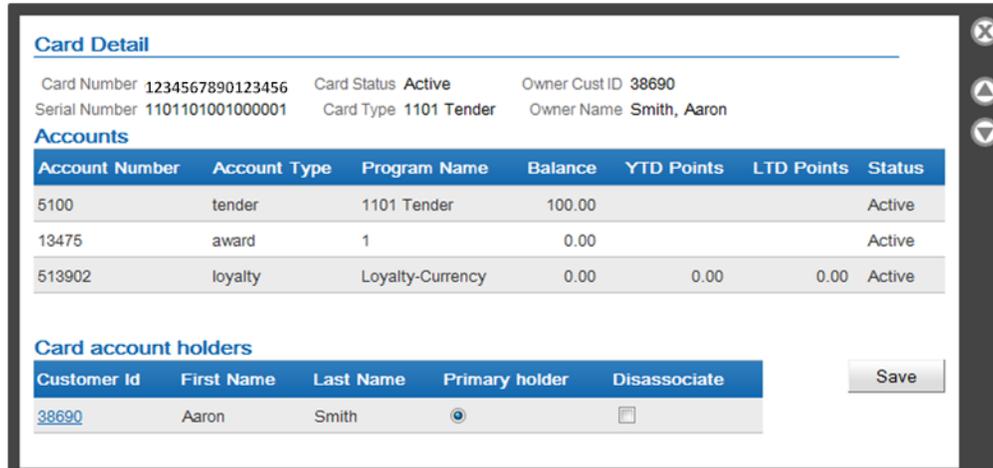
Figure 2-45: Card Detail Window

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.
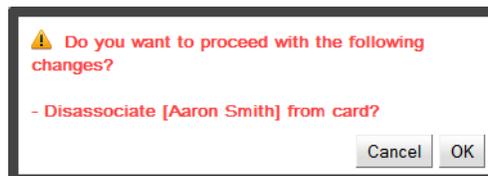
Figure 2-46: Disassociate Card Confirmation Prompt

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 page for a Customer currently associated with the Card, click the Card that is being changed.

The Card opens in a Card Detail <u>Window</u>.

Figure 2-47: Card Detail Window

2. Use the **Primary holder** <u>Radio Buttons</u> to select the Customer to set as the primary cardholder.

3. Click the **Save** button.

A confirmation prompt opens.

Figure 2-48: Change Primary Cardholder Confirmation Prompt

To return to the Card Detail <u>Window</u> without saving the change, click **Cancel**.

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

Alternate Keys

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

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

- Click **Alternate Key** in the <u>Customer Actions Menu</u>.

- Click the **edit** <u>Link</u> in the Alternate Key section of the Customer Dashboard.

The Alternate Keys page opens.

Figure 2-49: Alternate Key Page

Alternate Keys Page

The Alternate Keys Page 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.
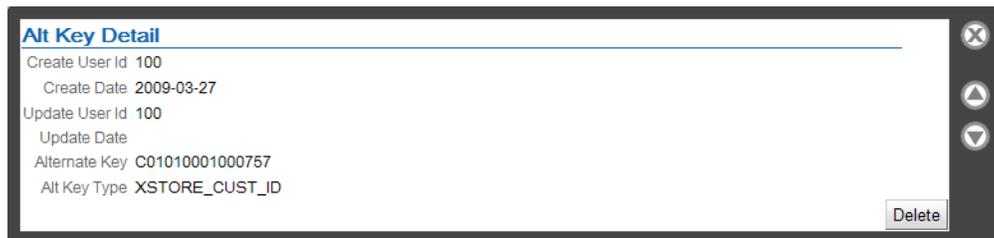
Figure 2-50: Alt Key Detail Window

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 <u>Alternate Keys</u> page, click the **Add Alt Key** button in the top-right corner of the page.

2. An <u>Alt Key Detail Window</u> opens.

Figure 2-51: 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** <u>Selection Menu</u>.

5. Click the **Save** button.

   The Alternate Key is added to the Alternate Key <u>List</u> and the <u>Alt Key Detail Window</u> closes.

Delete an Alt Key

To delete an Alternate Key from a Customer record:

1. In the <u>Alternate Keys</u> page, click the Alternate Key to delete.

   The Alternate Key is opened in an <u>Alt Key Detail Window</u>.

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

   > **Important:** Customer Engagement 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 <u>Window</u> without deleting, click the **X** (⊠) in the top-right corner of the <u>Window</u>.

Customer Notes

The Customer Notes page allows Users to view, edit, add, or delete Customer Notes.

Selecting the Private Flag for a Note prevents anyone from viewing, changing, or deleting the note except for the User who created the Note, or a System Administrator.

Notes that are created automatically by the system cannot be edited or deleted. These Notes are identifiable by a Note Type beginning with EVT, such as EVT_ACTIVATE_CARD. Also, you cannot assign one of these Note Types to a Note created by a User.

To access the Customer Notes page, click **Notes** in the Customer Actions Menu, or select **Edit** above Customer Notes at the Customer Dashboard. The Customer Notes page opens.

Figure 2-52: Customer Notes Page

Customer Notes Page

The Customer Notes Page 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 the *Oracle Retail Customer Engagement Cloud Services Implementation 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. The ID can also identify a process that created the record, such as DuplicateMerge, or the User may be blank for a Note created through a system event, such as EVT_ACTIVATE_CARD.

- **Location** - The ID of the location where the Note was created.

- **Note Type** - The type of Note.

  Customer Notes can be created through the [Promotion Response Data Import](). These Note Types are EMAIL_SENT, EMAIL_FAILED, EMAIL_CLICKED, and EMAIL_OPENED. Each of these notes indicate the CAMPAIGN_ID, PROMOTION_ID, and EVENT_TYPE_ID. For an EVENT_CLICKED Note, the OFFER_NAME, OFFER_NUMBER, OFFER_CATEGORY, and OFFER_URL are also indicated.

  Notes can also be created automatically by the system. These Notes are identifiable by a Note Type beginning with EVT, such as EVT_ACTIVATE_CARD. Also, you cannot assign one of these Note Types to a Note created by a User.

  Users can also create Notes for a Customer. Users have the option to edit or delete these Notes, as well as flagging Notes as private.

- **Note** - The content of the note, or the initial characters in the contents, if they exceed the alloted space.

  Contents of the Note are masked (displayed as a series of asterisks (*****)) and options are disabled if:

  * The User does not have sufficient role-based authority and is not an Associate assigned to the Customer.

  * The Note is flagged as Private and the User is not the creator of the Note or a System Administrator.

  See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information on authority rules and hierarchy.

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 2-53: Add Customer Note Window

2. Optionally, select the Private Flag to prevent other Users without sufficient authority from reading the contents of the Note. Other Users will still be able to read the

creation Date, the User who created the Note, the Location where the Note was created, and the Note Type.

3. Select the **Note Type** in the Selection Menu.

4. In the **Note** Text Field, enter the text of the note.

5. Click the **Add** button.

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

Edit, View, or Delete a Customer Note

To edit, view, or delete a Customer Note for a Customer record:

1. Click the Note.
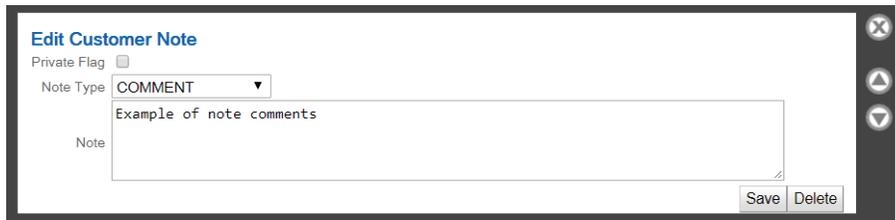
    The Edit Customer Note Window opens.

Figure 2-54: Edit Customer Note Window (Edit Authority)

-   To edit the Note, change the setting of the Private Flag or the Note Type, or edit the Note contents, and click Save. See Add a Customer Note, above, for more information on these fields.

-   To delete the Note, click Delete.

2. The Edit Customer Note Window closes and the Note is updated or deleted.

Contents of the Note are masked (displayed as a series of asterisks (*****)) and options are disabled if:

•   The User does not have sufficient role-based authority and is not an Associate assigned to the Customer.

•   The Note is flagged as Private and the User is not the creator of the Note or a System Administrator.

Figure 2-55: Edit Customer Note Window (Masked)

Also, options are disabled if the Note was created through a System event. In this case, the Note comments are not masked.
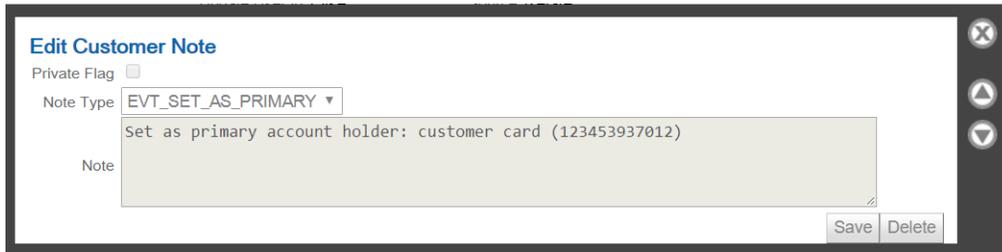
Figure 2-56: Edit Customer Note Window (System Event)

See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information on authority rules and hierarchy.

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 page. Promotion History cannot be viewed on the Customer Dashboard.

To open the Promotion History page, click **Promotion History** in the Customer Actions Menu. The Promotion History Page opens, providing access to the Promotion History Search functionality.

Figure 2-57: Promotion History Page

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 Page.

Figure 2-58: Promotion History Search Results

Promotion History Page

The Promotion History Page includes the following fields:

Figure 2-59: Promotion History Page With Search Results

- The [Customer Basics](#) area.

- A Promotion History Search area containing the following fields:

    > **Note:** 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 Page 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:

Note: The number of Promotions displayed in the List depends upon a Customer Engagement configuration. For more information see the *Oracle Retail Customer Engagement Cloud Services Implementation Guide*.

---

* **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 page, click **Merge** in the Customer Actions Menu. The Customer Merge Page opens.

Figure 2-60: Customer Merge Page

Customer Merge Page

The Customer Merge page 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 Page.

    A Build Duplicate Customer List Window opens.
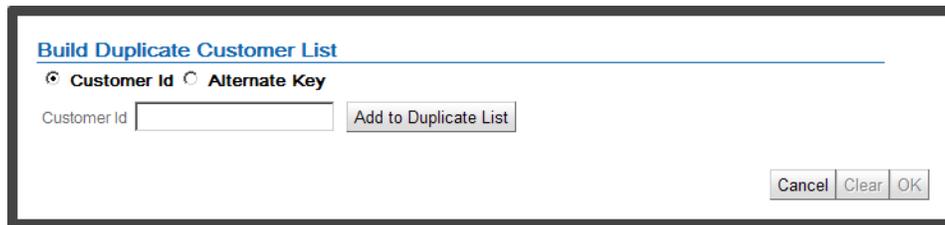
Figure 2-61: Build Duplicate Customer List

2. Use the Radio Buttons to select the method to use when searching for Customers.

    -   If **Customer Id** is selected, continue with step 3.

    -   If **Alternate Key** is selected, continue with step 4.

3. Enter the **Customer Id** for the Customer to add to the List.

    Continue with step 6.

4. In the **Alt Key Type** Selection Menu, select the Alternate Key to use for the search.
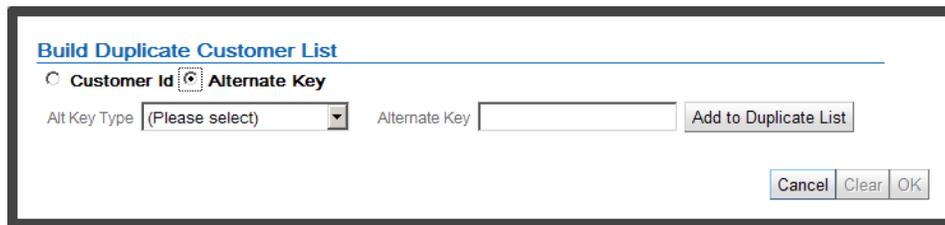
Figure 2-62: Alternate Key Search

5. In the **Alternate Key** field, enter the value to search for in the Alternate Key.

6. Click **Add to Duplicate List**.

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

Figure 2-63: 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.

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

A **Delete** Link opens. Delete

2. Click **Delete**.

The Customer is removed from the Duplicates List.

Merge Customers

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

| Duplicates | | | | | | | | |
Make Source	ID	Name	Address	City	State	Postal Code	Phone	Email
⦿	310751	Gloria Mundi	1234 SAMPLE STREET	WORCESTER	MA	01602	5085550100	gmundi@example.com
○	355609	James Madison	12345 EXAMPLE STREET	WORCESTER	MA	01605	5085550100	jmadison@example.com

Figure 2-64: 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 Page.

   A confirmation prompt opens.

⚠ You are about to merge customer records. Do you really want to do this?
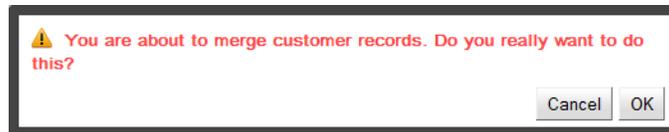
Cancel   OK

Figure 2-65: Merge Customers Confirmation Prompt

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

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

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

✓ Successfully merged customer records. New customer id: 355615
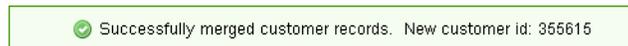
Figure 2-66: Successful Customer Merge Message

Household

Households identify Customers who share the same primary home address. The Household Identification job creates the Household association between two or more Customers. This job provides the option to create a Household association based only on matching primary home address, or based on both matching primary home address plus matching last name. The Household Identification job assigns a Household key to customers who match based on the selected criteria.

To open the Household page, click **Household** in the Customer Actions Menu. The Security Groups Page opens.

Figure 2-67: Household Page

Household Page

The Household Page contains the following information:

• The Customer Basics area.

• A List of Customers, including the displayed Customer, assigned to the same Household, containing the following information for each Customer in the Household:

- **Customer Id** - ID of the Customer.

- **First Name** - First Name of the Customer.

- **Last Name** - Last Name of the Customer.

- **Total Sales Amt** - Total amount of all sales associated with the Customer.

- **Total Transaction Count** - Total number of transactions associated with the Customer.

- **YTD Sales Amt** - Amount of all sales associated with the Customer during the year to date.

- **YTD Transaction Count** - Number of transactions, during the year to date, associated with the Customer

Click any Customer for the Household to open the Customer Summary Window for that Customer.

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 page, click **Security Group** in the Customer Actions Menu. The Security Groups Page opens.

Figure 2-68: Security Groups Page

Security Group Rules

Security Groups are used to determine the information that Users can access for specific Customers. The Default View Where No Security Group is Assigned property and the Default View Where User is Not Assigned to a Security Group property control the Security Group logic. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information and procedures for managing Users in Security Groups.

Table 0-1 Security Group Rules

If...	Then...
No Security Group has been applied to a Customer.	The setting of the Default View Where No Security Group is Assigned property applies, regardless of whether the User is assigned to a Security Group. For example, if the Default View Where No Security Group is Assigned property is set to Read/Write, and no Security Group has been applied to the Customer, all users have Read/Write access.
• 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; otherwise, the Default View Where User is Not Assigned to a Security Group setting applies. For example, a Read Only Security Group is applied to a Customer, and the Default View Where User is Not Assigned to a Security Group is set to Limited Read. If the User is also assigned to a Read Only Security Group, the User has Read Only Access to the Customer; otherwise, the Default View Where User is Not Assigned to a Security Group setting of Limited Read applies.

Table 0-1 Security Group Rules (continued)

If...	Then...
• More than one Security Group has been applied to a Customer. -and- • The current User belongs to any of those Security Groups.	The User will have the **highest level of permissions** given by those Security Groups. For example, a Read/Write Security Group and a Read Only Security Group are applied to a Customer. A User is assigned to a Read Only Security Group and a Limited Access Security Group. The Read Only Security Group setting applies.
• One or more Security Groups are applied to a Customer. -and- • The current User is not a member any Security Group applied to the Customer.	the Default View Where User is Not Assigned to a Security Group setting of Limited Read applies. For example, a Read Only Security Group is applied to the Customer, and the User is not assigned to that Security Group. The Default View Where User is Not Assigned to a Security Group property is set to Limited Read. The Limited Read setting applies.

Regardless of the Security Group assignments for the Customer or the User, the following rules apply:

The owner or creator of a Customer record will always have full Read/Write access to that Customer's information. See Customer Information for more information about Customer record owners.

• A User with an Associate Assignment Role for a customer will have full read/write access to that Customer's information.

• A User with the SystemAdmin Roles will always have full read/write access to any and all Customers.

• A franchise User with the FranchiseeAdmin Role will always have full read/write access to a Customer assigned to that franchise.

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 Page

The Security Groups Page 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 Page. The Security Group Detail Window opens.
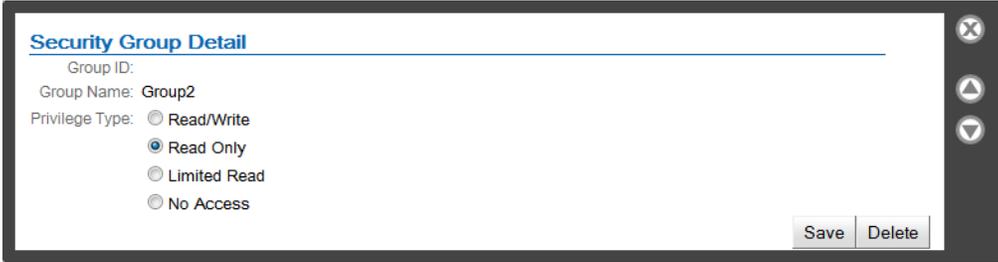
Figure 2-69: Security Group Detail Window

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.

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 Page.

    A Security Group Detail Window opens.

Figure 2-70: 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 page enables users to add, update, or delete associate assignments for a customer. To access the Associate Assignments page, 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 page opens:

Figure 2-71: Associate Assignments Page

Associate Assignments Page

The Associate Assignments page 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 the *Oracle Retail Customer Engagement Cloud Services Implementation 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.

  - **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 2-72: Associate Assignment Detail Window

The Associate Assignment Detail Window displays the following information:

- **Role** - Associate Role. See the *Customer Engagement Implementation 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.

- **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 <u>Associate Assignments Page</u>, click the Associate Assignment to edit.

    The Associate Assignment is opened in an <u>Associate Assignment Detail Window</u>.

2. Click the **Search Associate** <u>Link</u>.

    A Search Associate <u>Window</u> opens.

Figure 2-73: Search Associate Window

3. Use the **Location** <u>Selection Menu</u> to select the Location where the new Associate is located.

    The <u>List</u> 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 <u>Window</u> without saving.

    The Search Associate <u>Window</u> closes and Customer Engagement returns to the Associate Assignment Detail <u>Window</u>.

6. Click **Save** to save the changes and close the Associate Assignment Detail <u>Window</u>.

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

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 <u>Associate Assignments Page</u>, click the Associate Assignment to edit.

The Associate Assignment is opened in an <u>Associate Assignment Detail Window</u>.

2. Click the **Locked** <u>Check Box</u> 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 <u>Associate Assignment Detail Window</u>.

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

Delete Assigned Associate

To delete an Associate Assignment from a Customer:

1. In the <u>Associate Assignments Page</u>, click the Associate Assignment to edit.

The Associate Assignment is opened in an <u>Associate Assignment Detail Window</u>.

2. Click the **Delete** Button.

The <u>Associate Assignment Detail Window</u> closes and the Associate is removed from the Associate Assignment.

Segment Association

Segment Association page 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 page, 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 Page opens.

Figure 2-74: Segment Association Page

Segment Association Page

The Segment Association Page 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 Page.

The Segment Detail <u>Window</u> displays the following information:
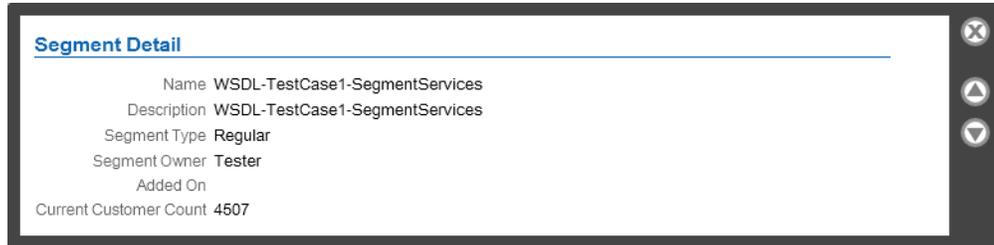
Figure 2-75: Segment Detail Window - Unstratified Segment

Figure 2-76: Segment Detail Window - Stratified Segment

Figure 2-77: Segment Detail Window - Manual Segment

The Segment Detail <u>Window</u> 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 <u>Window</u> 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 Page.

    A Segment Detail Window opens.
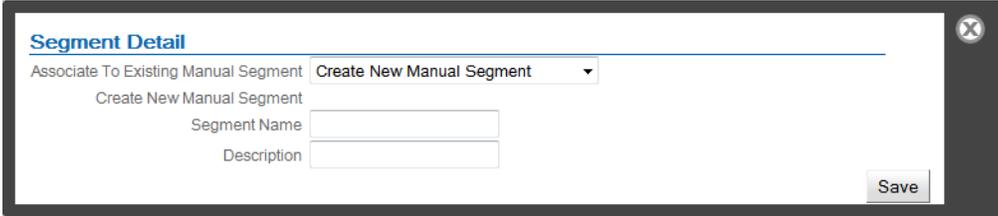
Figure 2-78: Create Segment Detail Window

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 Page, 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 Page for the Customer.

Tasks

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

To open the Tasks page, click **Tasks** in the Customer Actions Menu. The Tasks Page opens.

Figure 2-79: Tasks Page

Tasks Page

The Tasks page 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 the *Oracle Retail Customer Engagement Cloud Services Implementation 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 page, 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 Page List.

Open a Task

To open a Task, click the Task in the Tasks Page 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.

Add a Task

To add a Task, click the **Add Task** button in the upper right of the Tasks Page to open the Create a Task Window.

See Create a Task for the full procedure.

Item Visualizer

The Item Visualizer page displays the Items purchased by the Customer, and the Items that the Customer wishes to own.

> **Note:** This page does not display items added to a Wish List or Registry through the Customer Item Registry option. to display these items, use the Item Registry Visualizer page.

To open the Item Visualizer page, click **Item Visualizer** in the [Customer Actions Menu](#). The [Item Visualizer Page](#) opens.
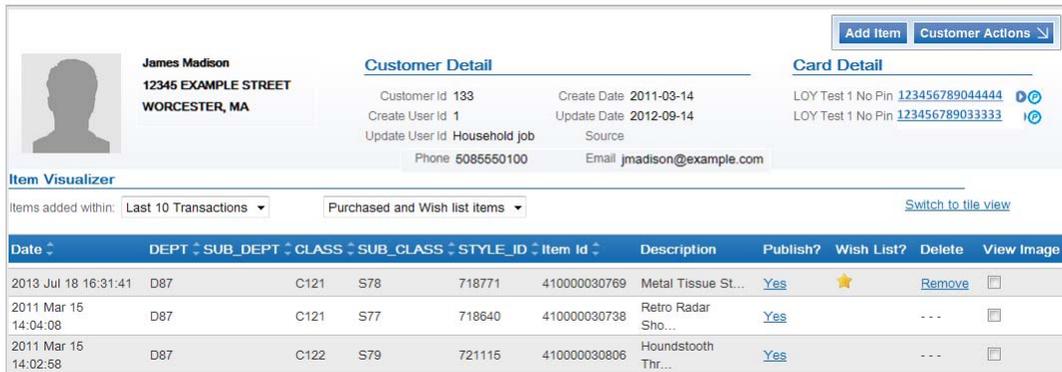
Figure 2-80: Item Visualizer Page

Item Visualizer Page

The Item Visualizer page has two formats: [List View](#) **[DEFAULT]** and [Tile View](#).

- Click **Switch to list view** to view the items in [List View](#).

- Click **Switch to tile view** to view the items in [Tile View](#).

List View

The Item Visualizer Page displays the following information in [List](#) View:
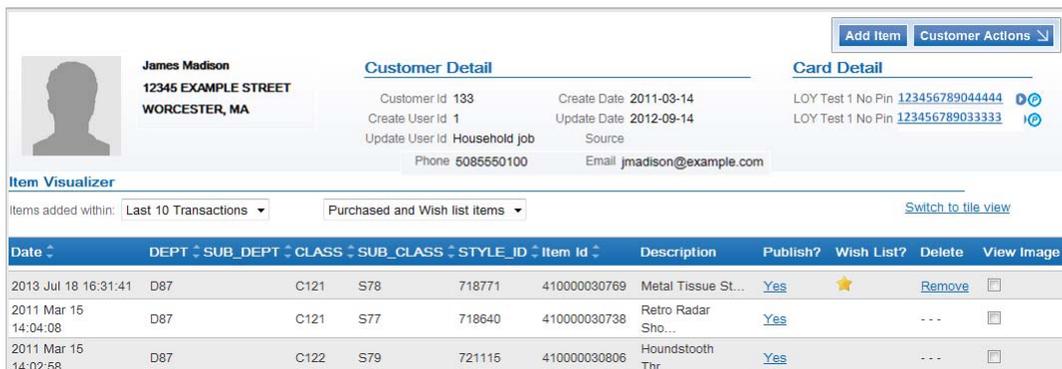
Figure 2-81: List View

- The [Customer Basics](#) area.

- Item [Filter](#) menus:

  - Date the Item was added to the Item Visualizer.

    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 <u>List</u>.

  This <u>Selection Menu</u> 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.

  Note: The term "Wish List" here does not refer to an Item Registry Wish List. The term here refers only to Items that the Customer has expressed an interest in, but does not indicate that the Item has been added to a Registry.

- A <u>List</u> of Items, containing the following information for each Item:

  - **Date** - Date the Item was added to the Item Visualizer.

  - **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 the *Oracle Retail Customer Engagement Cloud Services Implementation 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 <u>Link</u> 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 <u>Link</u> to remove the Item from the Wish List.

  Note: The term "Wish List" here does not refer to an Item Registry Wish List. The term here refers only to Items that the Customer has expressed an interest in, but does not indicate that the Item has been added to a Registry.

  - **View Image** - Indicates whether the Item will be shown in the Tile View.

Tile View

The Item Visualizer page displays the following information in Tile View:

Figure 2-82: Tile View

- The Customer Basics area.

- Selected Items in the Item Visualizer, 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.*

    Note: The term "Wish List" here does not refer to an Item Registry Wish List. The term here refers only to Items that the Customer has expressed an interest in, but does not indicate that the Item has been added to a Registry.

  - **Item ID** - ID of the Item.

  - **Description** - Description of the Item.

  - **Color** - Color of the item.

    Note: You cannot delete items from the Item Visualizer in Tile View.

Add Item to Wish List

To add an Item to the Wish List:

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

1. Click the **Add Item** button in the <u>Item Visualizer Page</u>.

   A <u>Window</u> opens for adding a Wish List Item.

Figure 2-83: Add Wish List Item Window

2. Use the **Filter Criteria** <u>Text Field</u> to enter the Item ID search criteria.

3. Click the **Search** button.

   A <u>List</u> of Items with an Item ID containing the search criteria is displayed.

Figure 2-84: 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 <u>Item Visualizer Page</u>.

   > **Note:** The term "Wish List" here does not refer to an Item Registry Wish List. The term here refers only to Items that the Customer has expressed an interest in, but does not indicate that the Item has been added to a Registry.

   Click the **Cancel** button to close the <u>Window</u> and return to the <u>Item Visualizer Page</u>.

Remove Wish List Item

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

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

> **Note:** The term "Wish List" here does not refer to an Item Registry Wish List. The term here refers only to Items that the Customer has expressed an interest in, but does not indicate that the Item has been added to a Registry.

Update Customer Image

In Customer Engagement, an image of a Customer can be displayed in the Customer page.

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.
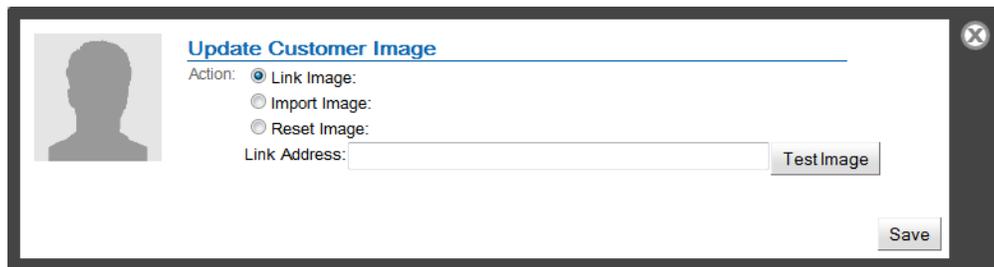
Figure 2-85: Update Customer Image Window

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 2-86: 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.
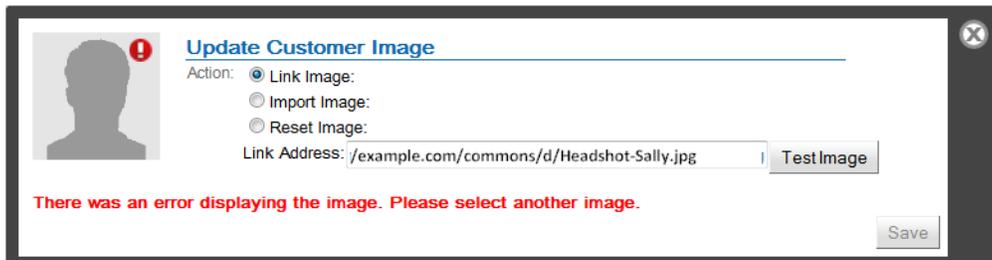
Figure 2-87: Error Displaying Image

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.
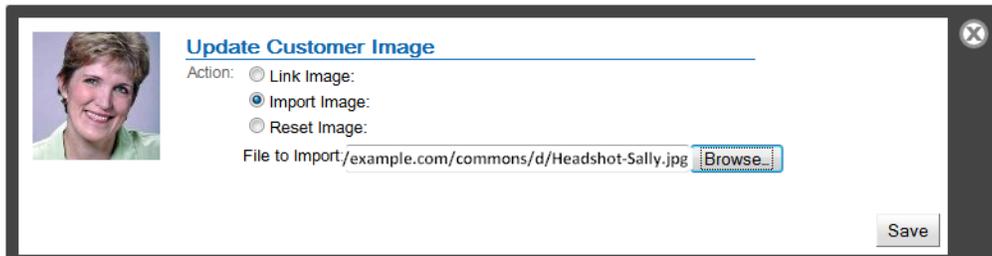
Figure 2-88: Import Image Displayed

If the image type is unsupported, the Window displays an error.

Figure 2-89: Image Type Unsupported
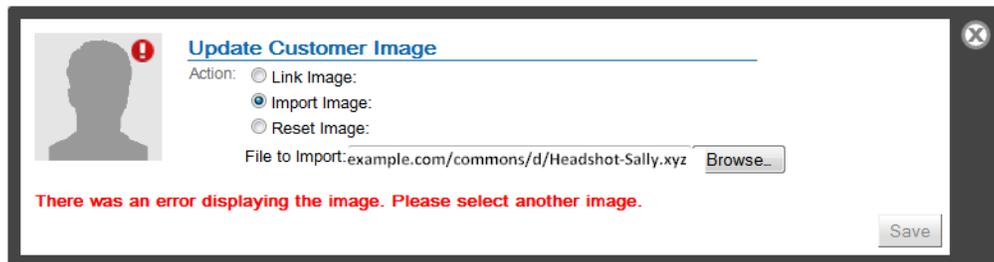
Figure 2-90: Image Display Error

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.

Item Registry

The Item Registry page displays information about the Customer Item Registries owned by the Customer.

This page is opened by clicking **Item Registry** in the Customer Actions Menu. The Item Registry Page opens.

Figure 2-91: Item Registry Page

The Item Registry Page displays the following information:

- The Customer Basics area.

- Item Registry Filter menus:

  - **Display** past or future events. This Selection Menu has the following options:

    * **All Events** - All events, both past and future, and all Wish Lists.

    * **Future Events** - [DEFAULT] Only display events that are happening in the future. Wish Lists are also displayed.

    * **Past Events** - Only display events that have already occurred. Wish Lists are not displayed.

- A List of Item 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, or indicates if the Registry is a Wish List.

  - **Event Date** - Date of the event. Blank for a Wish List.

  - **Venue Name** - Name of the venue. Blank for a Wish List.

  - **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 <u>Window</u> displays the following information:

Figure 2-92: 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, or indicates if the Registry is a Wish List.

- **Event Date** - Date of the event. Included only for a Gift Registry.

- **Expiration Date** - Date on which the Registry expires. Included only for a Gift Registry.

- **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 <u>List</u> 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. Included only for a Gift 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 Item Registry Print page.

- **Visualize** - Go to the Item Registry Visualizer for the Customer.
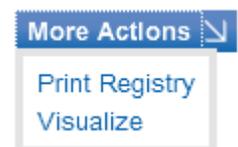
Create a New Item Registry

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

1. Click the **Add New Item Registry** button.

2. Update the Item Registry.

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

   - Use Wizard Navigation to move through the Item Registry and make any necessary changes.

   - Click **save** when you are finished making changes. The Item Registry will be saved and Customer Engagement will return to the Item Registry page.

- Click **cancel** to discard the changes and return to the Item Registry page.

Item Registry Visualizer

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

This page is opened by clicking **Item Registry Visualizer** in the Customer Actions Menu, or by clicking **Visualize** in the More Actions Menu for the Registry Information Window. The Item Registry Visualizer page opens.
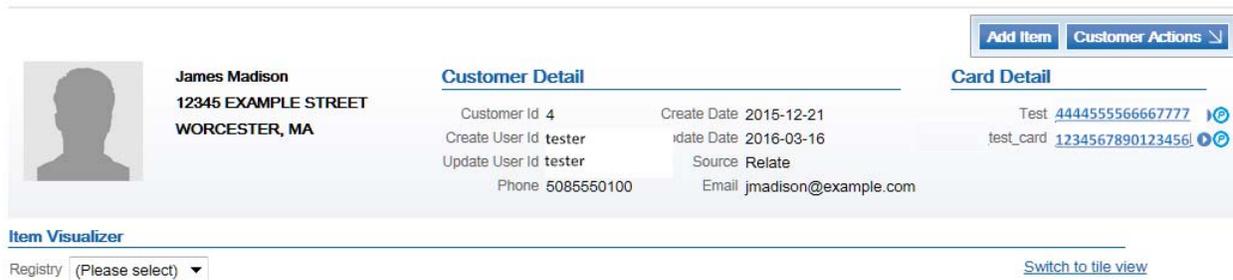
Figure 2-93: Item Registry Visualizer Page

View Registry Items

Use the **Registry** Selection Menu to select a Registry. A List containing the Items in the Registry opens. The following information is displayed for each Item:
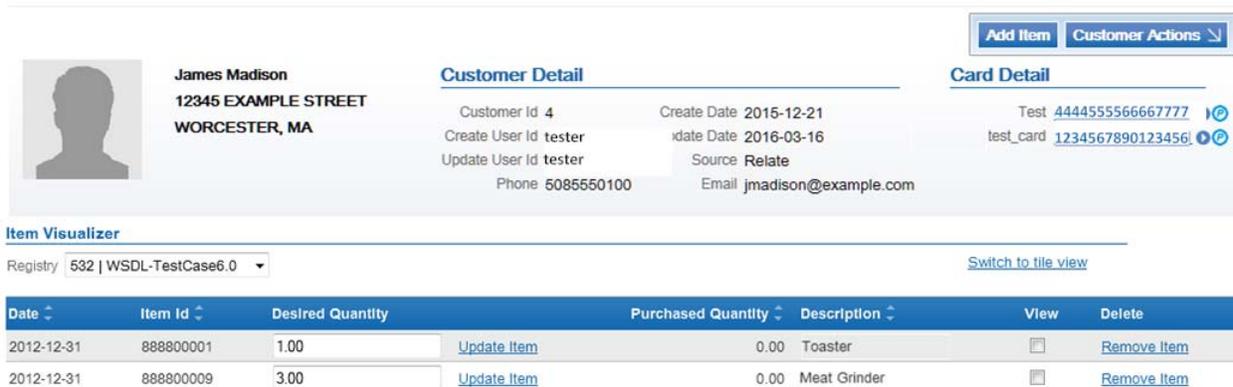
Figure 2-94: Item Registry Visualizer - Registry Selected

Item Registry Visualizer Page

The Item Registry Visualizer page has two formats: List View [DEFAULT] and Tile View.

- Click **Switch to list view** to view the Item Registry in List View.

- Click **Switch to tile view** to view the Item Registry in Tile View. Only Items that have the View option selected are displayed.

List View

The Item Visualizer displays the following information in List View:

Figure 2-95: Item Registry Visualizer Page - 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** - A Check Box indicating whether to display an image 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.

   > **Note:** You cannot change item quantities from the Registry while in Tile View.

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*.

> **Note:** You cannot delete items from the Registry while in Tile View.

Tile View

The Item Visualizer Page displays the following information in Tile View:

Figure 2-96: Item Registry Visualizer - Tile View

- The Customer Basics area.
- Selected Items in the Item Registry Visualizer page, 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 Item Registry Visualizer.

   An Item Search Window opens.

Figure 2-97: Item Search Window

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

3. Click the **Search** button.

A [List](#) of Items matching the search criteria is displayed.

Figure 2-98: Item Search Results

4. Click an Item to select it.

5. Click the **OK** button.

   An Item Quantity [Window](#) opens.

Figure 2-99: 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 page displays the contact preferences for a Customers.

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

- Click **Preference Center** in the <u>Customer Actions Menu</u>.

- Click the **edit** <u>Link</u> in the Preference Centers section of the Customer Dashboard.

The <u>Preference Centers Page</u> opens.

Figure 2-100: Preference Centers Page

Preference Centers Page

The Preference Centers page displays the following information:

- The <u>Customer Basics</u> area.

- A <u>List</u> of Preference Centers, displaying the following information for each Preference Center:

  - **Preference Center** - Name of the Preference Center. This is displayed only for the first channel in a Preference Center.

  - **Channels** - The communication channel.

  - **Opt In** - Indicates whether the Customer has opted to be contacted through the channel. If there is a check mark ( ) in the field, the Customer will be contacted through the channel.

  - **Frequency** - The frequency at which the Customer will be contacted through the channel.

  - **Customer Authorization** - Name of the file in which the Customer authorized communication.

  - **Comm Last Sent Date** - Last date on which the Customer was sent a communication via the channel.

  - **Updated Date/Time** - Date and time the channel was last updated.

  - **Updated By** - ID of the User who last updated the channel.

Preference Center Detail Window

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

The Preference Center Detail Window displays the following information:

- **Preference Type ID** - ID of the Preference Center type.

- **Preference Type** - Name of the Preference Center type.

- A List of Preference Center channels, displaying the following information for each Preference Center:

  - **Channels** - The communication channel.

  - **Opt In** - A Check Box determining whether the Customer has opted to be contacted through the channel. If there is a check mark (☑) in the field, the Customer will be contacted through the channel.

  - **Frequency** - A Selection Menu determining frequency at which the Customer will be contacted through the channel.

  - **Customer Authorization** - A Link to attach an authorization document and, if an authorization document has been uploaded, the name of the file in which the Customer authorized communication and a Link to remove the document.

  - **Comm Last Sent Date** - A Calendar Menu indicating the last date on which the Customer was sent a communication via the channel.

  - **Updated Date/Time** - Date and time the channel was last updated.

  - **Updated By** - ID of the User who last updated the channel.

Create a Preference Center

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

1. Click the **Add Preference** button on the Preference Centers page.

2. A blank Preference Center Detail Window opens.

Figure 2-101: 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 the *Oracle Retail Customer Engagement Cloud Services Implementation 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 <u>Preference Center Detail Window</u>.

2. Make the necessary changes to the Preference Center:

   - Use the **Opt In** <u>Check Box</u> 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** <u>Selection Menu</u> to define the frequency at which the Customer will be contacted through the channel.

   - If necessary, <u>Add or Update a Customer Authorization Document</u>.

   - If necessary, <u>Remove a Customer Authorization Document</u>.

   - Use the **Comm Last Sent Date** <u>Calendar Menu</u> to change the most recent communication date for the channel.

3. Click the **Save** button to save the changes and close the <u>Preference Center Detail Window</u>, or click the [X] in the upper right corner to close the <u>Preference Center Detail Window</u> 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 <u>Preference Center Detail Window</u>, click the <u>Link</u> in the Customer Authorization column (either **Attach a document**, or the name of the authorization file).

   A **Choose a document file to import** <u>Window</u> opens.

Choose a document file to import

Browse… No file selected.

Cancel Import
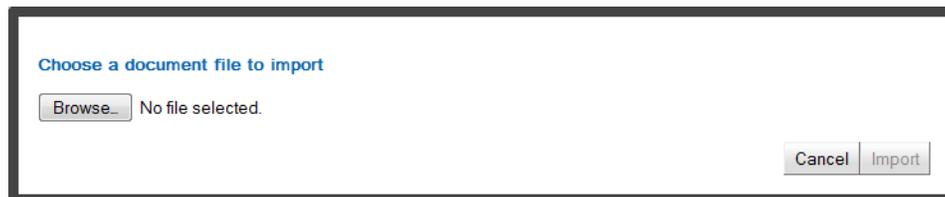
Figure 2-102: Choose a Document File to Import Window

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 <u>Window</u> closes and the filename is displayed in the Customer Authorization <u>Link</u>.

   Note: The Customer Authorization file is not actually saved until the Save button is clicked in the Preference Center Detail <u>Window</u>.

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.

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

Social Profile

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

Access the Social Profile page 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 Page opens.

Figure 2-103: Social Profile Page

Social Profile Page

The Social Profile page 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 2-104: 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:

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

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

   The Social Profile opens in a Social Profile Detail Window.

2. Click the **Delete** button.

   A confirmation Window opens.

3. Click **OK** to delete the Social Profile and return to the Social Profile List.

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

Social Activity

The Social Activity Page 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 page, click **Social Activity** in the Customer Actions Menu.

The Social Activity Page opens.

Figure 2-105: Social Activity Page

Social Activity Page

The Social Activity page 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 Customer Engagement. See the *Oracle Retail Customer Engagement Cloud Services Implementation 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 page allows the user to view or change the Franchisees to which a Customer is assigned.

Access the Franchisee Assignment page 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 Page opens.

Figure 2-106: Franchisee Assignment Page

Franchisee Assignment Page

The Franchisee Assignment page 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

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

Whenever a new Customer is added or updated, the Customer information (first name, last name, prefix, suffix, gender, address, postal code, phone number, and email address) is validated. If any of the information provided does not meet the criteria of the Customer Engagement 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.

3

Clienteling

Overview

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

> **Important:** The "ClientelingCustomerSearch" role is required to access this area of Customer Engagement and perform the functions available in it. See the *Customer Engagement Implementation Guide* for more information about Roles.

About This Chapter

This chapter contains the following information:

- [Clienteling Customer Lookup/Edit](#) describes the page used to search for Customers, as well as the search procedure. Options include:

  - [Clienteling Search](#)

- [Clienteling Customer List](#) describes the page showing a list of Customers found by a Clienteling Customer search. Options include:

  - [Actions Menu](#)

  - [Open a Customer Record](#)

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.

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

To perform a Clienteling search, do the following:

1. Open the Clienteling Customer Lookup/Edit page.

2. In the STEP 1 section, use the Selection Menus to filter the Segments contained in the **Segment Id** Selection Menu.

    Tip: 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. Also, a Segment is displayed only if the Publish to Clienteling flag was selected.

    *   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.

       Note: 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.

       Note: 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: *Clienteling 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 for more information.
④	**Page Navigation** - Page Navigation for the List.
⑤	**Customer List** - A List of Customers matching the search criteria. This List includes the following information for each Customer:

- **Customer Id** - Unique identifier for the Customer.
- **First Name** - Customer's first name.
- **Last Name** - Customer's last name.
- **Address** - Street address for the Customer.
- **City** - Customer's city.
- **State** - State or province for the Customer.

Actions Menu

The Actions Menu for the 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 page 1 in Chapter 21, "Analytics/Reports".

- **Add Customer** - Create a new Customer. See Create a Customer.

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.

4

Customer Merge Review

Overview

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

Merge Description

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

About this Chapter

This chapter includes the following information:

- Customer Merge Review - This section describes the Customer Merge Review page and the activities performed through it. Options include:

  - Actions Menu

  - View Duplicates

  - View Duplicate Differences

  - Approve Duplicates

  - Disallow Duplicate Merges

  - Delete Duplicates

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 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 for more information.

- **Delete** - Delete all of the found duplicates from the currently selected Strategy. Delete Duplicates for more information.
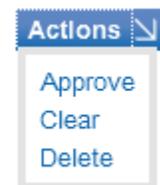
View Duplicates

To review the duplicates found by the last Duplicate Search:

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

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

Figure 4-2: Search Strategy Selected

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

    This menu displays the following information:

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

- **set count** - The number of duplicates found.

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

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

Customer Merge Review — Duplicate Strategy: Name Address — Strategy Status: Unapproved — Number of customers per set=set count: 2=31

Figure 4-3: Duplicate List

The duplicate List displays the following information for each duplicate:

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

- **Dupe Set Seq** - The order in which the duplicate was found during the duplicate search.

- **First Name** - First Name of the Customer.

- **Last Name** - Last Name of the Customer.

- **Address Line 1** - Line 1 of the Customer's primary street address.

- **City** - City of the Customer's primary address.

- **State** - State or province of the Customer's primary address.

- **Postal Code** - Postal Code or ZIP Code of the Customer's primary address.

View Duplicate Differences

To view the differences between duplicate Customer records, click the duplicate in the duplicate List. A Duplicate Set Customer Differences Window opens.
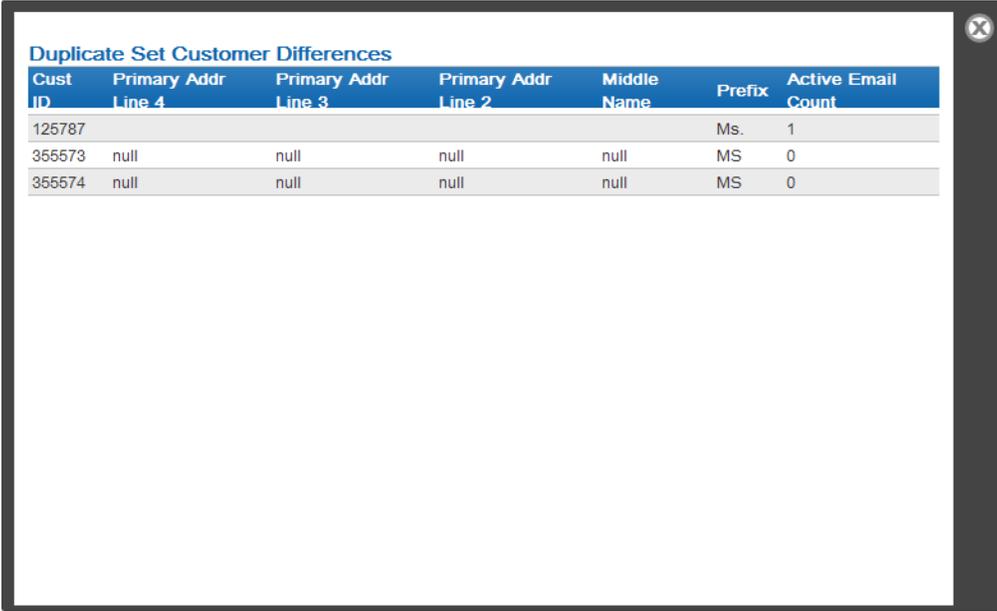
Cust ID	Primary Addr Line 4	Primary Addr Line 3	Primary Addr Line 2	Middle Name	Prefix	Active Email Count
125787					Ms.	1
355573	null	null	null	null	MS	0
355574	null	null	null	null	MS	0

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.

⚠ This will allow merging of the currently selected duplicate strategy. Are you sure?

Cancel | OK
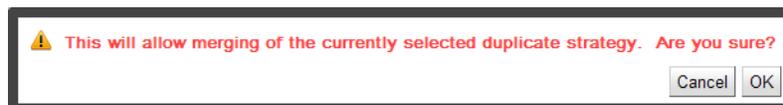
Figure 4-5: Confirmation Window

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.
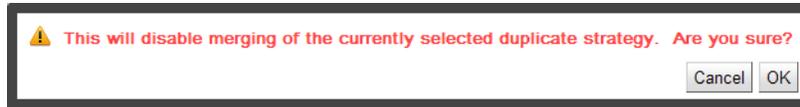
Figure 4-6: Confirmation Window

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.
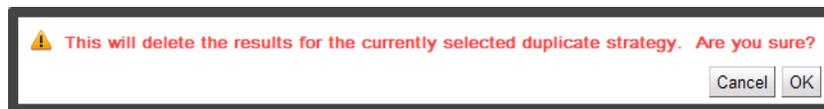
Figure 4-7: Confirmation Window

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.

5

Customer Item Registry

Overview

The Customer Item Registry allows you to set up:

- Gift Registry: Select items that the recipient would like to receive—usually for some special event, such as a wedding or baby shower.

- Wish List: Select items that the recipient would like to receive, without identifying a special event as with a Gift Registry.

Customers can then access the item registry and purchase registry items for the recipient. The Item 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 Item Registry describes the Customer Item Registry page.

- Customer Item Registry List describes the List of Customer Item Registries returned by a Item Registry Lookup.

- Registry Information Window describes the information and actions available in the Registry Information Window.

- Item Registry Print provides information about the Item Registry Print page.

- Create a Customer Item Registry provides the procedure for creating a Customer Gift Registry.

- Edit a Customer Item Registry describes how to update an existing Customer Gift Registry.

Customer Item Registry

Use the Customer Item Registry page to locate and update an Item Registry.

Item Registry Lookup

To look up an Item Registry in Customer Engagement:

1. Use the **Customer->Customer Item Registry** menu option, or select the **Customer Item Registry** Link on the Main Page to open the Customer Item Registry page.

   The Customer Item Registry lookup page opens.

Figure 5-1: Customer Item Registry Lookup Page

2. Enter the search information for the Item Registry:

Note: To retrieve all the active Item 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 Item Registry** - This section contains fields used to search for properties of the Item Registries themselves.

  * **Registry Name** - Name of the Registry (uses a Text Field with a Matching Rule Menu).

  * **Registry Type** - Select either Gift Registry or Wish List.

  * **Event Type** - Type of event for which the Registry was created (uses a Text Field with a Matching Rule Menu). You should not select an Event Type when searching for a Wish List, because a Wish List is not associated with an event.

  * **Registry Status** - A Selection Menu for the current status of the Registry. You can select All Registries, All Active Registries, or All Past Registries. If you select All Past Registries, you can select a date in the To field in order to display only Gift Registries whose Event Dates were on or earlier than the selected date.

      *   **Event Date** - Either the date on which the event occurs (uses a Calendar Menu).

      *   **Registry Id** - ID of the Registry (uses a Text Field).

    -   **Registry Owner** - This section contains fields used to search for Item Registries through the 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 a Card associated with the Customer (uses a Text Field).

3. Click the **Search** button.

   Customer Engagement displays a List of Registries matching the entered search criteria.

Figure 5-2: Customer Item Registry Search Results

Actions Menu

The Actions Menu for the Customer Item Registry search page provides the following options:

- **Clear Search** - Clear the search fields and restore defaults.

- **Add New Item Registry** - Create a Customer Item Registry using the Customer Item Registry Wizard.
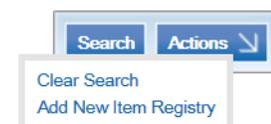
Customer Item Registry List

The Customer List is accessed through the Item Registry Lookup process.
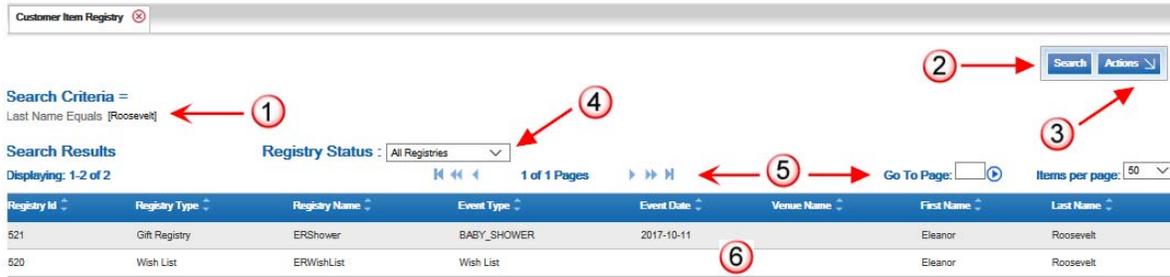
Figure 5-3: Customer Item Registry List

Table 5-1: *Customer Item 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 Item Registry page and perform another search.
③	**Actions Menu** - Click to open a menu of actions that can be performed in the Customer Item Registry List page. See Actions Menu for more information.
④	**Filter Menu** - Select criteria in the Selection Menu to view a subset of the Item Registries in the List based on status.
⑤	**Page Navigation** - Page Navigation for the List.
⑥	**Customer Item Registry List** - A List of Customer Item Registries currently in the system. The List displays a limited number of Customer Item Registries; use the Filter Menus to narrow down the List and locate a certain Registry. This List includes the following information for each Customer Item Registry: • **Registry Id** - Unique identifier for the Customer Item Registry. • **Registry Type** - Either Gift Registry or Wish List. • **Registry Name** - Name of the Registry. • **Event Type** - Type of event for which the Registry was created. Included only for a Gift Registry. • **Event Date** - Date of the event for a Gift Registry. • **Venue Name** - Name of the location where the event takes 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 Item Registry using the Customer Gift Registry Wizard.

Open a Customer Item Registry

To open a Customer Item Registry, click the Registry in the Customer Item 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, or indicates if the Registry is a Wish List.

- **Event Date** - Date of the event. Included only for a Gift Registry.

- **Expiration Date** - Date on which the Registry expires. Included only for a Gift Registry.

- **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. Included only for a Gift 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 Item Registry Visualizer.

Edit a Customer Item Registry

To edit an Item Registry:

> **Tip:** To make changes to the Items in an Item Registry, it may be easier to makes changes through the Item Registry Visualizer for the primary owner's Customer record. See Open Registry in a Customer Record for instructions on opening the Item Registry Visualizer.
>
> The following procedures are available in the Item Registry Visualizer:
>
> - Add an Item
> - Change the Desired Quantity of an Item
> - Remove an Item from the Registry

1. Click the **Edit** button in the Registry Information Window.

   The Item Registry opens in a Create a Customer Item Registry Wizard.

2. Update the Item Registry.

   - Use Wizard Navigation to move through the Item Registry.

   - Make any necessary changes.

   - Click **save** when you are finished making changes. The Item Registry will be saved and you will return to the Customer Item Registry List.

   - Click **cancel** to discard the changes, cancel the operation, and return to the Customer Item Registry List.

Open a Registry for Printing

To open an Item Registry for printing, click the **Print Registry** button in the Registry Information Window. The Item Registry opens in the Item Registry Print page.

Item Registry Print

The Item Registry Print page displays Registry information suitable for a printout that can be given to a Customer. The Customer can then use the printout to locate Items on the Registry. This page displays the following information:

Figure 5-5: Item 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. Included only for a Gift Registry.

  - **Comments** - Comments about the Registry.

  - **Expiration Date** - Date on which the Registry expires.

  - **Event Type** - Type of event, or indicates if the Registry is a Wish List.

- **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 an Item Registry

To print an Item Registry:

1. <u>Open a Customer Item Registry</u> in a <u>Registry Information Window</u>.

2. In the <u>Registry Information Window</u>, click the **Print Registry** button.

    The Registry opens in the <u>Item Registry Print</u> page.

3. Click the **Print** button in the top-right corner of the <u>Item Registry Print</u> 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 Item Registry

To create a Customer Item Registry:

1. From the Customer Item Registry List Actions Menu, select **Add New Item Registry**.

   The Item Registry Wizard opens.

2. In the Registry Type step, select either Gift Registry or Wish List. A Gift Registry is tied to an event, while a Wish List is open-ended.
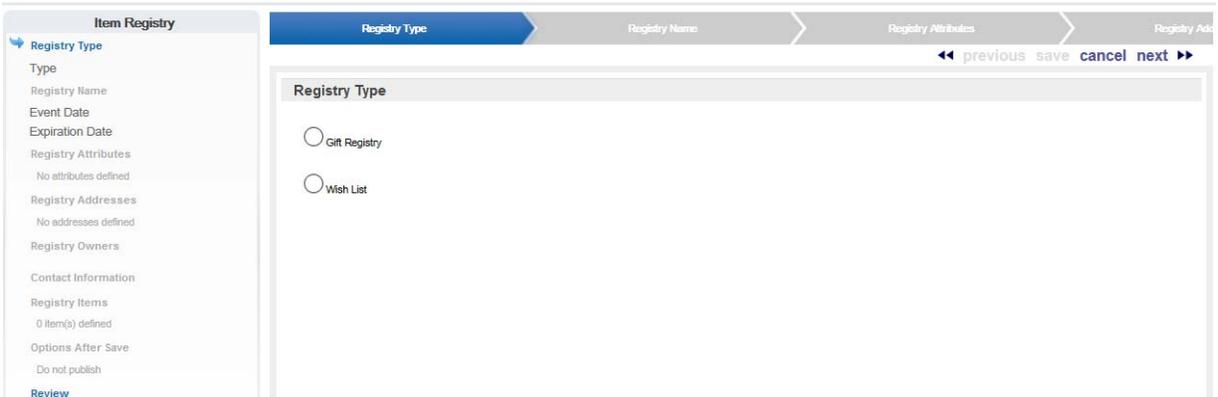
Figure 5-6: Item Gift Registry Wizard - Registry Type Step

3. Click **next** to continue with the next step. The Registry Information step opens.

Figure 5-7: Registry Information Step

4. 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. Required for a Gift Registry. Not included for a Wish List.

   - **Event Type** - Use this Selection Menu to select the type of event. Required for a Gift Registry. Not included for a Wish List.

- **Expiration Date** - Use the Calendar Menu and Time Menus to select the date and time when the Registry expires. Required for a Gift Registry. Not included for a Wish List.

- **Comments** - Additional comments for the Registry.

5. If necessary, add or update an image for a Gift Registry. This option is not available for a Wish List. To add or update an image:

a. Click the **Update Registry Image** Link.

The Update Image Window opens.
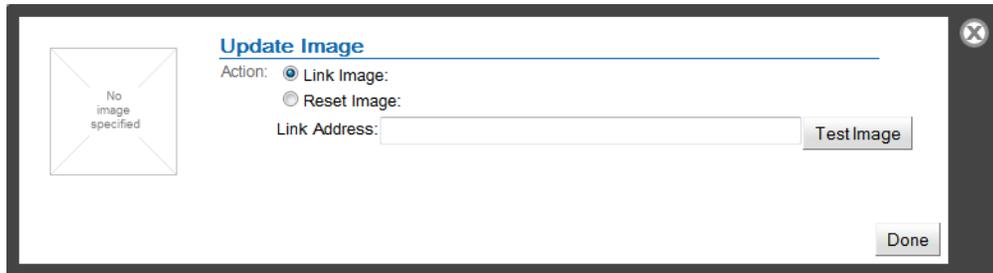
Figure 5-8: Update Image Window

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.

6. Click **next** to continue with the next step.

The Registry Attributes step opens.

Figure 5-9: Registry Attributes Step

7. 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 5-10: Registry Attributes Step - Attribute Group Selected

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

9. 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.

10. Click **next** to continue with the next step.

    The Registry Addresses step opens for a Gift Registry. Not included for a Wish List.

Figure 5-11: Registry Addresses Step

11. Select the Check Box for each type of address to add to the Gift Registry.

12. Address fields open for each address type selected.

Figure 5-12: Registry Address Fields Opened

13. 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.

14. Click **next** to continue with the next step.

The Registry Owners step opens.

Figure 5-13: Registry Owners Step

Create a Customer Item Registry

Use the following procedure to add a Customer as a Registry owner:

> **Note:** If you opened the Wizard through a Customer's Item Registry screen, the Customer will be entered as an owner.

a. Click the **Add** Link.

A Search Customer Window opens.
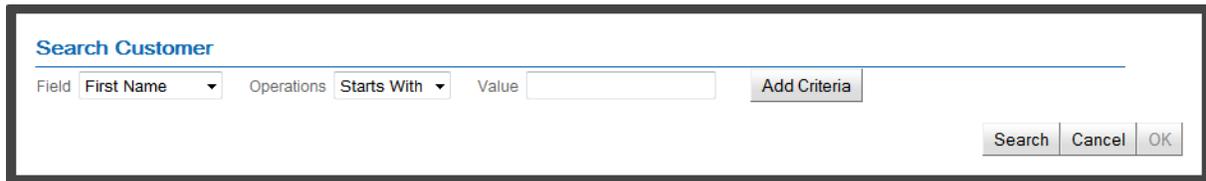
Figure 5-14: Search Customer Window

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.
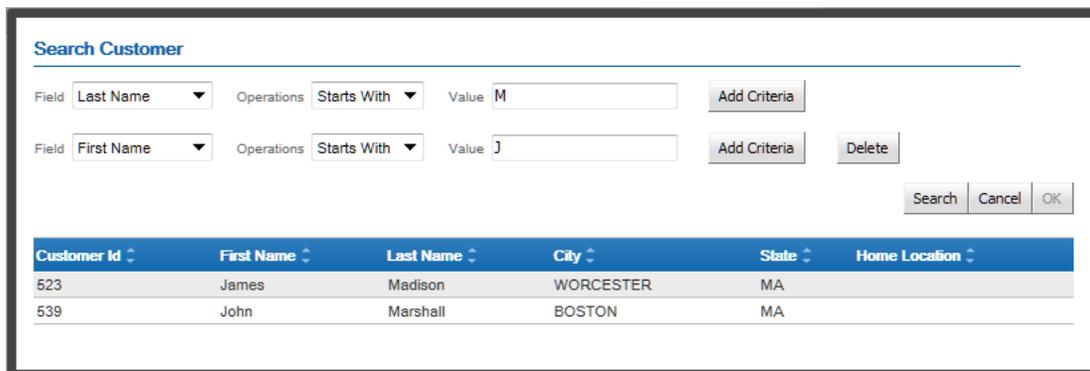
Figure 5-15: Customer Search Results

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.

Figure 5-16: Registry Owner Added

f. Optionally, enter a Nickname for the owner(s).

g. To add another Customer, repeat steps a-f.

15. If more than one owner was added to the Registry, use the **Primary** Radio Buttons to select the primary owner of the Registry.

16. If necessary, delete an owner by selecting the owner to delete, then selecting the **Delete** button.

The owner is deleted from the Registry.

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17. Click **next** to continue with the next step.

The Contact Information step opens.

The contact information for each owner is automatically populated with the primary address, email, and telephone number in the owner's Customer record.

18. If necessary, make changes to the owner contact information.

To clear all the fields for an owner, click the **Clear contact information** Link.

> **Note:** If the address, email, or phone is changed here, a new address, email, or phone is added to the Customer record with a Type of GIFTREGISTRYSAMPLE, where SAMPLE is the Registry ID.

19. Click **next** to continue with the next step.

The Registry Items step opens.

Figure 5-17: Registry Items Step

20. To add an item to the Registry:

a. Click the **Add** Link.

    b.   The Item Entry <u>Window</u> opens.
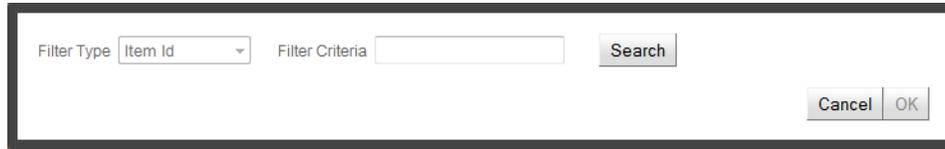
Figure 5-18: Item Entry Window

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 <u>List</u> of Items matching the entered search criteria is displayed.
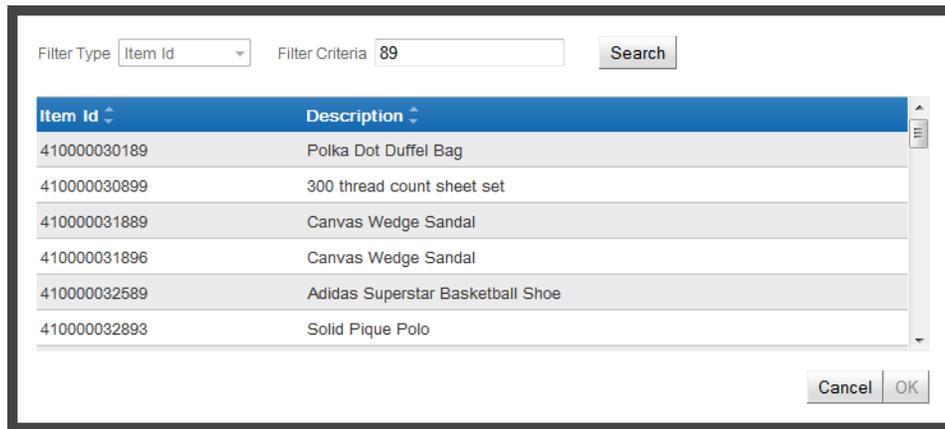
Figure 5-19: Item Search Results

    d.   Click to select the Item to add to the Registry.

    e.   Click the **OK** button.

    f.   The Item Entry <u>Window</u> closes and the Item is added to the Registry.

Figure 5-20: 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.

  21. Click **next** to continue with the next step.

The Options After Save step opens.

Figure 5-21: Options After Save Step

22. 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.

23. Click **next** to continue with the next step.

    The Review step opens.

24. 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 Item 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 Item Registry List.

6

Segments

Overview

Customer Segments organize Customers into groups related by certain, specified criteria. These Segments can be used to define the Segment/Target Eligibility rules used by various Customer Engagement 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.

- **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.

- **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.

About this Chapter

This chapter includes the following information:

- Unstratified Segments - This section describes segments in which the Customers are not subdivided into different groups. Options include:

  - Unstratified Segment List

  - Unstratified Segment Window

  - Create Unstratified Segment

- Stratified Segments - This section describes segments in which the Customers are divided into subgroups based on certain criteria. Options include:

  - Stratified Segment List

  - Stratified Segment Window

  - Create Stratified Segment

- Manual Segments - This section describes segments created by manually selecting Customers. Options include:

  - Manual Segment List

  - Manual Segment Window

Overview

- [Create Manual Segment](#)
- [Edit Manual Segment](#)
- [View Customer List](#)
- [Delete Manual Segment](#)

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
	Actions Menu - Click to open a menu of actions that can be performed in the Unstratified Segment List page. See Actions Menu for more information.
	Filter Menus - Select criteria in the Filter Menus to view a subset of the Segments in the Unstratified Segment List. See Filter Menus for more information.
	Unstratified Segment List - A List of Unstratified Segments currently in the system. The List displays a limited number of Segments; use the Filter Menus to narrow down the List and locate a certain Segment.

This List includes the following information for each Segment:

- **ID** - Unique ID for the Segment.

- **Name** - Name of the Segment.

- **Description** - Description of the Segment.

- **Times Run** - The number of times the Segment has been run.

- **Customer Count** - Number of Customers in the Segment.

- **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. If this option is set to **No**, the Segment only creates a count of the Customers that meet the criteria.

- **Trend Results** - Indicates whether trend results are saved for the Segment.

- **Last Run** - The most recent date and time on which the Segment was run.

Actions Menu

The Actions Menu in the Unstratified Segment List contains the following options:

- **Create** - Create an Unstratified Segment (see Create Unstratified Segment).

- **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 displayed only if the Show Clienteling Customer Search Menu property is enabled in System Configuration*. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

  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 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 property is enabled in System Configuration*. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

  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.

- **Publish to Batch Exporter** - Filters the List by whether the Segments are flagged for export to a Marketing system such as Responsys. *This Selection Menu is displayed only if the Supported Batch Exporter Types property in System Configuration specifies a type of batch exporter*. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

  This filter has the following options:

  - **All** - [DEFAULT] Do not filter the List to segments flagged for export to a Marketing system such as Responsys.

- **Yes** - Display only those Segments that are flagged for export to a Marketing system such as Responsys.

- **No** - Display only those Segments that are not flagged for export to a Marketing system such as Responsys.

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 Batch Exporter** - Indicates whether the Segment has been made available for export to a Marketing system such as Responsys. *This [Selection Menu](#) is displayed only if the Supported Batch Exporter Types property in System Configuration specifies a type of batch exporter.* See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

• **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 <u>Wizard Navigation</u> 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 Customer Engagement will return to the <u>Unstratified Segment List</u>.

- Click **cancel** to discard the changes, cancel the copy operation, and return to the <u>Unstratified Segment List</u>.

For more information about the fields and information to be entered, see <u>Create Unstratified Segment</u>.

Actions Menu

The Actions Menu in the Unstratified Segment Window has the following options:

> **Note:** Depending upon the current status of the Segment, all of the options below may not be available.

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

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

You are about to create an export file for segment: loyalty. The file will contain 54 records. Do you wish to proceed?

OK   Cancel

Figure 6-4: Export Confirmation Prompt

Actions
Edit
Export
Delete
Show sql

- Click **OK** to export the Segment and close the prompt.
- Click **Cancel** to close the prompt and not export the Segment.

  The completed export job is listed in the Process Queue, including compressed lists of the customers in the Segment in XML and CSV format.

- **Edit** - Edit the Segment.

  The Segment opens in the Unstratified Segment Wizard. See Create Unstratified Segment for further information about editing the Segment.

- **Delete** - Deletes the Segment.

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

You are about to delete segment: loyalty. Do you wish to proceed?

OK   Cancel

Figure 6-5: Delete Confirmation Prompt

- Click **OK** to delete the Segment, and close the prompt and the Unstratified Segment Window.
- Click **Cancel** to close the prompt and keep the Segment in place.

- **Show Sql** - Opens a Query Window showing the SQL used by the Segment Query.

The Unstratified Segment Window displays the SQL used to construct the Segment.

Figure 6-6: Show SQL

Create Unstratified Segment

To create a new Unstratified Segment:

1. In the Unstratified Segment List page, click **Create** in the Actions Menu.

The Unstratified Segment creation Wizard opens.

Figure 6-7: Create Unstratified Segment Wizard

2. In the Segment Name step, enter information into the fields:

    - **Name** - The name of the Segment.

    - **Description** - A description of the Segment.

- **Segment Options** - Use each Check Box to select whether the Segment will have the associated property:

  * **Publish To Clienteling** - Determines whether the Segment will be available in the Clienteling module. See page 1 in Chapter 3, "Clienteling" for more information.

    Note: 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** and **Export** are automatically unchecked and the Check Boxes are disabled.

    A User must be assigned the PublishClientelingSegment Role to see this option. See the *Customer Engagement Implementation Guide* for more information about Roles.

  * **Publish to Task Generator** - Determines whether tasks will be created for this Segment.

    Note: 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.

    Note: 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.

    Note: 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 Batch Exporter** - Determines whether the Segment will be available to export to a Marketing system such as Responsys.

Note: If the **Publish to Batch Exporter** option is selected, **Public**, **Export**, **Save as List**, and **Permanent** are automatically checked and the Check Boxes are disabled; P**ublish to Clienteling**, **Open Access** and **Trend Results** are automatically unchecked and the Check Boxes are disabled.

---

3. When you have finished entering information, click **Next**.

    - If Franchisees are enabled in Customer Engagement, the Franchisees step opens. Continue with step 4.

    - If Franchisees are not enabled in Customer Engagement, 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 27: "Segment Queries" on page 1 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 27: "Segment Queries" on page 1 for more information about criteria fields.

ALL ▾

Logical Attribute Values ▾

Customers with attribute name [   ]
having value [True ▼]

Lifetime Sales ▾

Total sales [=] [▼] [   ]

Happy Anniversary ▾

Sign-up Month [January ▼]

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 9), 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:

| Segment Name | Segment Query | Text | Segment Attribute | Schedule Definition |

◀◀ previous   save   cancel   next ▶▶

POS Message

Language [(Please select) ▼]

POS Display [   ]

Customer Display [   ]

Receipt Display [   ]

[Add]

| Language | POS Display | Customer Display | Receipt Display |

Figure 6-12: Text Step

    a. Use the **Language** <u>Selection Menu</u> to select the language of the messages.

> **Tip:** 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 <u>Selection Menu</u> and enter the new texts. The existing entry will be overwritten.

    b. In the **POS Display** <u>Text Area Field</u>, enter the text that will be displayed to the associate/employee using the POS system.

    c. In the **Customer Display** <u>Text Area Field</u>, 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** <u>Text Area Field</u>, 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 Attributes

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

    i. 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.

   j. 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 6-15: Schedule Definition Step

   a. Select the Job Execution Frequency. This <u>Selection Menu</u> 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** *is selected in the Segment Name step (see* <u>step 2 on page 9</u>*).*

   * **Once, Later** - Run the Segment Query at a later date or time. *This option is not available if* **Publish to Clienteling** *is selected in the Segment Name step (see* <u>step 2 on page 9</u>*).*

   * **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** <u>Calendar Menu</u> 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** <u>Calendar Menu</u> 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** <u>Selection Menu</u> 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.

> **Tip:** It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

    g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

13. When you have finished defining the schedule, click **next** to continue.

    The Review step opens.

14. Review the entered information to ensure that it is correct.

    - Click **save** to save the Segment with the current settings and return to the Unstratified Segment List.

    - Use Wizard Navigation to return to an earlier step and make any necessary changes.

    - Click **cancel** to delete all information and return to the Unstratified Segment List.

Job Processing Window

The Job Processing Window displays the time(s) at which scheduled jobs should run. The Window is intended to indicate times when there will be little processing load on the system, so that Job processing will not interfere with transaction processing.

Job Processing Window

Monday - 16:00, 7 hours
Tuesday - 16:00, 7 hours
Wednesday - 16:00, 7 hours
Thursday - 16:00, 7 hours
Friday - 16:00, 7 hours
Saturday - 16:00, 7 hours
Sunday - 16:00, 7 hours

Figure 6-16: 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 6-17: Stratified Segment List

Table 6-2: *Stratified Segment List Page Key*

Item	Description
	Actions Menu - Click to open a menu of actions that can be performed in the Stratified Segment List page. See Actions Menu for more information.
	Filter Menus - Select criteria in the Filter Menus to view a subset of the Segments in the Stratified Segment List. See Filter Menus for more information.
	Stratified Segment List - A List of Stratified Segments currently in the system. The List displays a limited number of Segments; use the Filter Menus to narrow down the List and locate a certain Segment.

This List includes the following information for each Segment:

- **ID** - Unique ID for the Segment.
- **Name** - Name of the Segment.
- **Description** - Description of the Segment.
- **Times Run** - The number of times the Segment has been run.
- **Customer Count** - Number of Customers in the Segment.
- **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. If this option is set to **No**, the Segment only creates a count of the Customers that meet the criteria.
- **Trend Results** - Indicates whether trend results are saved for the Segment.
- **Last Run** - The most recent date and time on which the Segment was run. |

Actions Menu

The Actions Menu in the Stratified Segment List contains the following option:

- **CREATE** - Create a Stratified Segment. See Create Stratified Segment.

- **REFRESH** - Refresh the List, displaying any updates to the Stratified Segments.

Filter Menus

The Stratified Segment List includes the following filter menus:

Figure 6-18: 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 property is enabled in System Configuration.* See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

  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 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 property is enabled in System Configuration.* See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

  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.

- **Publish to Batch Exporter** - Filters the List by whether the Segments are flagged for export to a Marketing system such as Responsys. *This Selection Menu is displayed only if the Supported Batch Exporter Types property in System Configuration specifies a type of batch exporter.* See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

  This filter has the following options:

  - **All** - [DEFAULT] Do not filter the List to segments flagged for export to a Marketing system such as Responsys.

- **Yes** - Display only those Segments that are flagged for export to a Marketing system such as Responsys.

- **No** - Display only those Segments that are not flagged for export to a Marketing system such as Responsys.

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.
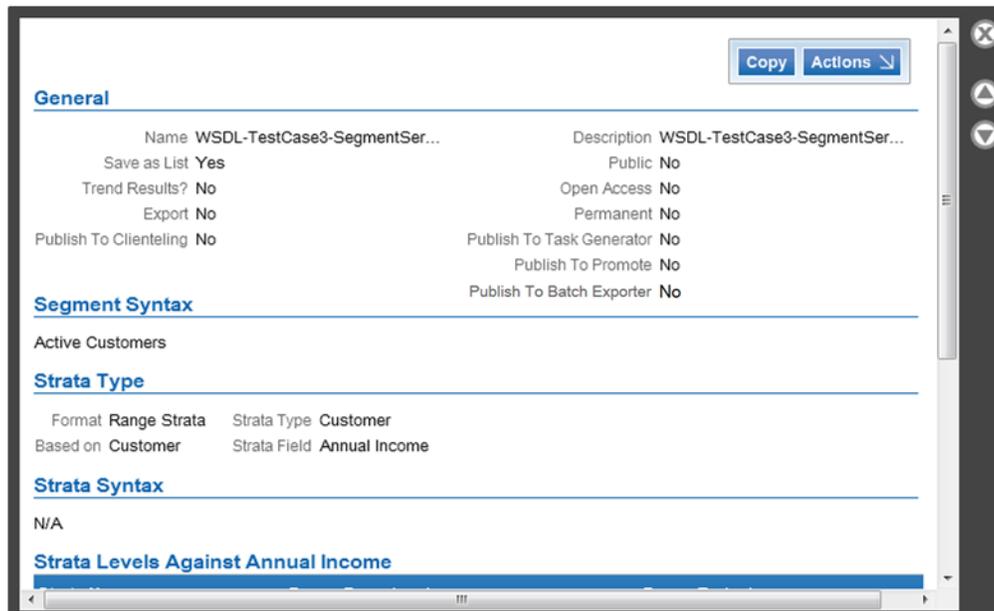
Figure 6-19: Stratified Segment Window

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 Batch Exporter** - Indicates whether the Segment has been made available for export to a Marketing system such as Responsys.

- **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.

        Note: 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.

- 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 Customer Engagement 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.

Actions Menu

The Actions Menu in the Stratified Segment Window has the following options:

> **Note:** Depending upon the current status of the Segment, all of the options below may not be available.

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

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

You are about to create an export file for segment: segment. The file will contain 50386 records. Do you wish to proceed?

OK   Cancel

Figure 6-20: Export Confirmation Prompt

  - Click **OK** to export the Segment and close the prompt.
  - Click **Cancel** to close the prompt and not export the Segment.

  The completed export job is listed in the Process Queue, including compressed lists of the customers in the Segment in XML and CSV format.

- **EDIT** - Edit the Segment.

  The Segment opens in the Stratified Segment Wizard. See Create Stratified Segment for further information about editing the Segment.

- **DELETE** - Deletes the Segment.

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

You are about to delete segment: segment. Do you wish to proceed?
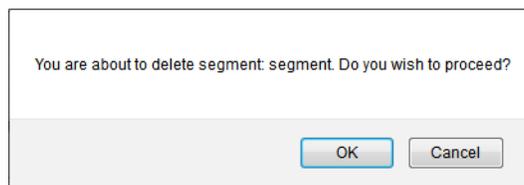
OK   Cancel

Figure 6-21: 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 cusid_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  =  '44055'  )) );

 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 6-22: 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 6-23: Create Stratified Segment Wizard

2. In the Segment Name step, enter information into the fields:

   - **Name** - The name of the Segment.

- **Description** - A description of the Segment.

- **Segment Options** - Use each Check Box to select whether the Segment will have the associated property:

    * **Publish To Clienteling** - Determines whether the Segment will made available to the Clienteling module. See page 1 in Chapter 3, "Clienteling" for more information.

    Note: 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** and **Export** are automatically unchecked and the Check Boxes are disabled.

    A User must be assigned the PublishClientelingSegment Role to see this option. See the *Customer Engagement Implementation Guide* for more information about Roles.

    * **Publish to Task Generator** - Determines whether tasks will be created for this Segment.

    Note: 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.

    Note: 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.

    Note: 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 Batch Exporter** - Determines whether the Segment will be available to export to a Marketing system such as Responsys.

Note: If the **Publish to Batch Exporter** option is selected, **Public**, **Export**, **Save as List**, and **Permanent** are automatically checked and the Check Boxes are disabled; P**ublish to Clienteling**, **Open Access** and **Trend Results** are automatically unchecked and the Check Boxes are disabled.

3. When you have finished entering information, click **Next**.

   - If Franchisees are enabled in Customer Engagement, the Franchisees step opens. Continue with step 4.

   - If Franchisees are not enabled in Customer Engagement, 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 6-24: Segment Franchisees

5. Click **next** when you are finished.

   Continue with the next step.

6. Build the Segment Query:

Figure 6-25: 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 27: "Segment Queries" on page 1 for more information about criteria group organization.

⊕ Customer Demographics
⊕ Customer Contact
⊕ Customer Attributes
⊕ Purchase Activity
⊕ Basic Programs
⊕ Segment Elements
⊕ Promotion Activity
⊕ Strategic Segments
⊕ Loyalty Segments
⊕ Social Networks
⊕ Social Profiles

Add

Figure 6-26: 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 27: "Segment Queries" on page 1 for more information about criteria fields.

Figure 6-27: 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 6-28: 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 <u>Selection Menu</u> 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 <u>Selection Menu</u> 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.
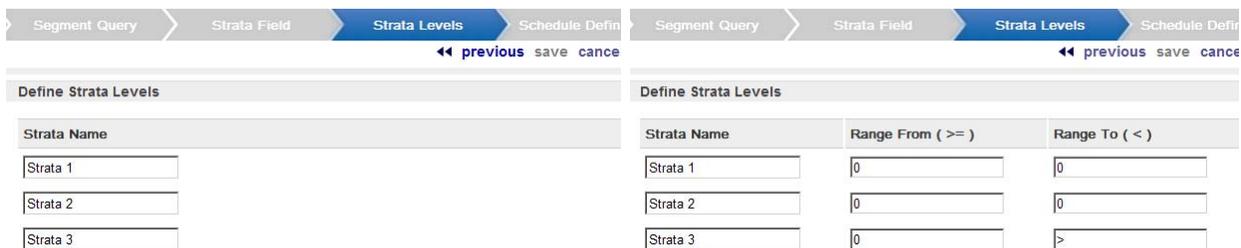
Figure 6-29: Strata Levels Step

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 23), 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 27: "Segment Queries" on page 1 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 <u>Appendix 27: "Segment Queries" on page 1</u> 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** <u>Check Box</u> was checked (☑) in the Segment Name step (see <u>step 2 on page 23</u>), the Text step opens. Continue with step 14.

- If the **Open Access** <u>Check Box</u> 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 6-30: Text Step

    a. Use the **Language** <u>Selection Menu</u> to select the language of the messages.

> **Tip:** 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 <u>Selection Menu</u> and enter the new texts. The existing entry will be overwritten.

    b. In the **POS Display** <u>Text Area Field</u>, enter the text that will be displayed to the associate/employee using the POS system.

    c. In the **Customer Display** <u>Text Area Field</u>, enter the text that will be displayed to the customer while the transaction is being performed.

    d. In the **Receipt Display** <u>Text Area Field</u>, 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 6-31: 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:
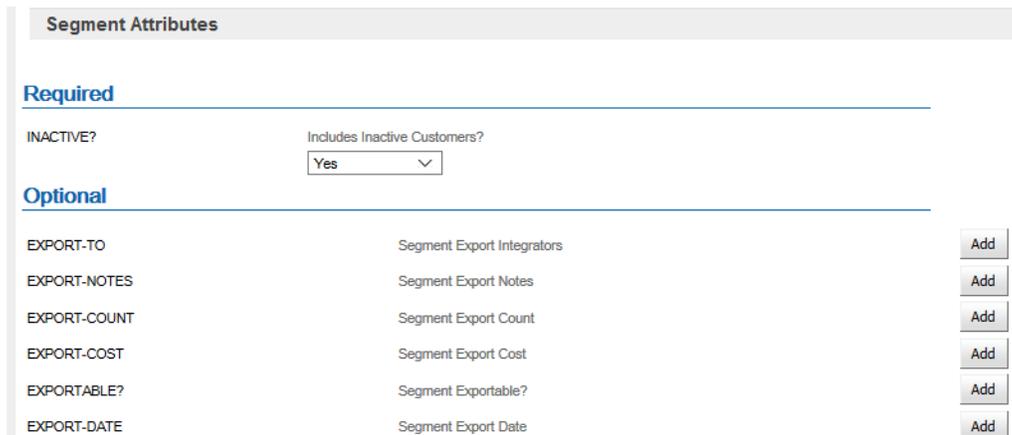
Figure 6-32: Segment Attributes

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

    i. 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.

    j. 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 6-33: 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** *is selected in the Segment Name step (see step 2 on page 23).*

* **Once, Later** - Run the Segment Query at a later date. *This option is not available if* **Publish to Clienteling** *is selected in the Segment Name step (see step 2 on page 23).*

* **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.

> **Tip:** It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

    g. Use the **Override Job Processing Window** Check Box to indicate whether the job should run, even if it is scheduled outside the Job Processing Window.

19. When you have finished defining the Schedule, click **next** to continue.

The Review step opens.

20. Review the entered information to ensure that it is correct.

- Click **save** to save the Segment with the current settings and return to the Stratified Segment List.

- Use Wizard Navigation to return to an earlier step and make any necessary changes.

- Click **cancel** to delete all information and return to the Stratified Segment List.

Job Processing Window

The Job Processing Window displays the time(s) at which scheduled jobs should run. The Window is intended to indicate times when there will be little processing load on the system, so that Job processing will not interfere with transaction processing.

Job Processing Window
```
Monday - 16:00, 7 hours
Tuesday - 16:00, 7 hours
Wednesday - 16:00, 7 hours
Thursday - 16:00, 7 hours
Friday - 16:00, 7 hours
Saturday - 16:00, 7 hours
Sunday - 16:00, 7 hours
```

Figure 6-34: 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 6-35: 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 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 for more information.
③	**Manual Segment List** - A List of Manual Segments currently in the system. The List displays a limited number of Segments; use the Filter Menu to narrow down the List and locate a certain Segment.

This List includes the following information for each Segment:

- **ID** - Unique ID for the Segment.

- **Name** - Name of the Segment.

- **Description** - Description of the Segment.

- **Customer Count** - Number of Customers in the Segment.

- **Save as List** - Indicates whether a list of matching Customer IDs is created when the Segment is created. For Manual Segments, this configuration can only be set to **Yes**.

Actions Menu

The Actions Menu in the Manual Segment List contains the following option:

- **CREATE** - Create a Manual Segment (see Create Manual Segment).

- **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.
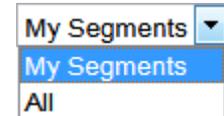
- **Publish to Batch Exporter** - Filters the List by whether the Segments are flagged for export to a Marketing system such as Responsys.

  This filter has the following options:

  - **All** - **[DEFAULT]** Do not filter the List to segments flagged for export to a Marketing system such as Responsys.

  - **Yes** - Display only those Segments that are flagged for export to a Marketing system such as Responsys.

  - **No** - Display only those Segments that are not flagged for export to a Marketing system such as Responsys.

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 <u>Window</u> displays information about the Manual Segment opened in the <u>Window</u>, and provides the ability to perform actions on the Manual Segment.
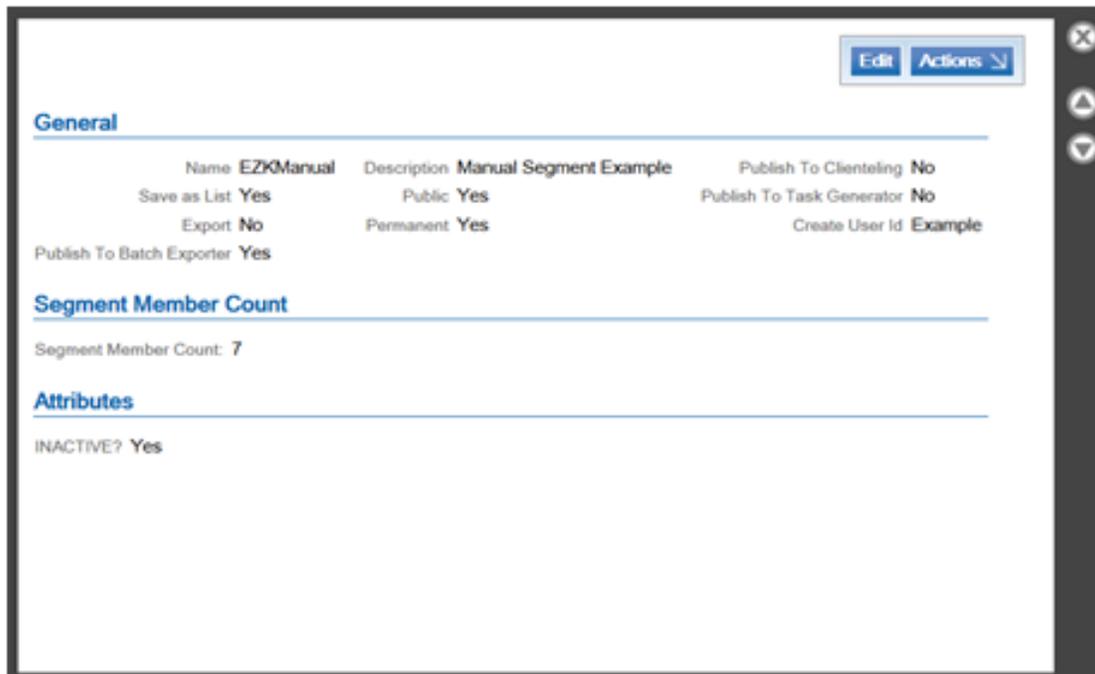
Figure 6-36: Manual Segment Window

The following information is displayed in the Manual Segment <u>Window</u>:

- **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**.

  - **Publish to Batch Exporter** - Indicates whether the Segment has been made available for export to a Marketing system such as Responsys.

  - **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.

- **DELETE** - Delete the Manual Segment from the system. See Delete Manual Segment.
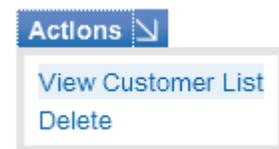
Create Manual Segment

To create a new Manual Segment:

1. In the Manual Segment List page, click **Create** in the Actions Menu.

   The Manual Segment creation Wizard opens.

Figure 6-37: 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 page 1 in Chapter 3, "Clienteling" for more information.

   Note: 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 PublishClientelingSegment Role to see this option. See the *Customer Engagement Implementation Guide* for more information about Roles.

   *   **Publish to Task Generator** - Determines whether tasks will be created for this Segment.

   Note: If the **Publish to Task Generator** option is selected, **Public** is automatically unchecked and the Check Box is disabled.

   *   **Publish To Batch Exporter** - Determines whether the Segment will be available to export to a Marketing system such as Responsys.

   Note: If the **Publish to Batch Exporter** option is selected, **Public** is automatically checked and the Check Box is disabled.

3. When you have finished entering information, click **Next**.

   - If Franchisees are enabled in Customer Engagement, the Segment Franchisees step opens. Continue with step 4.

   - If Franchisees are not enabled in Customer Engagement, 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**.
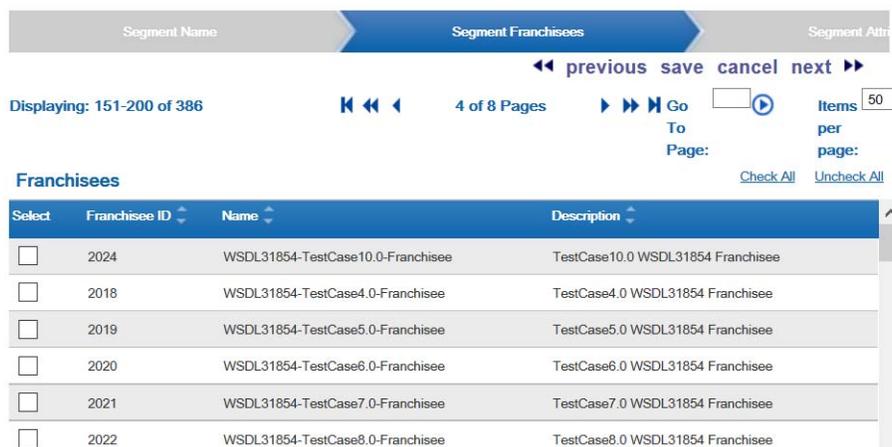
Figure 6-38: Segment Franchisees

5. Click **next** when you are finished.

   The Segment Attributes step opens.

6. Configure the Segment Attributes:

   The Attributes belonging to the selected Attribute Group are displayed.
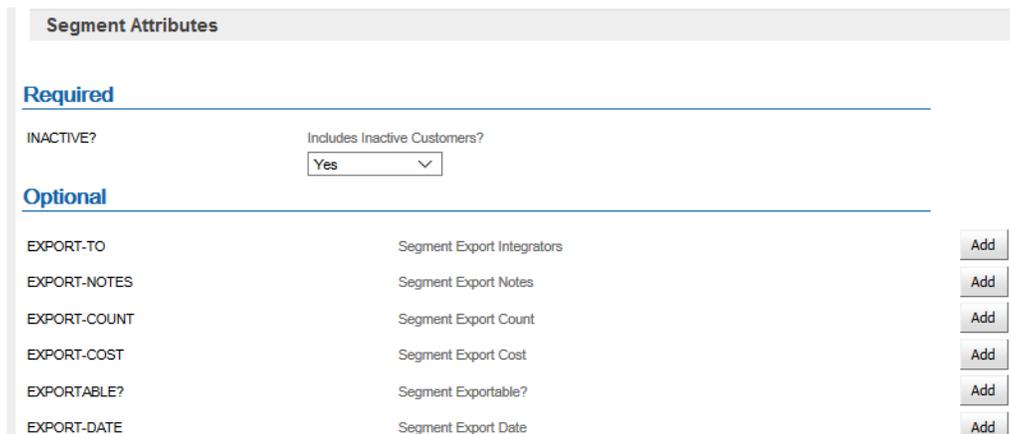
Figure 6-39: Segment Attribute Step

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

   i. 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.

j. 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 6-40: 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 6-41: Search Customer Window

   b. Use the Search Customer Window to enter search information, then click the **Search** button to search for Customers matching the search criteria.

      A List of search results is displayed.

Figure 6-42: 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.
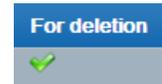
Edit Manual Segment

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 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 Customer Engagement 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.

> **Important:** 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 for more information about editing a Manual Segment).

Delete Manual Segment

To delete a Manual Segment from Customer Engagement:

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.

   You are about to delete segment: AM Test Group. Do you wish to proceed?
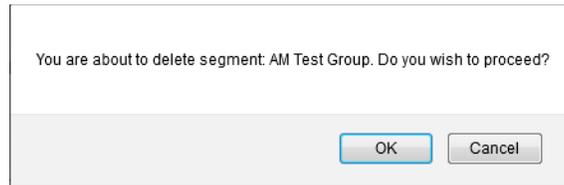
   OK   Cancel

   Figure 6-43: 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.

7

Promotions

Overview

In Customer Engagement, 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.

About This Chapter

This chapter contains the following information:

- Promotion Event Types - Describes the types of Promotions. Additional background includes:
    - Targeted Promotions
    - Untargeted Promotions
    - Social Media Listening
    - Control Groups
- Promotion List - Describes the Promotion List page. Options include:
    - Actions Menu
    - Filter Menus
    - Open a Promotion
    - Bulk Approve
    - Bulk Export Promotion Definition
    - Bulk Export to Batch
- Create a Promotion - Describes how to create a Promotion. Options include:
    - New Promotion Wizard
- Promotion Window - Describes the data and options at the Promotion window. Options include:
    - Actions Menu
    - View Coupon Codes
    - Open Promotion Scorecard

- Update a Promotion

- Copy a Promotion

- Generate a Promotion

- Create Coupons

- Conflict Report

- Approve a Promotion

- Export a Promotion Definition

- Export a Promotion to Batch

- Terminate a Promotion

• Promotion Scorecard - Describes the information metrics about the response to a Promotion. Options include:

- Scorecard

- Facebook Scorecard

- Twitter Scorecard

• Event Manager - Describes the Promotion Event and Tasks. Options include:

- Actions Menu

- Open a Task

- Open Promotion Scorecard

- Add a Task

• Contact List - Describes the list of Customers associated with an Event. Options include:

- Actions Menu

- Print Contact List

• Edit Task Window - Describes the window used to edit a Task. Options include:

- Edit a Task

Promotion Event Types

Customer Engagement 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.

• **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 an e-award or entitlement coupon.

Each promotion type is described below.

Targeted Promotions

Targeted Promotions are Promotion Events that are delivered exclusively to one or more Customer Segments (see 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, Customer Engagement 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 Customer Engagement 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, Customer Engagement 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.
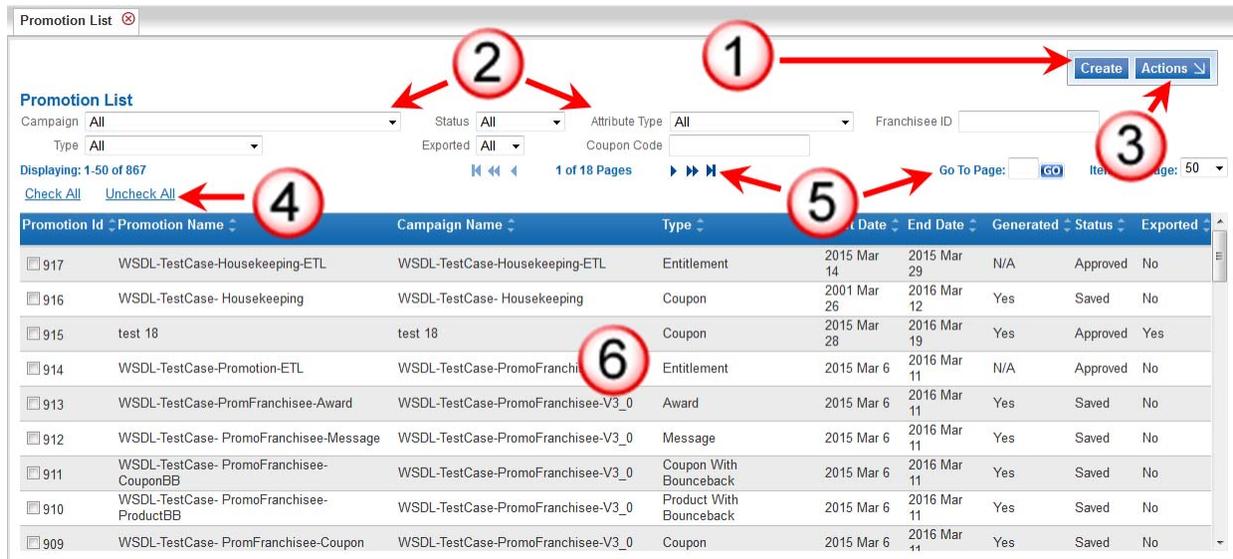
Figure 7-1: Promotions List

Table 7-1: *Promotion List Page Key*

Item	Description
1	**Create Button** - Click to create a new Promotion. See Create a Promotion for more information.
2	**Filter Menus** - Select criteria in the Filter Menus to view a subset of the Promotions in the Promotion List. See Filter Menus 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 for more information.
4	**Check Options** - Links to place or remove a check mark (☑) in each Check Box displayed in the current screen.
5	**Page Navigation** - Page Navigation for the List.

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

Item	Description
⑥	**Promotions** - A List of Promotions currently in the system. Use the Filter Menus to narrow down the List and locate a certain Promotion. This List includes the following information for each Promotion: • **Promotion ID** - Unique ID for the Promotion. • **Promotion Name** - Name of the Promotion. • **Campaign Name** - Name of the Campaign associated with the Promotion. • **Type** - Type of Promotion. • **Start Date** - Date on which the Promotion is first active. • **End Date** - Last date on which the Promotion is active. • **Generated** - Indicates whether the Target data for the Promotion has been generated. • **Status** - Current status of the Promotion. • **Exported** - Indicates whether the Promotion has been exported to external systems, including POS systems.

Actions Menu

The Actions Menu in the Promotion List page includes the following options:

> Approve
> Terminate
> Export Promotion Definition
> Export To Batch
> Refresh

• **Approve** - Approve selected Promotion(s). See Bulk Approve.

• **Terminate** - Terminate selected Promotion(s). See Bulk Terminate.

• **Export Promotion Definition** - Export the definition(s) of selected Promotion(s). See Bulk Export Promotion Definition

• **Export to Batch** - Export selected Promotion(s). See Bulk Export to Batch.

• **Refresh** - Refresh the Promotion List, displaying any updates.
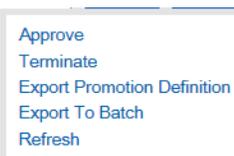
Filter Menus

The Promotion List page includes the following Filter fields:

Campaign	All	Status	All	Attribute Type	All	Franchisee ID	
Type	All	Exported	All	Coupon Code			

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.

- **Message** - Display only Message Promotions.

- **Award** - Display only Award 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 the promotion definition or data 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).

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 <u>Promotion List</u>, click to enter a check mark (☑) next to each Promotion to terminate.

2. Click **Terminate** in the <u>Actions Menu</u>.

All the selected Promotions are terminated. Terminated Promotions are not eligible for bulk export.

Bulk Export Promotion Definition

To export the definitions of multiple Promotions:

1. In the <u>Promotion List</u>, click to enter a check mark (☑) next to each Promotion to export.

2. Click **Export Promotion Definition** in the <u>Actions Menu</u>.

The definitions of the selected Promotions are exported. Each exported Promotion is listed separately as an Export Promotion at the Process Queue page.

The generated Promotion Definition XML file includes the following information:

- Promotion name, including the ID

- Promotion type, and whether it is serialized

- Promotion begin date

- Promotion end date

- Description

- Promotion target type

- Name and value for each Promotion Attribute

- Target Segment Group

- Included and Excluded Store Locations

- Details on each Deal

This option is not available for an Award Promotion.

Bulk Export to Batch

To export multiple Promotions to batch:

1. In the <u>Promotion List</u>, click to enter a check mark (☑) next to each Promotion to export.

2. Click **Export to Batch** in the <u>Actions Menu</u>.

All the selected Promotions are exported. Generated CSV sync files include:

- **Promotion Deals Sync file:**

    - Campaign ID

    - Promotion ID

    - Deal ID

    - Deal Name

- Deal Type

- Enabled Flag, where 1 = enabled

- Deal Group

• **Promotion Deals Attributes Sync File:**

  - Campaign ID

  - Promotion ID

  - Deal ID

  - Attribute Classification

  - Attribute ID

  - Attribute Name

  - Attribute Sequence Number

  - Attribute Value

  This file is generated only if Deal Attributes have been specified for the Promotion. Attributes are not included for deals that have been disabled.

• **Promotion Sync File:**

  - Campaign ID

  - Promotion ID

  - Promotion Type

  - Promotion Name

  - Description

  - Start Date

  - Start Time

  - End Date

  - End Time

  - Status

  - Serialized Coupon Flag, where 1 = serialized coupon

  - Award Program ID

  - Coupon Prefix

• **Promotion Targets Sync File:**

  - Customer ID

  - Campaign ID

  - Promotion ID

  - Target Name (segment)

  - Active Flag, where 1 = active

  - Promotion Start Date and Promotion Start Time

  - Promotion End Date and Promotion End Time

  This file is generated only if Targets are defined at the Define Targets step when creating the Promotion.

- **Promotion Serialized Coupon Sync File:**

  - Campaign ID

  - Promotion ID

  - Coupon ID

  - Customer ID

  This file is generated only if Serialized Coupons are enabled for the Promotion.

- **Promotion Award Coupon Sync file:**

  - Campaign ID

  - Promotion ID

  - Coupon ID

  - Customer ID

The above files are all listed at the Process Queue page under the Promotion Batch Export job for each selected Promotion.

Create a Promotion

The process for creating a new Promotion in Customer Engagement 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 page 1 in Chapter 8, "Create a Coupon Promotion".

- **Product** - An offer to receive monetary savings in exchange for the purchase of specific merchandise. For more information about creating a Product Promotion, see page 1 in Chapter 9, "Create a Product Promotion".

- **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 page 1 in Chapter 11, "Create a Message Promotion".

- **Award** - An offer in which certain Customers are awarded an e-award or entitlement coupon. For more information about creating an Award Promotion, see page 1 in Chapter 10, "Create an Award Promotion".

Promotion Window

The Promotion Window displays information about the selected Promotion and provides access to actions that can be performed on the Promotion.
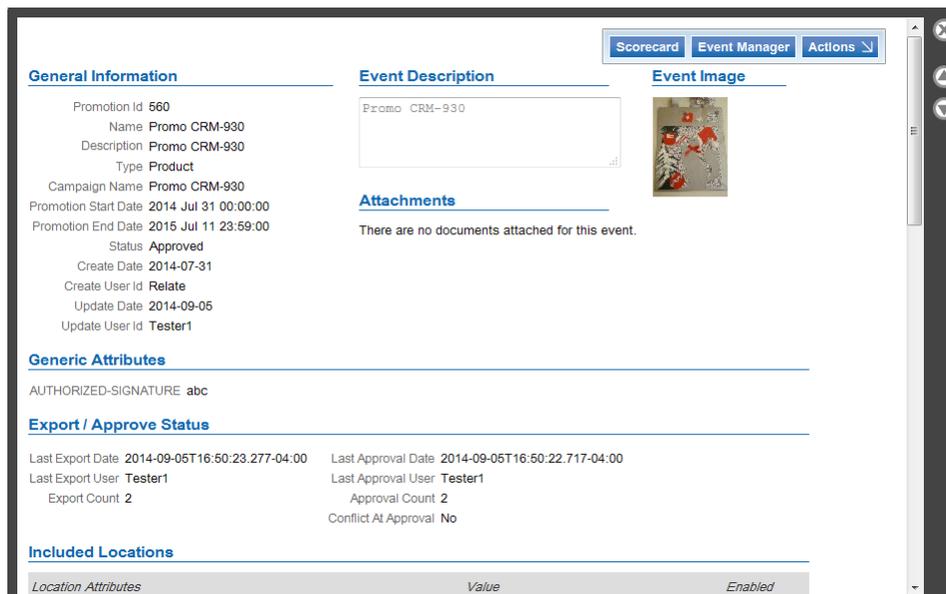
Figure 7-4: Promotion Window

The Promotion Window can include the following information about the Promotion:

> **Note:** Depending upon the configuration and/or status of the Promotion, some information may not be displayed.

- **General Information** - General information about the Promotion. This includes the following information:

  - **Promotion Id** - Unique ID for the Promotion.

  - **Name** - The name of the Promotion.

  - **Description** - A description of the Promotion.

  - **Type** - The type of Promotion (Coupon, Product, Message, or Award).

- **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. *Displayed only if the Promotion uses the Clienteling Channel.*

- **Attachments** - [Link](#)s to files attached to the Promotion. D*isplayed only if the Promotion uses the Clienteling Channel.*

- **Event Image** - Displays an image associated with the Promotion. *Displayed only if the Promotion uses the Clienteling Channel.*

- **Generic Attributes** - The Generic Attributes assigned to the Promotion. This section displays the name of each Attribute assigned to the Promotion and its value.

- **Award Certificate** - The Certificate awarded by the Promotion. *This information is displayed only for Award Promotions.*

  - **Card Type Name** - Name of the Card Type receiving the Certificates.

  - **Award Program** - Award program receiving the Certificates.

  - **Coupon Prefix** - The prefix to assign to the coupon number.

  - **Certificate Type** - E-Award or Entitlement Coupon.

  - **Amount** - The amount of an e-award.

  - **Deal Coupon** - The description of an entitlement deal.

  - **Discount Type** - The type of discount offered for the promotion through the Deal Coupon.

  - **Issue Option** - Indicates which types of cards are eligible for the award program.

  - **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.

- **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. The Enable Promotion Conflict property controls this option. See the *Implementation Guide* for more information.

- **Included Locations** - The Locations included in the Promotion. This <u>List</u> 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 <u>List</u> 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 a Product or Coupon Promotion. This <u>List</u> displays the following information for each Deal:

  > **Tip:** Click a deal in the Associated Deals <u>List</u> to open the Deal in a <u>Deal Window</u> (see <u>Deal Window</u> for more information).

  - **Deal ID** - The numeric ID of the Deal.

  - **Deal Name** - The name of the Deal.

  - **Deal Type** - The type of Deal.

  - **Deal Code** - The Deal Code for the Deal.

  - **Coupons Defined** - The number of Coupons defined for the Deal. *This field is displayed only for Coupon Promotions.*

    The field value provides a <u>Link</u> to <u>View Coupon Codes</u> for the Deal.

  - **Enabled** - Indicates whether the Deal is enabled for the Promotion.

  - **Serialized Coupons** - Indicates whether the Coupons are serialized. *This field is displayed only 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 displayed only 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 displayed only for dynamically targeted Promotions.*

  Target List - This <u>List</u> 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.

- **Batch exporter filenames** - The filenames selected for batch export at the Export Channels step in Promotion creation. Displayed regardless of whether the export files have been generated.

  - **Deals** - Contains information on the Deals associated with the Promotion. Displayed only if Deals have been associated with the Promotion.

  - **Deals and Promo-Deals Attributes** - Contains information on the Attributes for the Deals associated with the Promotion. Displayed only if Attributes have been selected for Deals associated with the Promotion.

  - **Promotion** - Contains information on the Promotion.

  - **Promotion Customer Targets** - Contains a listing of the Customers selected as Targets for the Promotion. Displayed only if Targets were selected for the Promotion.

  - **Serialized Coupons** - Contains a listing of the Serialized Coupons for the Promotion. Displayed only if Serialized Coupons were enabled for the Promotion.

  - **Award Coupons** - Contains information on EAward / Entitlement coupons.

    See Bulk Export to Batch for information on batch export of promotions.

- **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:

Note: 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.

- **Copy** - Open an editable copy of the Promotion. See Copy a Promotion.

- **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.

| Edit |
| Copy |
| Create Coupons |
| Approve |
| Export Promotion Definition |
| Export To Batch |
| Terminate |

- **Create Coupons** - Create additional Serialized Coupons for the Promotion (this option only appears if the Promotion awards Serialized Coupons). See Create Coupons.

- **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.

- **Approve** - Approve the Promotion (this option only appears if the Promotion has not been approved). See Approve a Promotion.

- **Export Promotion Definition** - Export the definition of the Promotion. See Export a Promotion Definition.

- **Export To Batch** - Export details of the Promotion. See Export a Promotion to Batch.

- **Terminate** - Terminate the Promotion. See Terminate a Promotion.
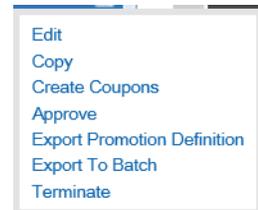
View Coupon Codes

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 <u>Window</u> displays a <u>List</u> 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 <u>Window</u> displays the following information for each Coupon Code in the <u>List</u>:

- **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 <u>Promotion Window</u> to open the <u>Promotion Scorecard</u> for a Promotion from the <u>Promotion Window</u>. The Promotion is then opened in the <u>Promotion Scorecard</u>.

Update a Promotion

To update a Promotion, click **EDIT** in the <u>Actions Menu</u> in the <u>Promotion Window</u>.

The Promotion opens in the Promotion <u>Wizard</u>, with all of the editable fields populated with the current Promotion configurations.

- Use <u>Wizard Navigation</u> to move through the <u>Wizard</u>.

- Make any necessary changes.

- Click **save** when you are finished making changes. The <u>Wizard</u> closes, saving the entered configurations and returning to the <u>Promotion List</u>.

- Click **cancel** to exit the <u>Wizard</u> and return to the <u>Promotion List</u> without saving the changes.

For more information about the fields and information to be entered, see <u>Create a Promotion</u>.

Copy a Promotion

To create a new Promotion with the same configurations as the current Promotion:

> **Note:** 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, Customer Engagement prompts for the new **End Date** and **End Time**.

Figure 7-7: New End Date and Time

   1) Select the new **End Date** for the existing Promotion in the Calendar Menu.

   2) Select the new **End Time** for the existing Promotion in the Time Menus.

3. Click **next**.

4. Edit the Promotion.

   - Use Wizard Navigation to move through the Wizard.

   - Make any necessary changes.

   - Click **save** when you are finished making changes. The Wizard closes, saving the new Promotion and returning to the Promotion List.

   - Click **cancel** to exit the Wizard and return to the Promotion List without saving the new Promotion.

   For more information about the fields and information to be entered, see Create a Promotion.

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 page 1 in Chapter 19, "Process Queue" 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.

Create Coupons: DEV-SerializedPromo (249)					
Deal Id	**Deal Name**	**Deal Type**	**Coupon Code**	**Current Count**	**Additional Coupons**
182	MK 913 Subtotal	SUBTOTAL_DISCOUNT	AB001	23	0
183	MK Test	LINE_ITEM_DISCOUNT	AB002	20	0
					Cancel Create Coupons

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 page 1 in Chapter 19, "Process Queue" for more information).

> Job successfully submitted. Please check the process queue.

Figure 7-9: Job Submitted Successfully

Conflict Report

To view a Conflict Report, click **Conflict Report** in the <u>Actions Menu</u> for the <u>Promotion Window</u>. If the Promotion has conflicts, the Conflict Report opens.
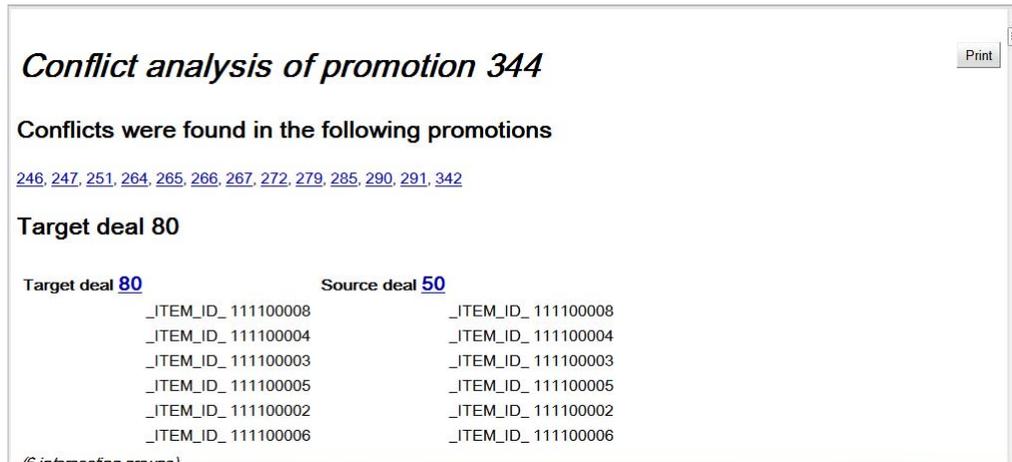
Figure 7-10: Conflict Report

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 Definition

To export a Promotion Definition, click **Export Promotion Definition** in the Actions Menu for the Promotion Window. The definition of the Promotion is exported, and is listed as an Export Promotion at the Process Queue page.

See Bulk Export Promotion Definition for a description of the information included in the export file.

This option is not available for an Award Promotion.

Export a Promotion to Batch

To export a Promotion to batch, click **Export to Batch** in the Actions Menu for the Promotion Window to export details about the Promotion, including Promotion Deals, Promotion Deal Attributes, Promotion Targets, and Promotion Serialized Coupons. The files are all listed at the Process Queue page under the Promotion Batch Export job for the Promotion.

This option is available only if one or more types are selected for the Supported Batch Exporter Types property.

See Bulk Export to Batch for a description of the information included in the export files.

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 about the Customer response to a Promotion. If you are associated with a Franchisee, the response and transaction totals displayed are based on your Franchisee.

If Include Social Listening is selected for the Promotion, 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.

Scorecard

The Scorecard tab displays the following information:

Figure 7-11: Scorecard Tab

- **Promotion Scorecard: [Promotion Name (Promotion ID)]** - This section contains basic information about the Promotion.

  - **Campaign Id** - ID number of the Campaign to which the Promotion belongs.

  - **Campaign Name** - Name of the Campaign to which the Promotion belongs.

  - **Promotion Id** - ID number of the Promotion.

  - **Promotion Name** - Name of the Promotion.

- **Response Summary** - This section contains information about the responses to the Promotion. This information can be updated through the Promotion Response Data Import task.

  A separate List of totals is provided for **Active Customers** and **Inactive Customers**. A customer might be inactive through a customer merge, dynamic target job processing, or customer deletes.

  If you are associated with any Franchisees, the totals in this section include customers that belong to your Franchisee(s).

  - **Target Name** - Name of the Target. A Target name ending in _CTL indicates a control group. Non-Targeted is displayed as the Target Name for customers who responded to the Promotion but were not included in Target Groups.

  - **Total** - Number of Customers to whom emails were sent because they were in the Target Group. For Non-Targeted totals, this is the number of non-targeted customers who responded.

  - **Sent** - Number of emails sent. This total is 0 for Non-Targeted customers.

  - **Opened** - Number of emails opened.

  - **Clicked** - Number of emails clicked on.

  - **Undeliverable** - Number of emails that could not be delivered.

  - **Net Targeted** - Total customers - Undeliverable emails.

  - **Net Delivery** - Total number of emails Sent - Undeliverable emails.

- **Respondents** - Number of Customers in the Target who have responded to the Promotion. This is the same as the Total for Non-Targeted customers.

- **Non-Respondents** - Number of Customers in the Target who have not responded to the Promotion. This is 0 for Non-Targeted customers.

- **Net Response Rate** - Calculated by dividing the total number of Respondents by the Net Delivery total. Set to 0.00 for Non-Targeted customers.

- **Response Rate** - Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.

- **Award Value** - The total value of Awards issued through the promotion. Included only for an Award Promotion.

- **Redeemed Award Value** - The total value of Awards redeemed. Included only for an Award Promotion.

- **Financial Summary** - This section contains a List displaying financial data about the Segment Target responses to the Promotion, as well as costs associated with the Promotion. This List displays the following information for each Target group:

  If you are associated with any Franchisees, the totals in this section include transactions that took place in locations associated with your Franchisee.

  - **Target Name** - Name of the Target. Non-Targeted is displayed as the Target Name for customers who responded to the Promotion, but were not included in Target Groups. Unidentified is displayed as the Target Name for customers who responded to the Promotion, but do not exist in Customer Engagement.

  - **Direct Revenue** - Direct Revenue received from the Target: the total extended selling price of all line items sold for the Target that were associated with the Promotion.

  - **Indirect Revenue** - Indirect Revenue received from the Target: the total extended selling price of all line items that were not associated with the Promotion.

  - **Total Revenue** - Total Revenue (Direct + Indirect) received from the Target.

  - **Cost Of Goods Sold** - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue.

  - **Markdowns** - Value of markdowns applied to Indirect line items.

  - **Gross Profit** - Gross Profit of sales made to the Target: Total Revenue - Cost Of Goods Sold.

  - **Margin %** - Profit percentage of sales made to the Target: Gross Profit / Total Revenue.

  - **Net Profit** - Net Profit of sales made to the Target: Gross Profit - Promotion Cost.

  - **Promotion Cost** - Cost of the Promotion for the Target. Calculated for each Target group as follows:

    1) Determine the percentage of the Total Revenue for the Promotion that is made up of the Total Revenue for the Target. For example, if the Total Revenue for the Promotion is $100,000, and the Total Revenue for the Target is $25,000, then this percentage is 25.00%.

    2) Use this percentage to allocate the Target's share of the Promotion's actual cost (Actual Amount) from the Event-level Budget. For example, if the Actual Amount is $40,000, then 25% of this Actual Amount is $10,000.

3) Determine the Target's Actual cost per Channel. For example, $4,000.00.

4) Calculate the CPM for the Target-level Actual cost per Channel to determine the Actual cost per Target Customer. For example, the CPM based on the Target-level Actual cost is $4000.00, so the Target-level Actual CPM is $4.00 If there are 500 Customers in the Target, the result is $2,000.00.

5) Add the Target's share of the Promotion's Actual cost (step 2) + the Target-level Actual cost per Channel for each Channel (step 3) + the total Target-level Actual cost based on number of Target Customers and CPM (step 4) to determine the Promotion Cost per Target. In the examples above, this would be $10,000 + $4,000 + $2,000, or $16,000.

- **Deal Summary** - This section contains information about the Deals used by the Promotion, and the resulting revenue. These Deals are organized by Target.

The following information is displayed for each Target:

Target: - The name of a Target for the Promotion.

> **Note:** The Target may be a Customer Segment 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: the total extended price of all line items associated with the Deal for the Target.
- **Coupon List** - Additional information is included for a Coupon Promotion. 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 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: Direct Revenue for Coupon / Transactions for Coupon.
  * **Coupon Revenue** - Total amount of line items using the Coupon Code.
  * **Estimated Distribution** - Estimated Distribution specified for Media for the Coupon.
  * **Response %** - Percentage of Coupons distributed that have been redeemed, calculated by dividing the Respondents by the Estimated Distribution.

- **Additional Metrics** - This section displays a [List] of additional sales metrics for the Promotion.

If you are associated with any Franchisees, this section is displayed only if all your Franchisees are associated with the Promotion.

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. Calculated based on the Budget information defined for the Target:

  1) Determine the Fixed Actual cost for the Target and Channel.

  2) Determine the CPM Actual cost for the Target and Channel, divided by 1000 and then multiplied by the number of Targeted customers.

  3) Determine the Target Revenue % by dividing the Total Target Revenue by the Total Revenue.

  4) Determine the Promotion Level Cost by multiplying the Promotion Level Actual Cost by the Target Revenue %, calculated in the previous step.

  5) Add the Fixed Actual cost (step 1) + the CPM Actual cost (step 2) + the Promotion Level Cost (step 4).

  6) Determine the Promotion Cost Per Targeted Customer by dividing the result of step 5 by the number of targeted customers.

- **Promotion Cost Per Responded Customer** - Cost of the Promotion per Customer who responded to the Promotion. The calculation is very similar to the Promotion Cost Per Targeted Customer, except that the response total is used instead of the targeted total:

  1) Determine the Fixed Actual cost for the Target and Channel.

  2) Determine the CPM Actual cost for the Target and Channel, divided by 1000 and then multiplied by the number of responses.

  3) Determine the Target Revenue % by dividing the Total Target Revenue by the Total Revenue.

  4) Determine the Promotion Level Cost by multiplying the Promotion Level Actual Cost by the Target Revenue %, calculated in the previous step.

  5) Add the Fixed Actual cost (step 1) + the CPM Actual cost (step 2) + the Promotion Level Cost (step 4).

  6) Determine the Promotion Cost Per Responded Customer by dividing the result of step 5 by the number of responding customers.

- **Revenue Per Targeted Customer** - Revenue received per Customer who was targeted by the Promotion: the Target's Direct Revenue / the total Targeted customers.

- **Revenue Per Responded Customer** - Revenue received per Customer who responded to the Promotion: the Target's Direct Revenue / the total responding customers.

- **Net Profit Per Targeted Customer** - Net Profit per Customer who was targeted by the Promotion: the Target's Gross Profit - the Promotion Costs / the total Targeted customers.

- **Net Profit Per Responded Customer** - Net Profit per Customer who responded to the Promotion: the Target's Gross Profit - the Promotion Costs / the total responding customers.

Facebook Scorecard

The Facebook Scorecard tab displays the social listening results for one social profile on Facebook.

This tab is available if the Enable Social Media Access property is selected, Facebook is enabled through the Social Media Types property, and the user has access through the PromotionSocialListeningAdmin role.

Use the **Social Profile** Selection Menu to select the social profile to view.

The Facebook Scorecard displays the following information for the Promotion:
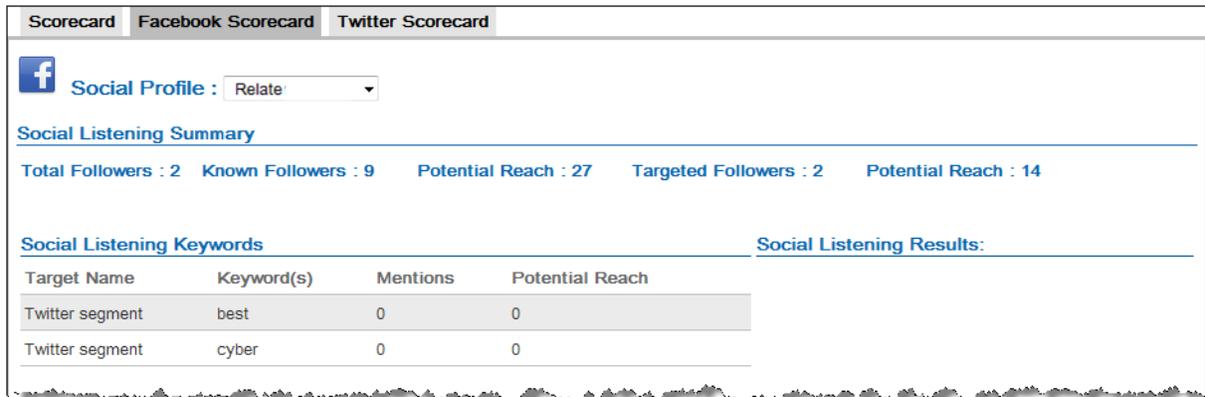
Figure 7-12: Facebook Scorecard Tab

- **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 Customer Engagement database.

  - **Known Followers** - Number of Customers in Customer Engagement 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.

This tab is available if the Enable Social Media Access property is selected, Twitter is enabled through the Social Media Types property, and the user has access through the PromotionSocialListeningAdmin role.

Use the **Social Profile** Selection Menu to select a social profile to view.

The Twitter Scorecard displays the following information for the Promotion:
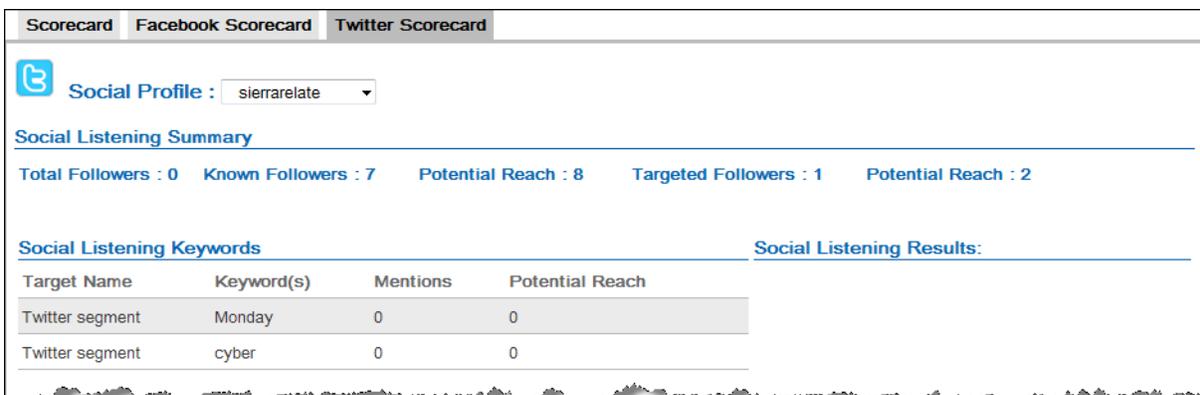
Figure 7-14: Twitter Scorecard Tab

- **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 Customer Engagement database.
  - **Known Followers** - Number of Customers in Customer Engagement 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

> **Note:** The Event Manager can only be opened for Promotions in which, during the Export Channels step in the <u>Create a Promotion</u> procedure, the **Clienteling Channel** option was enabled for at least one Target.

The Event Manager allows Users to view a Promotion Event and manage Event Tasks created by and associated with a Promotion. The Event Manager displays the following information:

Figure 7-16: 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** - [Link](#)s 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](#).
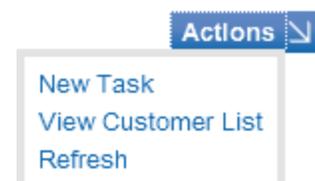
- **View Customer List** - View the list of Customers associated with the Promotion Event. See Contact List.

- **Refresh** - Refresh the screen to view any updates.

Open a Task

To open a Task in the Event Manager, click the Task in the Task List. The Task opens in an Edit Task Window.

Open Promotion Scorecard

To open the Promotion Scorecard for the Promotion associated with the Promotion Event, click, the **SCORECARD** button. The Promotion is opened in a Promotion Scorecard.

Add a Task

To add a Task to a Promotion Event:

1. Click the **New Task** button in the Event Manager Actions Menu.

   A Create New Task Window opens.

Figure 7-17: Create New Task Window

2. Enter the information for the Task:

   Note: 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.

- **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.

> **Tip:** Use this field to automatically set the End Time to a time, of the selected duration, after the selected Start Time. The End Time Time Menus cannot be edited directly.

3. If necessary, assign a User to the Task (see Add/Change User). 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). 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). 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.

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:

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 <u>List</u> 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 <u>List</u> 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 <u>List</u> 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. <u>Open a Task</u> in the Event Manager.

   The Task opens in an <u>Edit Task Window</u>.

2. Make updates to the fields.

   The following fields can be updated:

   - **Location** - This <u>Selection Menu</u> determines the Location where the Task is to be performed.

   - **Status** - The status of the Task.

   - **Duration** - The duration of the Task.

     Tip: Use this field to automatically set the End Time to a time, of the selected duration, after the existing Start Time.

   - **Assigned User** - A <u>List</u> containing the User assigned to the Task.

     * To add or change the User assigned to a Task, see <u>Add/Change User</u>.

     * To delete an assigned User, see <u>Remove a User</u>.

   - **Assigned Customer** - A <u>List</u> displaying the Customer assigned to the Task.

- - * To add or change the Customer associated with a Task, see <u>Add/Change Customer</u>.

    * To delete a Customer association, see <u>Remove a Customer</u>.

  - **Notes** - A <u>List</u> containing Notes added to the Task.

    * To add a note to a Task, see <u>Add a Note</u>.

3. Click the **Save** button when you are finished.

   The changes are saved and the <u>Window</u> closes.

8

Create a Coupon Promotion

To create a Coupon Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

   The New Promotion Wizard opens on the Promotion Type step.

Figure 8-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Coupon**.

3. Use the **Enable Serialized Coupon Management** Check Box to indicate whether the Coupon Promotion will use Serialized Coupons. *This Check Box is only available if the Serialized Coupon Enabled Flag configuration is set to **Yes**.* See the *Implementation 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.

> **Note:** This Check Box is only available if social media access has been enabled in **System Configuration**, and the User has been assigned the SystemAdmin and/or PromotionSocialListeningAdmin Role. See the *Implementation Guide* for more information about **System Configuration**, 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** - Customer Engagement will automatically create a new Campaign.

- **Associate promotion with existing campaign** - Select a previously-created Campaign to associate with the Promotion.

  If you select this option, a Campaigns Selection Menu opens.
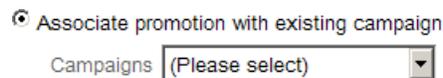
Figure 8-4: Campaigns Dropdown Menu

  Select the Campaign you are associating with this Promotion using the **Campaigns** dropdown menu.

- **Create a new campaign for this promotion** - Manually create a new Campaign that will then be associated with this Promotion.

  If you select this option, Name and Description fields open.

Figure 8-5: Create Campaign Fields

  1) Enter the **Name** of the Campaign in the Name field.

  2) Enter a **Description** of the Campaign in the Description field.

8. Click **next**.

The Start/End Date step opens.

9. Configure the Start and End Dates for the Promotion:

Figure 8-6: Start/End Date Step

a. Select the **Start Date** for the Promotion using the Start Date <u>Calendar Menu</u>.

b. Select the **Start Time** for the Promotion using the Start Time <u>Time Menus</u>.

c. Select the **End Date** for the Promotion using the End Date <u>Calendar Menu</u>.

d. Select the **End Time** for the Promotion using the End Time <u>Time Menus</u>.

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.

    Note: See the *Implementation Guide* for more information about Franchisee support.

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

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.

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.

- For more information about Location Eligibility Rules, see Location Eligibility.

17. Click **next**.

The Associate Deals step opens.

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

Figure 8-10: Associate Deals Step

a Click the **Add** button.

A Deal List Window opens.
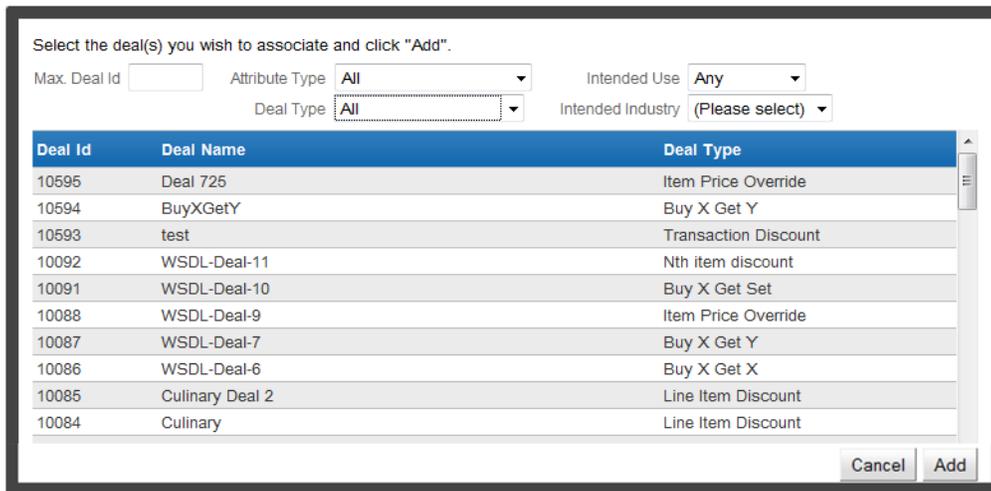
Figure 8-11: Deal List Window

e. 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 Customer Engagement. 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 <u>Selection Menu</u> filters the <u>List</u> by the intended industry of the Deal: either **Merchandise** or **Culinary**.

  f. Click a Deal to select it. You can select multiple Deals.

  g. Click the **Add** button to add the Deal(s) to the Promotion, or click the **Cancel** button to exit the <u>Window</u> without changing the <u>List</u> of Deals associated with the Promotion.

Deal Id	Deal Name	Deal Type	Deal Code	Enabled
260	0907_51	Line Item Discount		☑

Figure 8-13: Deal Added

  h. If necessary, return to step a to add another Deal to the Promotion.

19. For each Deal in the Associated Deals <u>List</u> that will have a Deal Code assigned to it, enter that Code in the **Deal Code** <u>Text Field</u>.

20. For each Deal in the Associated Deals <u>List</u>, use the **Enabled** <u>Check Box</u> 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** <u>Check Box</u> 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 (Ring Code) Management, click the **Get next coupon id** Link to add a sequentially-generated Coupon Code. See the *Implementation 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. Deal Groups are available only if Promotion Coupon (Ring Code) Management is enabled. See the *Implementation Guide* for more information about this configuration. 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.
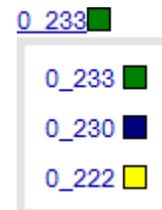
30. Click **next**.

    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 16.

If you did not select **Include Social Listening**, continue with .

* **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.

> **Important:** The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `PromotionDynamicTargetAdmin` or `SystemAdmin` Role. See the *Implementation 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 the following step.

* **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.

> **Important:** The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See Dynamic Promotions for more information.

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.

> **Note:** 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.

       *   For more information about Segment Eligibility Rules, see Segment/Target Eligibility.

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 .

33. Define the Target Filter for each Segment Target:

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.

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.

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.).

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	%
(-67)	*0.00%*
2666	33.33
2600	32.50
2667	33.34
(+500)	*100.00%*
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

Important: 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 .

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

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.

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.

Figure 8-27: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.

- **E-Mail/Batch Exporter** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email or through a separate system, with notification through a batch export.

   If this Check Box has a checkmark (☑), batch exporter file names are displayed.

Figure 8-28: Batch Exporter Filenames Options

The following export filenames are configurable:

* **Promotion Export filename** - Contains information on the Promotion.

* **Targets Export filename** - Contains a listing of the Customers selected as Targets for the Promotion. Displayed only if Targets were selected for the Promotion.

* **Deals Export filename** - Contains information on the Deals associated with the Promotion. Displayed only if Deals have been associated with the Promotion.

* **Deals and Promo-Deals Attributes Export filename** - Contains information on the Attributes for the Deals associated with the Promotion. Displayed

only if Attributes have been selected for Deals associated with the Promotion.

* **Serialized Coupons Export filename** - Contains a listing of the Serialized Coupons for the Promotion. Displayed only if Serialized Coupons were enabled for the Promotion.

For each filename, you can override the following defaults:

* **Prefix** - Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Prefix property setting. See the *Implementation Guide* for more information.

* **Static Name** - The identifying filename. Defaults from the related property: Responsys Promotion Deals Attributes Sync Default Filename, Responsys Promotion Deals Sync Default Filename, Responsys Promotion Serialized Coupon Sync Default Filename, Responsys Promotion Sync Default Filename, or Responsys Promotion Targets Sync Default Filename. See the *Implementation Guide* for more information.

* **Suffix** - Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Suffix property setting. See the *Implementation Guide* for more information.

See Bulk Export to Batch in the "Promotions" chapter for details on the generated export files.

- **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.

Target Name	Mail	E-Mail / Batch Exporter	Phone	Channel Filter		
					Location Channel ⦿ Filter ☐	
					Associate Channel ○	
ZIP20500	☐	☐	☐	☑		

Figure 8-29: 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 <u>Check Box</u> determines whether the export channel is filtered. If this <u>Check Box</u> has a checkmark (☑), additional Channel Filter options are displayed.

Figure 8-30: 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 <u>Selection Menu</u> has the following options:

  Random - [DEFAULT] Select Customers randomly.

  Top - Recent Purchase - Filter the Customers based on the most recent purchases.

  Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

  Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

* **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

Figure 8-31: Numeric Attribute Filter

41. Click **next**.

    - If **Include Social Listening** was selected, the Social Listening step opens. Continue with <u>step 42 on page 16</u>.

    - If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with <u>step 46 on page 18</u>.

    - If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with <u>step 48 on page 19</u>.

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

Figure 8-32: 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:

Important: 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 8-33: Social Listening Schedule Step

    a. Select the **Job Execution Frequency** using the <u>Selection Menu</u>.

        * **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** <u>Calendar Menu</u> 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** <u>Calendar Menu</u> 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** <u>Selection Menu</u> to select the day of the week on which the job will run. Continue with step f.

    e. Use the **Day of Month** <u>Selection Menu</u> to select the day of the month on which the job will run.

    f. Use the **Job Execution Time** <u>Time Menus</u> to determine the time at which the job will run.

        Tip: It is recommended that you select a time that is within the <u>Job Processing Window</u>. If you select a time outside the <u>Job Processing Window</u>, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

    g. Use the **Override Job Processing Window** <u>Check Box</u> 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 .

46. Configure the Event Definition.

Figure 8-34: 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. Only files with the file extensions of jpg, jpeg, png, pdf, doc, docx, xls, and xlsx can be uploaded.

   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 8-35: 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 8-36: Budget Step for an Untargeted 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			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 8-37: 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	
			Delete
	0.00	0.00	

Add

Figure 8-38: 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 Generic Attributes step opens if there are any required or optional Promotion Attributes defined.

.

Promotion Franchisees	Generic Attributes	Associated Locations

◀◀ previous   save   cancel   next ▶▶

Generic Attributes

Required

Optional

XYZ12345   Northeast Outlet Stores
             Yes ▼   Delete

Figure 8-39: Generic Attributes Step

a. Configure any required or optional promotion attributes.

1) To add an Attribute, click the **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.

4) To delete an Attribute, click the **Delete** button.

   5) To change the configuration value for an Attribute, select or enter the new configuration value.

50. Click **next**.

51. Click **next**.

   The Options After Save step opens.

52. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

Figure 8-40: 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 or marketing 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** - Customer Engagement will only export the Customers added to the Promotion event by the Dynamic Promotions Job.

      * **Output All Updates** - Customer Engagement will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

53. Click **next**.

   The Review step opens.

54. 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.

9

Create a Product Promotion

To create a Product Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

   The New Promotion Wizard opens on the Promotion Type step.

Figure 9-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Product**.

3. Click **next**.

   The General Information step opens.

4. Configure the General Information for the Promotion:

Figure 9-2: General Information Step

   a. Enter the **Name** of the Promotion in the Name Text Field.

   b. Enter a **Description** of the Promotion in the Description Text Field.

    c. Use the **Social Listening** <u>Check Box</u> to indicate whether social-media listening features will be enabled for the Promotion.

> **Note:** This <u>Check Box</u> is only available if social media access has been enabled in **System Configuration**, and the User has been assigned the SystemAdmin and/or PromotionSocialListeningAdmin Role. See the *Implementation Guide* for more information about **System Configuration**, configuring social media access, and User Roles.

5. Click **next**.

The Campaign step opens.

6. Select how the Campaign should be associated with the Promotion:

Figure 9-3: Campaign Step

- **Auto create campaign** - Customer Engagement 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 <u>Selection Menu</u> 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 <u>Calendar Menu</u>.

b. Select the **Start Time** for the Promotion using the Start Time <u>Time Menus</u>.

c. Select the **End Date** for the Promotion using the End Date <u>Calendar Menu</u>.

d. Select the **End Time** for the Promotion using the End Time <u>Time Menus</u>.

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.

     Note: See the *Implementation Guide* for more information about Franchisee support.

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

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.

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 <u>Define Location Eligibility</u>.

   - For more information about Location Eligibility Rules, see <u>Location Eligibility</u>.

16. Click **next**.

   The Associate Deals step opens.

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

Figure 9-10: Associate Deals Step

a   Click the **Add** button.

A Deal List Window opens.
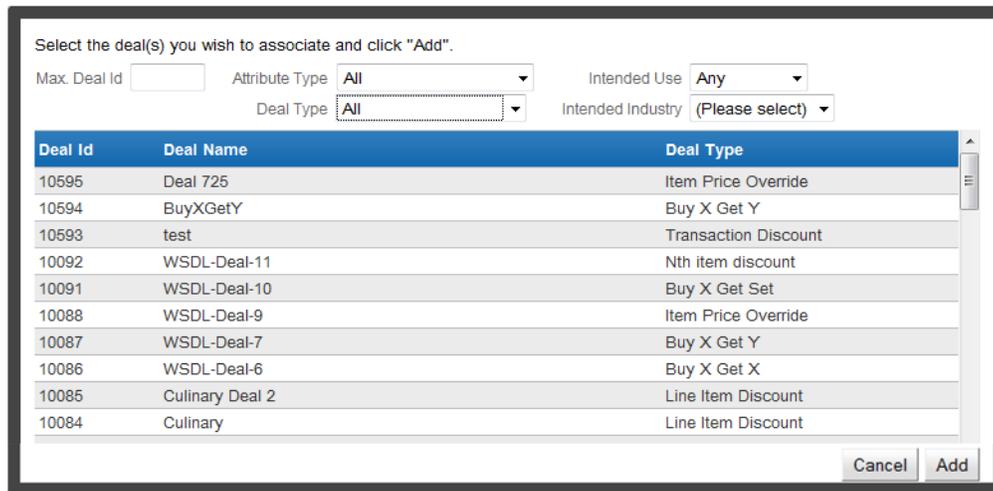
Figure 9-11: Deal List Window

e.   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 Customer Engagement. 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**.

    f. Click a Deal to select it. You can select multiple Deals.

    g. Click the **Add** button to add the Deal(s) to the Promotion, or click the **Cancel** button to exit the Window without changing the List of Deals associated with the Promotion.

Deal Id	Deal Name	Deal Type	Deal Code	Enabled
260	0907_51	Line Item Discount		☑

Figure 9-13: Deal Added

    h. If necessary, return to step a 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 <u>Radio Buttons</u> to select the type of Targets.

* **Untargeted** - **[DEFAULT]** The Promotion has no Segment Targets.

  If you selected **Include Social Listening**, continue with <u>step 34 on page 15</u>.

  If you did not select **Include Social Listening**, continue with <u>step 40 on page 18</u>.

* **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** <u>Radio Buttons</u> open, continue with step c.

Figure 9-16: Targeting Type

* Otherwise, continue with step e.

Important: The Targeting Type <u>Radio Buttons</u> will only open if Dynamic Targeting is enabled, and you have been assigned either the PromotionDynamicTargetAdmin or SystemAdmin Role. See the *Implementation 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 the following step.

* **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the <u>Dynamic Promotions</u> Job runs.

Important: The <u>Dynamic Promotions</u> Job should not be run on the same day after a Dynamic Promotion is generated. See <u>Dynamic Promotions</u> for more information.

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.

Note: 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.

* For more information about Segment Eligibility Rules, see Segment/Target Eligibility.

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 .

25. Define the Target Filter for each Segment Target:

Coupon Codes	Define Targets	Define Target Filtering	Split Targets	C

◄◄ previous save cancel next ►►

Define Target Filtering

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 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.

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.

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	%	
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 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	%
(-67)	*0.00%*
2666	33.33
2600	32.50
2667	33.34
(+500)	*100.00%*
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

Important: 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 12.

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

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.

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.

Figure 9-26: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.

- **E-Mail/Batch Exporter** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email or through a separate system, with notification through a batch export.

If this Check Box has a checkmark (☑), batch exporter file names are displayed.

Please specify filenames for batch exporter files

Promotion Export filename
    Prefix   yyyy-MM-dd_HHmmss   Static Name   -PromotionSync   Suffix   None
    Filename   {yyyy-MM-dd_HHmmss}-PromotionSync

Targets Export filename
    Prefix   yyyy-MM-dd_HHmmss   Static Name   -PromotionTargetsSync   Suffix   None
    Filename   {yyyy-MM-dd_HHmmss}-PromotionTargetsSync

Deals Export filename
    Prefix   yyyy-MM-dd_HHmmss   Static Name   -PromotionDealsSync   Suffix   None
    Filename   {yyyy-MM-dd_HHmmss}-PromotionDealsSync

Deals and Promo-Deals Attributes Export filename
    Prefix   yyyy-MM-dd_HHmmss   Static Name   -PromotionDealsAttribute   Suffix   None
    Filename   {yyyy-MM-dd_HHmmss}-PromotionDealsAttrib...

Figure 9-27: Batch Exporter Filenames Options

The following export filenames are configurable:

* **Promotion Export filename** - Contains information on the Promotion.

* **Targets Export filename** - Contains a listing of the Customers selected as Targets for the Promotion. Displayed only if Targets were selected for the Promotion.

* **Deals Export filename** - Contains information on the Deals associated with the Promotion. Displayed only if Deals have been associated with the Promotion.

* **Deals and Promo-Deals Attributes Export filename** - Contains information on the Attributes for the Deals associated with the Promotion. Displayed only if Attributes have been selected for Deals associated with the Promotion.

For each filename, you can override the following defaults:

* **Prefix** - Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Prefix property setting. See the *Implementation Guide* for more information.

* **Static Name** - The identifying filename. Defaults from the related property: Responsys Promotion Deals Attributes Sync Default Filename, Responsys Promotion Deals Sync Default Filename, Responsys Promotion Serialized Coupon Sync Default Filename, Responsys Promotion Sync Default Filename, or Responsys Promotion Targets Sync Default Filename. See the *Implementation Guide* for more information.

* **Suffix** - Indicates the format of the datetime stamp used as a suffix to the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Suffix property setting. See the *Implementation Guide* for more information.

See Bulk Export to Batch in the "Promotions" chapter for details on the generated export files.

- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.

- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

   If this Check Box has a checkmark (☑), Channel Filter options are displayed.

Figure 9-28: 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.

Figure 9-29: 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.

<div align="center">**Figure 9-30: Numeric Attribute Filter**</div>

33. Click **next**.

    - If **Include Social Listening** was selected, the Social Listening step opens. Continue with .

    - If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with .

    - If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with .

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

<div align="center">**Figure 9-31: Social Listening Step**</div>

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:

> **Important:** 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 9-32: 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** <u>Selection Menu</u> to select the day of the week on which the job will run. Continue with step f.

  e. Use the **Day of Month** <u>Selection Menu</u> to select the day of the month on which the job will run.

  f. Use the **Job Execution Time** <u>Time Menus</u> to determine the time at which the job will run.

> **Tip:** It is recommended that you select a time that is within the <u>Job Processing Window</u>. If you select a time outside the <u>Job Processing Window</u>, the Override Job Processing Window setting (see step g) must be checked (☑) for the job to run.

  g. Use the **Override Job Processing Window** <u>Check Box</u> 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 <u>step 40 on page 18</u>.

38. Configure the Event Definition.

Figure 9-33: 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** <u>Link</u>.

   The Update Image <u>Window</u> opens.

   2) Select the **Action** using the <u>Radio Buttons</u>.

   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** <u>File Upload</u> field to select the file to import.

   4) Click the **Done** button to save the changes and close the <u>Window</u>.

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. Only files with the file extensions of jpg, jpeg, png, pdf, doc, docx, xls, and xlsx can be uploaded.

3) Click the **Upload file** button to save the changes and close the Window.

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

d. To remove a document from the Event Documents List, click the **Remove** Link for the document.

Figure 9-34: 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:

Figure 9-35: Budget Step for an Untargeted Promotion

Figure 9-36: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

Figure 9-37: 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.

41. Click **next**.

The Generic Attributes step opens if there are any required or optional Promotion Attributes defined.

.

Figure 9-38: Generic Attributes Step

    a. Configure any required or optional promotion attributes.

        1) To add an Attribute, click the **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.

        4) To delete an Attribute, click the **Delete** button.

        5) To change the configuration value for an Attribute, select or enter the new configuration value.

42. Click **next**.

43.

The Options After Save step opens.

44. In each <u>Check Box</u> and/or set of <u>Radio Buttons</u>, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

Figure 9-39: 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 or marketing systems.

- **Dynamic Promotion Options** - Export options for dynamic Promotions. These options only appear if the Promotion has dynamic Targets. Select the option using the <u>Radio Buttons</u>:

    * **Output Additions Only** - Customer Engagement will only export the Customers added to the Promotion event by the <u>Dynamic Promotions</u> Job.

    * **Output All Updates** - Customer Engagement will export all Customers either added to or updated in the Promotion event by the <u>Dynamic Promotions</u> Job.

45. Click **next**.

    The Review step opens.

46. Review the entered information to ensure that it is correct.

    - Click **save** to save the Promotion with its current configuration.

    - Use <u>Wizard Navigation</u> to return to an earlier step and make any necessary changes.

    - Click **cancel** to cancel the changes and return to the <u>Promotion List</u> without saving the Promotion.

10

Create an Award Promotion

Award promotions are based on award card definitions. Awards (EAwards or Entitlement deal awards) are issued when the Promotion is generated. If the Promotion is defined as **Issue to registered cards only**, the awards will be created for cards within the selected program that are associated to a customer when the promotion is generated. This type of promotion is considered exclusively targeted to the customers with those cards. The targeting step will be available to define filters and/or control groups if desired.

A segment can be added to filter the number of awards created. For example, an Award Program has 1,000 customers associated to cards, but this Promotion is only for those customers that live in Ohio. A segment can be defined for Ohio customers within that card program and added to the Promotion as **Included Targets**. In this case, only the customers that live in Ohio are included. An alternative is to add an **Excluded Target** segment, which could exclude all customers that live in New York. The promotion target can also be defined as Dynamic Targeting. If Dynamic Targeting is selected, any new customers that are associated to cards are dynamically added to the promotion target, and awards are issued when the Dynamic Promotion job is run.

If the promotion is defined to **Issue Coupons Dynamically**, the awards are created for activated cards within the selected program when the promotion is generated. The card does not need to be associated to a customer. This type of promotion is considered non-targeted, since a customer association is not required. The promotion targeting step is skipped. This type of promotion is automatically considered a Dynamic Promotion. For a Dynamic Promotion, any new cards within the selected program that are activated will have an award issued when the **Dynamic Promotion** job runs.

To create an Award Promotion, do the following:

1. Click **CREATE** in the upper-right corner of the Promotion List page.

    The New Promotion Wizard opens on the Promotion Type step.

Figure 10-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Award**.

3. Click **next**.

    The General Information step opens.

4. Configure the General Information for the Promotion:

Figure 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.

Note: This Check Box is only available if social media access has been enabled in **System Configuration**, and the User has been assigned the SystemAdmin and/or PromotionSocialListeningAdmin Role. See the *Implementation Guide* for more information about **System Configuration**, 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** - Customer Engagement 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 Award Certificate step opens. Continue with step 12.

- If Franchisee support is enabled, the Promotion Franchisees step opens. Continue with the next step. See the *Implementation Guide* for more information about Franchisee support.

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

Figure 10-7: Promotion Franchisees Step

11. Select **next**.

The Award Certificate step opens.

12. Configure the Award Certificate:

Figure 10-8: 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. Select a **Certificate Type** of either E-Award or Entitlement Coupon.

d. Use the **Deal Coupon** Selection Menu to select an Entitlement Deal associated with the selected Award Program. A Deal is available for selection and required only if the Certificate Type is set to Entitlement Coupon.

e. Enter a **Coupon Prefix** in the Text Field.

The **Discount Type** is displayed below the Coupon Prefix if the Certificate Type is Entitlement Coupon.

f. Enter the **Amount** of the award certificate in the Text Field if the Certificate Type is E-Award. No entry is supported for an Entitlement Coupon. See the *Implementation Guide* for more information about configuring the maximum Award amount.

    * If the amount entered is too close, the configured maximum Award amount, Customer Engagement will display a warning message:

Figure 10-9: Award Amount Warning

    * If the amount entered is greater than the configured maximum Award amount, Customer Engagement will display an error message and will not allow you to move to the next step.

Figure 10-10: Award Amount Error

13. Select **Issue to registered cards only?** if the promotion should be restricted to cards that are registered to customers. If this option is not selected, coupons will be issued to all active accounts for the selected Award Program, and the option to target the promotion will not be available.

14. Select **Issue coupons dynamically?** to have the option to issue coupons dynamically. If this option is selected, coupons will be issued to all accounts that are activated when the program is generated.

15. 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**.

Click **next**. The Define Targets step opens.

16. Define the Segment Target Eligibility Rules for the Promotion. This step is available only if you select **Issue to registered cards only** at the Award Certificate step.

Figure 10-11: Define Targets Step

a. Targeting is automatically set to **Exclusive**.

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

* If the **Targeting Type** Radio Buttons open, continue with step c.

Figure 10-12: Targeting Type

* Otherwise, continue with step e.

Important: The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `PromotionDynamicTargetAdmin` or `SystemAdmin` Role. See the *Implementation 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 the following step.

* **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the <u>Dynamic Promotions</u> Job runs.

Important: The <u>Dynamic Promotions</u> Job should not be run on the same day after a Dynamic Promotion is generated. See <u>Dynamic Promotions</u> for more information.

Dynamic Targeting Option <u>Radio Buttons</u> open.

Figure 10-13: Dynamic Targeting Option

Continue with step d.

d. Select the **Dynamic Targeting Option** for the Promotion.

* **Targets Added Only** - When the <u>Dynamic Promotions</u> 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 <u>Dynamic Promotions</u> 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.

Note: If Franchisee suppose is enabled and one more franchisees are defined for the promotion, only card types with the same franchisee ID's associated will be available to select for this promotion.

* For instructions on configuring Segment Eligibility Rules, see <u>Define Segment Eligibility</u>.

* For more information about Segment Eligibility Rules, see <u>Segment/Target Eligibility</u>.

Important: 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 Targeting Type is Static Targeting.

Important: If the Target Count is zero and the Targeting Type is Static Targeting, an error message is displayed and the User will not be able to move to the next step.

Figure 10-14: Award Target with Count of Zero

17. Click **next**.

   - If you selected **Static Filtering** (see above), the Define Target Filtering Step opens. Continue with the next step.

   - If you selected **Dynamic Targeting** (see above), the Control Groups step opens. Continue with .

18. Define the Target Filter for each Segment Target:

Figure 10-15: Define Target Filtering Step

   a. Select the **Filter Type** for each Segment:

   * **None** - **[DEFAULT]** All Customers in the Segment are eligible.

   * **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.

   * **Random** - Customers from the Segment will be chosen randomly for eligibility.

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

Figure 10-16: Enter Filter Count

19. Use the **Customer Household Consolidation** Selection Menu to indicate whether the Promotion will use household consolidation, and the rule for determining the Customer who is the head of household.

   This Selection Menu has the following options:

   - **None** - Do not perform household filtering.

   - **LT Sales** - Select head of household based on amount purchased over the lifetime of their account.

   - **LT Transaction Count** - Select head of household based on lifetime number of transactions.

   - **Last Transaction Date** - Select head of household based on the Customer who performed the most recent transaction.

- **Customer Attributes** - Select head of household based on the Customer's numeric attributes.

20. Click **next**.

The Split Targets step opens.

Figure 10-17: Split Targets Step

21. Filtered Targets can, optionally, be split into smaller, separate Targets. If necessary, create Splits for the filtered Targets in the Promotion:

a. Click **Split** for each Split to be created in the Target (click **Split** once for two Splits, click twice for three Splits, click three times for four Splits, etc.).

Figure 10-18: Splits

b. Optionally, change the name of the Split in the **Target Name** field for each Split.

c. Adjust the Split distribution as necessary:

* Change the number of Customers in each Split in the **Split Count** fields.

* Change the percentage of Customers in each Split in the **%** fields.

The total number of Customers in the Splits must equal the number of Customers in the target. If the numbers are not equal, Split Count will display the difference.

Figure 10-19: Split Counts Incorrect

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

22. Click **next**.

The Control Groups step opens.

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

Figure 10-20: Control Groups Step

Important: 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 .

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

Control Groups

○ None   ⦿ Promotion Level   ○ 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	0	0.00
Total	13000	13000	100%

Figure 10-21: Control Group - Promotion Level

If this option is selected, determine the size of the Control Group by doing one of the following:

* In the **New Count** field, enter the number of Customers in the Control Group.

* In the **%** field, enter the percentage of the Customers in the Control Group.

- **Target Level** - The Control Group Customers are pulled from each Split/Target in numbers specified individually for each Split/Target.

Control Groups

○ None   ○ Promotion Level   ⦿ 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 10-22: Control Group - Target Level

If this option is selected, determine the size of each Control Group by doing one of the following for each Split/Target:

* In the **Control Group Count** field, enter the number of Customers in the Control Group.

* In the **%** field, enter the percentage of the Customers in the Control Group.

24. Click **next**.

The Export Channels step opens.

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

Figure 10-23: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.

- **E-Mail/Batch Exporter** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email or through a separate system, with notification through a batch export.

    If this Check Box has a checkmark (☑), batch exporter file names are displayed.

Figure 10-24: Batch Exporter Filenames Options

The following export filenames are configurable:

* **Promotion Export filename** - Contains information on the Promotion.

* **Targets Export filename** - Contains a listing of the Customers selected as Targets for the Promotion. Displayed only if Targets were selected for the Promotion.

* **Promotion Award Coupons Export filename** - Contains a listing of award coupon IDs and associated customers.

For each filename, you can override the following defaults:

* **Prefix** - Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Prefix property setting. See the *Implementation Guide* for more information.

* **Static Name** - The identifying filename. Defaults from the related property: Responsys Promotion Sync Default Filename, Responsys Promotion Targets

Sync Default Filename, or Responsys Award Coupon Sync Default Filename. See the *Implementation Guide* for more information.

* **Suffix** - Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Suffix property setting. See the *Implementation Guide* for more information.

See Bulk Export to Batch in the "Promotions" chapter for details on the generated export files.

\- **Phone** - This Check Box determines whether the Customers in the Split/Target will be contacted by Phone.

\- **Channel Filter** - This Check Box determines whether the Customers in the Split/Target will be contacted through a Channel Filter.

If this Check Box has a checkmark (☑), Channel Filter options are displayed.

Figure 10-25: Channel Filter Options

Channel Filters have the following options:

* Radio Buttons that determine the type of Channel.

Location Channel - Customers are contacted by the Location.

Associate Channel - Customers are contacted by their Assigned Associates.

* **Filter** - This Check Box determines whether the export channel is filtered. If this Check Box has a checkmark (☑), additional Channel Filter options are displayed.

Figure 10-26: 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.

Method	Top - Numeric Attribute ▼
Attribute	(Please select) ▼

Figure 10-27: Numeric Attribute Filter

26. Click **next**.

   - If **Include Social Listening** was selected, the Social Listening step opens. Continue with .

   - If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with .

   - If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with .

27. Define the keywords used by the Social Listening process:
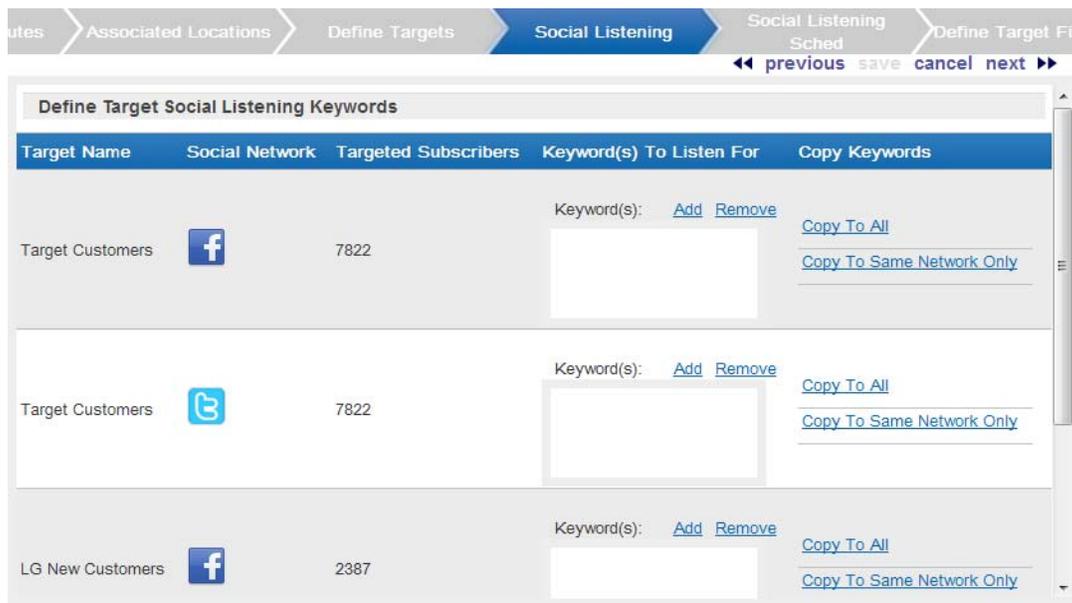
Figure 10-28: Social Listening Step

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:

Important: 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.

28. Click **next**.

The Social Listening Schedule step opens.

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

Figure 10-29: 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.

Tip: 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.

30. 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 .

31. Configure the Event Definition.

Event Description

Event Image
Update Image

Event Documents
There are no documents attached for this event.
Attach a document

Figure 10-30: 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** ([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. Only files with the file extensions of jpg, jpeg, png, pdf, doc, docx, xls, and xlsx can be uploaded.

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** ([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 10-31: Event Documents List

The document is removed from the List.

32. Click **next**.

The Budget step opens.

33. 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		
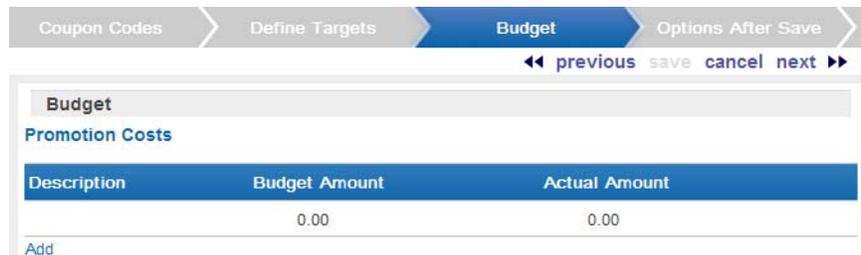
Figure 10-32: Budget Step for an Untargeted Promotion

Figure 10-33: Budget Step for a Targeted Promotion

1) Click the **Add** List.

A new Promotion Cost line is added to the List.

Figure 10-34: 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.

34. Click **next**.

The Generic Attributes step opens if there are any required or optional Promotion Attributes defined.

Figure 10-35: Generic Attributes Step

    a. Configure any required or optional promotion attributes.

        1) To add an Attribute, click the **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.

        4) To delete an Attribute, click the **Delete** button.

        5) To change the configuration value for an Attribute, select or enter the new configuration value.

35. Click **next**.

36. Click **next**.

The Options After Save step opens.

37. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

Figure 10-36: Options After Save Step

- **Generate** - Generate the Promotion Target data.

- **Approve** - Automatically approve the promotion.

- **Export** - Export the Promotion data to external systems, including POS or marketing 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** - Customer Engagement will only export the Customers added to the Promotion event by the Dynamic Promotions Job.

  * **Output All Updates** - Customer Engagement will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

38. Click **next**.

The Review step opens.

39. 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.

11

Create a Message Promotion

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 11-1: New Promotion Wizard

2. In the Promotion Type step in the New Promotion Wizard, select **Message**.

3. Click **next**.

    The General Information step opens.

4. Configure the General Information for the Promotion:

Figure 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.

> **Note:** This Check Box is only available if social media access has been enabled in **System Configuration**, and the User has been assigned the SystemAdmin and/or PromotionSocialListeningAdmin Role. See the *Implementation Guide* for more information about **System Configuration**, 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** - Customer Engagement 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.
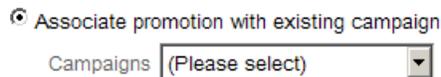
Figure 11-4: Campaigns Dropdown Menu

 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.

    Note: See the *Implementation Guide* for more information about Franchisee support.

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

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.

- For more information about Location Eligibility Rules, see Location Eligibility.

16. Click **next**.

The Define Targets step opens.

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

Figure 11-10: 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.

Figure 11-11: Targeting Type

* Otherwise, continue with step e.

Important: The Targeting Type Radio Buttons will only open if Dynamic Targeting is enabled, and you have been assigned either the `PromotionDynamicTargetAdmin` or `SystemAdmin` Role. See the *Implementation 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 the following step.

* **Dynamic Targeting** - After creating the Target, the list of Customers in the Target will be altered each time the Dynamic Promotions Job runs.

Important: The Dynamic Promotions Job should not be run on the same day after a Dynamic Promotion is generated. See Dynamic Promotions for more information.

Dynamic Targeting Option Radio Buttons open.

Figure 11-12: 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.

> **Note:** 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.

        *   For more information about Segment Eligibility Rules, see Segment/Target Eligibility.

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 .

19. Define the Target Filter for each Segment Target:

Figure 11-13: Define Target Filtering Step

    a. Select the **Filter Type** for each Segment:

        *   **None** - [DEFAULT] All Customers in the Segment are eligible.

        *   **Top Sales** - Customers from the Segment will be chosen for eligibility by the greatest total amount of purchases.

        *   **Random** - Customers from the Segment will be chosen randomly for eligibility.

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

Figure 11-14: 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.

Figure 11-15: 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%*	*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 11-16: 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 11-17: 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 <u>Radio Buttons</u> to select the type of Control Groups:

Figure 11-18: Control Groups Step

Important: 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 <u>step 25 on page 10</u>.

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

Figure 11-19: 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.

Figure 11-20: 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 11-21: Export Channels Step

- **Mail** - This Check Box determines whether the Customers in the Split/Target will be contacted by Mail.

- **E-Mail/Batch Exporter** - This Check Box determines whether the Customers in the Split/Target will be contacted by Email or through a separate system, with notification through a batch export.

If this Check Box has a checkmark (☑), batch exporter file names are displayed.

Please specify filenames for batch exporter files

Promotion Export filename
Prefix | yyyy-MM-dd_HHmmss ∨ | Static Name | -PromotionSync | Suffix | None ∨ |
Filename {yyyy-MM-dd_HHmmss}-PromotionSync

Targets Export filename
Prefix | yyyy-MM-dd_HHmmss ∨ | Static Name | -PromotionTargetsSync | Suffix | None ∨ |
Filename {yyyy-MM-dd_HHmmss}-PromotionTargetsSync

Figure 11-22: Batch Exporter Filenames Options

The following export filenames are configurable:

* **Promotion Export filename** - Contains information on the Promotion.

* **Targets Export filename** - Contains a listing of the Customers selected as Targets for the Promotion. Displayed only if Targets were selected for the Promotion.

For each filename, you can override the following defaults:

* **Prefix** - Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Prefix property setting. See the *Implementation Guide* for more information.

* **Static Name** - The identifying filename. Defaults from the related property: Responsys Promotion Sync Default Filename or Responsys Promotion Targets Sync Default Filename. See the *Implementation Guide* for more information.

* **Suffix** - Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HHmmss, yyyy-MM-dd_HHmmss, or none. Defaults from the Responsys Export Filename Default Suffix property setting. See the *Implementation Guide* for more information.

See Bulk Export to Batch in the "Promotions" chapter for details on the generated export files.

- **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.

Target Name	Mail	E-Mail / Batch Exporter	Phone	Channel Filter		
					Location Channel ◉	Filter ☐
					Associate Channel ○	
ZIP20500	☐	☐	☐	☑		

Figure 11-23: Channel Filter Options

Channel Filters have the following options:

* [Radio Buttons](#) that determine the type of Channel.

  Location Channel - Customers are contacted by the Location.

  Associate Channel - Customers are contacted by their Assigned Associates.

* **Filter** - This [Check Box](#) determines whether the export channel is filtered. If this [Check Box](#) has a checkmark (☑), additional Channel Filter options are displayed.

Figure 11-24: Filter Options

* **Max Count Per <Type>** - Determines the maximum number of target Customers that will be contacted through the channel. This field is only enabled if the **Filter** option was selected.

* **Method** - Method used to select the Customers contacted. This field is only enabled if the **Filter** option was selected. This [Selection Menu](#) has the following options:

  Random - [DEFAULT] Select Customers randomly.

  Top - Recent Purchase - Filter the Customers based on the most recent purchases.

  Top - LT Sales - Filter the Customers based on the largest amount purchased over the lifetime of their account.

  Top - Numeric Attribute - Filter the Customers based on the highest attribute value for a selected numeric attribute. If this option is selected, an additional Channel Filter option is displayed.

* **Attribute** - The numeric attribute used to determine the customers contacted. This field is only enabled if the **Filter** option was selected and the **Top - Numeric Attribute** was selected as the Method.

Figure 11-25: Numeric Attribute Filter

27. Click **next**.

    - If **Include Social Listening** was selected, the Social Listening step opens. Continue with .

    - If the **Channel Filter** Export Channel was selected (and **Include Social Listening** was not), the Event Definition step opens. Continue with .

    - If neither **Include Social Listening** nor the **Channel Filter** Export Channel were selected, the Budget step opens. Continue with .

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

Figure 11-26: 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:

Important: 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:

Figure 11-27: 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.

Tip: 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.

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 .

32. Configure the Event Definition.

Figure 11-28: 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. Only files with the file extensions of jpg, jpeg, png, pdf, doc, docx, xls, and xlsx can be uploaded.

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 11-29: 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 11-30: Budget Step for an Untargeted 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			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 11-31: 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	
			Delete
	0.00	0.00	

Add

Figure 11-32: 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 Generic Attributes step opens if there are any required or optional Promotion Attributes defined.

.

Figure 11-33: Generic Attributes Step

a. Configure any required or optional promotion attributes.

1) To add an Attribute, click the **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.

    4) To delete an Attribute, click the **Delete** button.

    5) To change the configuration value for an Attribute, select or enter the new configuration value.

36. Click **next**.

37. Click **next**.

The Options After Save step opens.

38. In each Check Box and/or set of Radio Buttons, indicate the steps that the Promotion creation process will perform when the Promotion is saved:

Figure 11-34: 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 or marketing 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** - Customer Engagement will only export the Customers added to the Promotion event by the Dynamic Promotions Job.

        * **Output All Updates** - Customer Engagement will export all Customers either added to or updated in the Promotion event by the Dynamic Promotions Job.

39. Click **next**.

The Review step opens.

40. 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.

12

Deals

Overview

In Customer Engagement, Deals are price incentives given to the customer. These Deals can often be reused in separate Promotions or Card Programs. To facilitate and ease the reuse of existing Deals, a library of Deals can be created in Customer Engagement.

About This Chapter

This chapter contains the following information:

- Deal Elements - Describes common elements of Deals.
- Deal List - Describes the Deal List page you use to work with Deals. Options include:
  - Actions Menu
  - Filters
  - Open a Deal
- Deal Window - Describes the information and options available in the Deal Window. Options include:
  - Actions Menu
  - Edit a Deal

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. Customer Engagement 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 Use

In Customer Engagement, Deals can be assigned an Intended Use. 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, including deals associated with Promotions or Card Programs.

- **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 12-1: Deal List

Table 12-1: *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 for more information.

Table 12-1: *Deal List Page Key (continued)*

Item	Description
②	**Filters** - Select criteria in the Filters to view a subset of the Deals in the Deal List. See Filters for more information.
③	**Page Navigation** - Page Navigation for the List.
④	**Deal List** - A List of Deals currently in the system. The List displays a limited number of Deals; use the Filter Menus to narrow down the List and locate a certain Deal.

The following information is displayed for each Deal:

- **Deal ID** - Unique ID for the Deal.
- **Deal Name** - Name of the Deal.
- **Deal Type** - The type of Deal. See Deal Types.
- **Intended Use** - Intended Use of the Deal. See Intended Use.

Actions Menu

The Actions Menu in the Deal List page includes the following options:

- **Create** - Create a new Deal. See Create a Deal.

Filters

The Deal List page includes the following Filter fields:
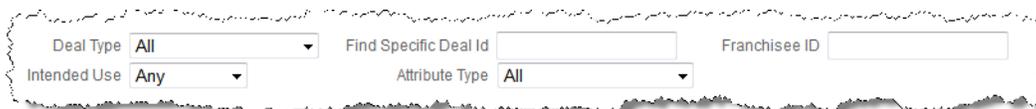
Figure 12-2: Filter Menus

- **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 for a list of the possible values.

- **Intended Use** - Filters the List by the Intended Use. See Intended Use 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.

Figure 12-3: Deal Window

The Deal Window includes the following information:

> **Note:** The information displayed in the Window will depend upon the configuration of the Deal. Not all of the elements described below will be displayed for all Deals.

- **General** - General information about the Deal. This includes the following information:

    - **Deal ID** - The unique ID for the Deal.

    - **Name** - The name of the Deal.

    - **POS Name** - The name of the Deal displayed on the POS system.

    - **Intended Promotion Type** - The type of use for the Deal. See Intended Use 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 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.

- **Deal Count Limit** - The maximum number of times the deal can be applied to the same transaction.

- **Comments** - Comments about the Deal.

- **Priority** - The priority given to the Deal, if more than one Deal can be applied to a Transaction.

- **Intended Industry** - The Intended Industry for 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.*

- **Maximum (To maximum of)** - The maximum quantity available for the discount.

- **Time Rules** - This <u>List</u> displays the <u>Time Eligibility</u> rules for the Deal. This <u>List</u> 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 <u>Actions Menu</u> for the Deal <u>Window</u> includes the following option:

- **Edit** - Edit the Deal.

Edit a Deal

To edit a Deal, click **Edit** in the <u>Actions Menu</u> in the <u>Deal Window</u>.

The Deal in opened in the Deal Creation <u>Wizard,</u> with all of the fields populated with the current Deal configurations.

- Use <u>Wizard Navigation</u> to move through the <u>Wizard</u> and make any necessary changes.

- Click **save** when you are finished making changes. The <u>Wizard</u> closes, saving the entered configurations and returning to the <u>Deal List</u>.

- Click **cancel** to exit the <u>Wizard</u> and return to the <u>Deal List</u> without saving the changes.

For more information about the fields and information to be entered, see <u>Create a Deal</u>.

Create a Deal

To create a Deal in Customer Engagement:

1. In the Deal List page, click **Create** in the Actions Menu.

    > **Tip:** If there are no Deals defined, Customer Engagement provides a **Click Here** Link for adding a Deal.

    The Create Deal Wizard opens to the Define Name step.

Figure 12-4: 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 the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration and this property.

- **Comments** - Additional comments about the Deal.

3. Click **next**.

   The Franchisees step opens.

4. Select the Franchisees to associate with the Deal.

Figure 12-5: 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.

Figure 12-6: 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 .

   - If the selected Deal Type is **Tiered Discount**, continue with .

8. Configure the Qualifying Items settings:

Figure 12-7: 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.

    Note: 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.

    Note: Customer Engagement will only display Items available to the Franchisee(s) selected in .

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 12.

    -   If the Deal Type is **Fixed Quantity/Price**, continue with step 14 on page 13.

- If the Deal Type is **Gift with Purchase**, continue with .

- If the Deal Type is **Buy X Get X**, continue with .

10. Define the awards for a Transaction Discount type:

Figure 12-8: 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. *Available only if the Intended Use for the Deal is not Entitlement.* 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, and only if the Intended Use for the Deal is not Entitlement.* 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 .

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

Figure 12-9: 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. *Available only if the Intended Use for the Deal is not Entitlement.* 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, and are available only if the Intended Use for the Deal is not Entitlement.* 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 .

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

Figure 12-10: 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. *Available only if the Intended Use for the Deal is not Entitlement.* 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 .

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

Figure 12-11: 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. *Available only if the Intended Use for the Deal is not Entitlement.* 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, and are available only if the Intended Use for the Deal is not Entitlement. 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.
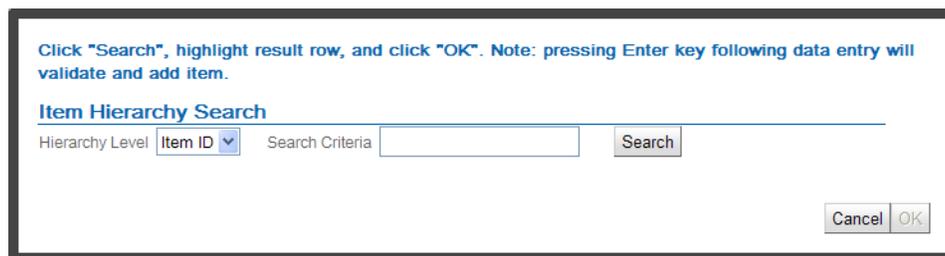
   Figure 12-12: Item Hierarchy Search Window

   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.

Figure 12-13: Gift Item Selected

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

17. Continue with .

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

Figure 12-14: 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. *Available only if the Intended Use for the Deal is not Entitlement.* 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, and only if the Intended Use for the Deal is not Entitlement.* 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 .

20. Configure the Qualifying Items settings:

Figure 12-15: 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, Customer Engagement 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.

* 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.

Note: If the imported Deal includes Items that are not associated with the Franchisees selected in step 4 on page 8, an error will be displayed, and each invalid Item will be tagged with a red exclamation point.

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.

Note: If multiple Deals are imported, the Item Eligibility Rules for each Deal are imported into a separate Set. For example, if three Deals are imported, three new Sets will be created.

Each Set has the following configurations:

Figure 12-16: 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 .

   - If the Deal Type is **Buy X Get Y**, continue with .

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

Figure 12-17: 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. *Available only if the Intended Use for the Deal is not Entitlement.* 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 <u>Radio Buttons</u> that determine how a discount is applied to the award Items. *These <u>Radio Buttons</u> are only enabled for* **Amount Off** *discount types, and only if the Intended Use for the Deal is not Entitlement.* These <u>Radio Buttons</u> 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 <u>step 29 on page 22</u>.

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

Figure 12-18: Buy X Get Y Award Definition

- **Priority** - If more than one Deal can be applied to a Transaction, this <u>Selection Menu</u> 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. *Available only if the Intended Use for the Deal is not Entitlement.* Set to **0** [DEFAULT] for no limit.

Figure 12-19: 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, and only if the Intended Use for the Deal is not Entitlement.* 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 22](#).

26. Configure the Qualifying Items for the Tiered Deal:

Figure 12-20: 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:

Figure 12-21: Tiered Discount Definition (Percent Off)

Figure 12-22: Tiered Discount Definition (Amount Off)

Figure 12-23: Tiered Discount Definition (Price Override)

> **Note:** 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, and only if the Intended Use for the Deal is not Entitlement.* 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 12-24: 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. *Available only if the Intended Use for the Deal is not Entitlement.*

   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 12-25: 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.
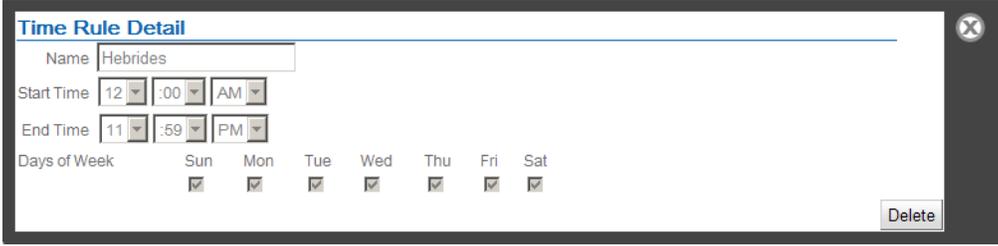
Figure 12-26: Time Rule Detail Window - Existing Rule

Note: 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.

13

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 - Describes the Card Definitions page and its associated Layer List. Options include:
  - Actions Menu
  - Open Card Definition

- Card Definition - Describes Card Definitions and the procedures for managing them. Options include:
  - Card Definition Basics
  - Programs Tab
  - Card Series Distribution Tab
  - Actions Menu
  - Edit Card Intended Use
  - Edit Card Definition Basics
  - Edit Card Type Attributes
  - Edit Card Vendor Data
  - View/Edit Franchisees

- Create New Card Definition - Provides the procedure for creating a new Card Definition.

- Card Series Distribution - Describes Card Series Distributions and the procedures for managing them. Options include:
  - Open a Card Series Distribution
  - Actions Menu
  - Create a Card Series Distribution
  - Generate Cards
  - Activate Cards

- [Edit Card Type Attributes](#)

- [Deactivate Cards](#)

- [Change Batch Expiration Date](#)

- [Rename Card Series Batches](#)

Programs

Programs are closely related to Card Definitions; you can access Programs through the Card Definitions interface. For information about Programs, see .

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.
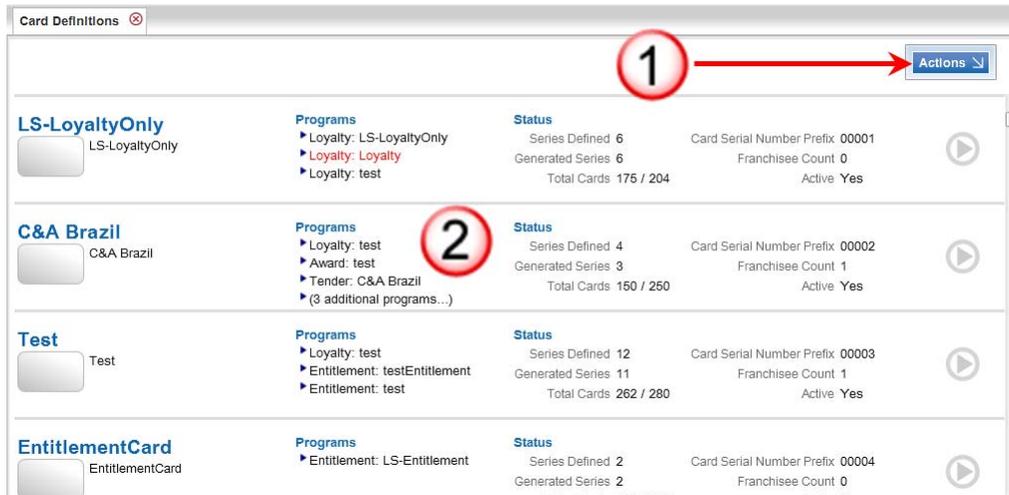
Figure 13-1: Card Definitions Page

Table 13-1: *Card Definitions List Page Key*

Item	Description
	Actions Menu - Click to open a menu of actions that can be performed in the Card Definitions Layer List page.
	Card Definitions Layer List - A Layer List of Card Definitions currently in the system. The following information is displayed for each Card Definition:

Figure 13-2: Card Definition in Layer List

- The name of the Card Definition.
- A description of the Card Definition.
- **Programs** - A list of Programs associated with the Card Definition. *Inactive Programs are displayed in red.* Each Program is listed in the format `[Program Type]:[Program Name]`.

Table 13-1: *Card Definitions List Page Key (continued)*

Item	Description
② (cont'd)	• **Status** - This area displays the following information about the Card Definition: The Status area displays the following information: • **Series Defined** - Number of Card Series Distribution(s) configured for the Card Definition. • **Generated Series** - Number of Card Series Distribution(s) generated for the Card Definition. • **Total Cards** - Total number of cards generated for the Card Definition. • **Card Serial Number Prefix** - Prefix used on Serial Numbers for Cards in the Card Definition. • **Franchisee Count** - Number of Franchisees associated with the Card Definition. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about Franchisees. • **Active** - Indicates whether the Card Definition is currently active.

Actions Menu

The Actions Menu for the Card Definitions page contains the following action:

• **Create New Card Definition** - Create a new Card Definition. See Create New Card Definition for a description of this procedure.

• **Refresh** - Refresh/Reload the Layer List of Card Definitions.
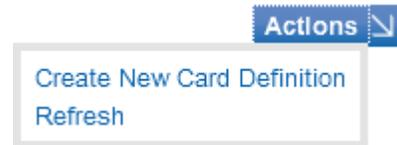
Open Card Definition

Click a Card Definition in the Card Definitions Layer List to open the Definition in a Card Definition page.

Card Definition

A Card Definition page displays information about a Card Definition in a [Layer List](#) that provides access to pages where information about the Card Definition can be viewed and updated. Card Definition pages can be accessed through the [Card Definitions Page](#).

Each Card Definition page displays the information described below.

Figure 13-3: Card Definition Page

Card Definition Basics

This area is displayed at all times for each Card Definition and contains the following information:

Figure 13-4: Card Definition Basics

- **Card Definition Name** - The name of the Card Definition.

- **Programs** - The Programs associated with the Card Definition. *Inactive Programs are displayed in red.*

- **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 Serial Number Prefix** - The Card Serial Number Prefix for this Card Definition.

  - **Card Prefix** - The Card Prefix, if any, 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](#).

Each Card Definition includes Tabs for the elements that constitute a Card Definition; the Programs Tab for Program information and the Card Series Distribution Tab for Card Series Distribution information.

Programs Tab

The Programs Tab is a Layer List containing a listing for each Program in the Card Definition.

Figure 13-5: Programs Tab

> **Note:** For more information about Programs, see page 1 in Chapter 14, "Programs".

The following information is listed for each program:

- Name of the Program.
- Description of the Program.
- **Type** - Program Type. Can be Tender, Award, or Loyalty.

> **Note:** For a Loyalty Program, if there are Items or Locations in the Program assigned to a different Franchisee than the Franchisee associated with the Program, a red background appears on the left side of the program row.

- **Active** - Indicates whether the Program is currently active.
- **Currency** - Currency code for the base currency used by the program.
- **Create Date** - Date on which the Program was created.
- **Effective Date** - Date on which the Program became effective.
- **Expiry Date** - Date on which the Program expires.
- **Allow Foreign Currency** - Indicates whether foreign currency transactions (i.e. transactions performed using a currency other than the base currency) can be applied to this Program.
- **Card Required** - Indicates whether the customer must present a Card during the transaction for the transaction to be applied to the Program.
- **Program ID** - ID of the program.

Card Series Distribution Tab

The Card Series Distribution tab is a [Layer List](#) containing a row for each Card Series Distribution in the Card Definition.

Figure 13-6: 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**).

> **Note:** 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 for more information.

- **Create a New Card Series** - Create a new
  Series for the Card Definition. See Create a
  Card Series Distribution for more information.

- **Franchisees** - View or edit the Franchisees
  associated with the Card Definition. See View/
  Edit Franchisees for more information.
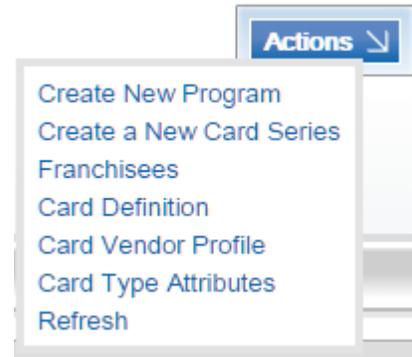
  > **Note:** This option is only present if Enable Franchise Support is set to
  > **Yes** in System Configuration. See the *Oracle Retail Customer Engagement
  > Cloud Services Implementation Guide* for more information.

- **Card Intended Use** - Determine the intended use for the Card Definition. See Edit
  Card Intended Use for more information.

  > **Note:** This option is only present if Enable Card Intended Use is set to
  > **Yes** in System Configuration. See the *Oracle Retail Customer Engagement
  > Cloud Services Implementation Guide* for more information.

- **Card Definition** - Edit the Card Definition Basics for the Card Definition. See Edit
  Card Definition Basics for more information.

- **Card Vendor Profile** - Edit the Vendor Data for the Card Definition. See Edit Card
  Vendor Data for more information.

- **Card Type Attributes** - Edit the Attributes for the Card Definition. See Edit Card
  Type Attributes for more information.

- **Refresh** - Refresh/Reload the Card Definition.

Edit Card Intended Use

> **Important:** 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 13-7: 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

> **Note:** 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 13-8: 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).

> **Tip:** As you enter Card Number Prefix and Card Number Length information, Customer Engagement displays the maximum number of cards that can be created for the card definition.
>
> The maximum number of cards that can be created is 1000000000000

- **Card Serial Number Prefix** - **The Card Serial Number Prefix is fixed and cannot be changed.**

- **Generate Pin** - A Check Box indicating whether Customer Engagement will generate PINs for the Cards.

  * **Checked** - Customer Engagement 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 Type Attributes

To edit the Attributes for a Card Type:

1. In a Card Definition page, click **Card Type Attributes** in the Actions Menu.

   The Card Type Attributes screen opens. All Card Type Attributes are displayed. If the Attribute has already been set for the Card Type, the **Delete** button is displayed for the Attribute; otherwise, the **Add** button is displayed.

Card Def: TEST ▸ **Card Type Attributes**

Cancel Save

Card Type Attributes

Required

Optional

| Character Card Type | test character card type | Add |
| Multi-Use Card? | Is the card type multi-use? | Add |

Figure 13-9: Card Type Attributes Screen

2. If necessary, add or change a required or optional card type attribute:

   a. To add an Attribute, click the **Add** button.

A configuration field opens.

   b. Select or enter the configuration value for the Attribute.

3. Repeat until all necessary Attribute(s) are configured.

4. To delete an Attribute, click the **Delete** button.

5. To change the configuration value for an Attribute, select or enter the new configuration value.

6. 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.

Card Def: 3-GC Pin Regrd W/out Card ▸ Vendor Profile

Cancel | Save

Define optional Card Vendor information.

Vendor Name
Vendor Address

Vendor City
Vendor State / Prov
Vendor Postal Code
Vendor Country
Vendor Phone

Figure 13-10: 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

> **Note:** See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about Franchisees and their configuration.

To view or edit the Franchisees associated with the Card Definition, click **Franchisees** in the Actions Menu on the Card Definition page.

The Franchisees screen opens.
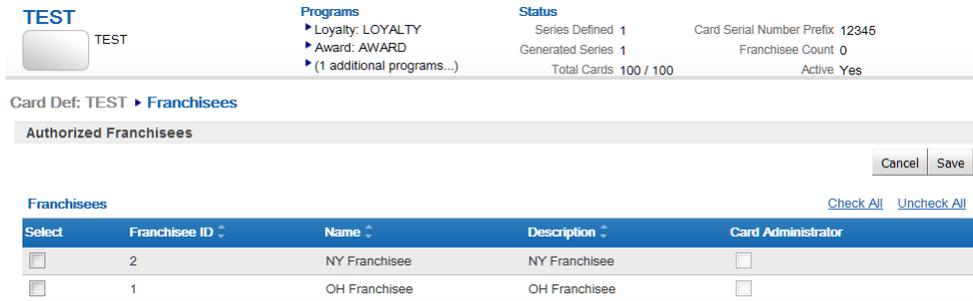
Figure 13-11: Franchisees Screen

Edit Franchisees

To modify the Franchisees associated with a Card Definition:

1. In the Franchisees List, use the **Select** Check Box for each Franchisee to determine whether the Franchisee will be associated with the Card Definition.

   - **Checked (☑)** - The Franchisee will be associated with the Card Definition.

   - **Unchecked (☐)** - The Franchisee will not be associated with the Card Definition.

   > **Tip:** Click the **Check All** Link to include all Franchisees in the Card Definition.

2. Use the Card Administrator Check Box for each Franchisee to determine whether the Franchisee will have Card Administrator privileges for the Card Definition.

   - **Checked (☑)** - The Franchisee will be a Card Administrator for the Card Definition.

   - **Unchecked (☐)** - The Franchisee will not be a Card Administrator for the Card Definition.

3. Click **Save** to save the new configuration and return to the Card Definition, or click **Cancel** to return to the Card Definition without saving the changes.

Create New Card Definition

Perform the following procedure to create a new Card Definition:

1. Click **Create New Card Definition** in the [Actions Menu](#) for the [Card Definitions Page](#).

    The Create Card Definition [Wizard](#) opens. Depending upon the configuration of the Enable Card Intended Use property in System Configuration, 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 the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration and the Enable Card Intended Use property.

2. In the Card Intended Use step, select the Intended Use for the Card.

Figure 13-12: Card Intended Use Step

3. Click **next**.

4. In the Card Profile step, enter the Card information:

Figure 13-13: Create Card Definition Wizard

-   **Card Type 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** - **[OPTIONAL]** The number of digits in the Card Number (including the Prefix).

Tip: As you enter Card Number Prefix and Card Number Length information, Customer Engagement 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**- **[REQUIRED]** Prefix used by the serial numbers for the Card Definition.

Important: 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 Customer Engagement will generate PINs for the Cards.

  * **Unchecked** - **[DEFAULT]** PINs will not be generated.

  * **Checked** - Customer Engagement will generate a PIN for each Card.

    When this option is checked, the **PIN Length** and **PIN Required** fields open.
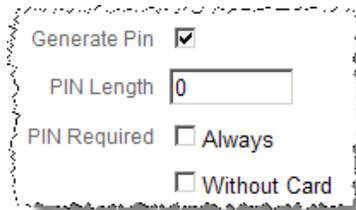
Generate Pin ☑

PIN Length 0

PIN Required ☐ Always

☐ Without Card

Figure 13-14: 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 13-15: 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 Type Attributes step opens.

Figure 13-16: Card Type 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.

c. Repeat until all necessary Attribute(s) are configured.

d. To remove an Attribute, click the **Delete** button for that Attribute.

The Attribute is deleted.

e. 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 8.

If Franchises are not enabled on your system, the Review step opens. Continue with step 10. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about Franchisees and their configuration.

8. Determine the Franchisees to associate with the Card Definition.

Figure 13-17: 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.

9. Click **next** when you have finished configuring the Franchisees.

The Review step opens.

10. 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.

11. Complete the Card Definition by performing the following procedures:

- *Create a New Program* on page 40 in Chapter 14, "Programs"
- Create a Card Series Distribution
- Edit Card Vendor Data

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.
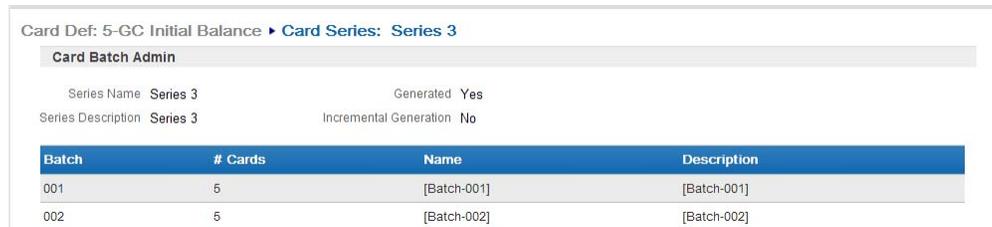
Card Def: 5-GC Initial Balance ▸ Card Series: Series 3

Card Batch Admin			
Series Name Series 3		Generated Yes	
Series Description Series 3		Incremental Generation No	

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

Figure 13-18: 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:

> **Note:** The options displayed will depend upon the current status of the Card Series Distribution. Generate Card Series and Edit Card Series are displayed only if a Card Series Distribution has not yet been generated. Activate Batches, Deactivate Batches, and Change Batch Expiry Date are displayed only if a Card Series Distribution has been generated.

- **Generate Card Series** - Generate Cards for the Batch (see Generate Cards for more information).

- **Rename Batches** - Changes the name of Card Batches (see Rename Card Series Batches).

- **Edit Card Series** - Edit the Series in the New Card Series Distribution Wizard (see Create a Card Series Distribution).

- **Edit Card Series Attributes** - Edit the Attributes for the Card Series (see Edit Card Series Attributes).

- **Activate Batches** - Activate Cards by Batch or by Card number range (see Activate Cards).

- **Deactivate Batches** - Deactivates Cards by Batch or by Card number range (see Deactivate Cards).

- **Change Batch Expiry Date** - Changes the expiration date for Cards by Batch or by Card number range (see Change Batch Expiration Date).
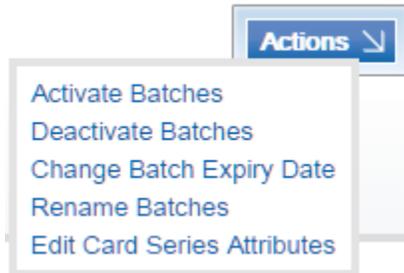
Create a Card Series Distribution

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**. This option is available only if the Program is Active.

Tip: If there are no Card Series Distributions defined for the Card Definition, Customer Engagement provides a **Click Here** Link for adding a Distribution.

The New Card Series Distribution Wizard opens with the Series Definition step.

Figure 13-19: 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.

     * **Variable** - The ending expiration date will be a certain, defined period of time after the initial activation date.

       If this option is selected, the Period Type and Number of Periods fields are displayed.

     * **None** - The beginning and ending expiration date will be defined by the Program.

   - **Start Date** - This Calendar Menu determines the first date on which the Cards will be active. *This field is only displayed if **Fixed** Expiration Dates are selected.*

   - **End Date** - This Calendar Menu determines the last date on which the Cards will be active. *This field is only displayed if **Fixed** Expiration Dates are selected.*

- **Period Type** - This Selection Menu determines the type of time period used to determine the expiration date of the Cards. *This field is only displayed if* ***Variable Expiration Dates** are selected.*

- **Number of Periods** - The number of time periods after the activation date that the Cards expire. *This field is only displayed if* ***Variable Expiration Dates** are selected.*

3. Click **next** to continue.

   The Card Series Attribute step opens if there are any card series attributes available for selection.

Figure 13-20: Card Series Attribute Step

a. To add an Attribute, 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.

   If an attribute is flagged as Required, you will need to select a value for that attribute.

d. To delete an Attribute, click the **Delete** button.

e. To change the configuration value for an Attribute, select or enter the new configuration value.

4. Click **next** to continue.

   If the Import Card Numbers Check Box was selected, the Import Card Numbers step opens.

Figure 13-21: Import Card Numbers Step

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

The Import Card Numbers window opens.
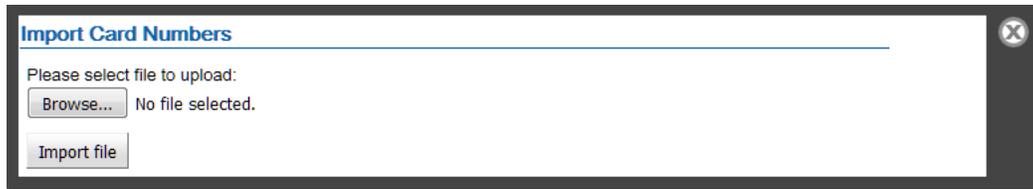
b. Use the <u>File Upload</u> (Browse) field to select the CSV file to import.

c. Click the **Import** button.

d. The Import CSV <u>Window</u> closes and the card numbers are listed on the screen.

File to import: CardsWithAttributes1.csv
Select file to import
Selected import file contains 6 lines.

Card Number	Serial Number	PIN	Tender Balance	Loyalty Balance	Award Balance	Attribute#1	Attribute#2	Attribute#3
1232267890123456	9999402001000001	123456	10.00	20.00	30.00	CARD_REDEMPTION_INFO = Re...	CARD_MIN_BALANCE = 10.00	CARD_LAST_USED = 201...
2345338901234567	9999402001000002	234567	10.01	20.01	30.01	CARD_REDEMPTION_INFO = Re...	CARD_MIN_BALANCE = 12.00	CARD_LAST_USED = 201...
3456449012345678	9999402001000003	345678	10.25	20.25	30.25	CARD_REDEMPTION_INFO = Re...	CARD_MIN_BALANCE = 12.00	CARD_LAST_USED = 201...

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]**

- ATTRIBUTE NAME 1 **[OPTIONAL]**

- ATTRIBUTE VALUE 1 **[OPTIONAL]**, but required if ATTRIBUTE NAME 1 specified

- ATTRIBUTE NAME 2 **[OPTIONAL]**

- ATTRIBUTE VALUE 2 **[OPTIONAL]**, but required if ATTRIBUTE NAME 2 specified

- ATTRIBUTE NAME 3 **[OPTIONAL]**

- ATTRIBUTE VALUE 3 **[OPTIONAL]**, but required if ATTRIBUTE NAME 3 specified

- ATTRIBUTE NAME 4 **[OPTIONAL]**

- ATTRIBUTE VALUE 4 **[OPTIONAL]**, but required if ATTRIBUTE NAME 4 specified

- ATTRIBUTE NAME 5 **[OPTIONAL]**

- ATTRIBUTE VALUE 5 **[OPTIONAL]**, but required if ATTRIBUTE NAME 5 specified

A placeholder must be used for all fields. For example, to include a card number of 1234567890123456 with a PIN of 123456, a Tender Balance Amount of 10, a Loyalty Balance Amount of 20, an Award Balance Amount of 30, and a

CARD_REDEMPTION_INFO attribute of "Redeemed Solon, OH", the following line would be included in the CSV file:

1234567890123456,123456,10,20,30,CARD_REDEMPTION_INFO,"Redeemed Solon, OH",,,,,,

Note the empty fields for the remaining four attribute names and values 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.

5. Click **next** to continue.

The Card/ Batches step opens.

Figure 13-22: Card / Batches Step

6. 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). You can create up to 999,999 Cards.

- **Number of Batches** - The number of separate Card batches included in the Card Series Distribution.

7. Click **next** to continue.

The Batch Labels step opens.

Figure 13-23: Batch Labels Step

8. If necessary, edit the following information for each batch in the Card Series Distribution:

 - **Name** - Name of the batch.

 - **Description** - Description of the batch.

 > **Note:** The Batch ID and Number of Cards (Batch and # Cards columns) cannot be edited. These are configured automatically by Customer Engagement and cannot be changed.

9. Click **next** to continue.

 The Review step opens.

10. 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](#)).

2. Click **Generate Card Series** in the [Actions Menu](#).

 A notification message is displaying, indicating that a Generate Cards Job has been submitted. See [page 1 in Chapter 19, "Process Queue"](#) for more information.

 ✅ Job successfully submitted. Please check the process queue.

You can generate cards only if all Programs for the Card Definition are currently active.

Activate Cards

To activate a set of Cards within a Card Definition:

1. Open the Card Series Distribution (see [Open a Card Series Distribution](#)).

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

An Activate Card Series Batches Window opens.

Figure 13-24: 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 13-25: 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.

Edit Card Series Attributes

To edit the Attributes for a Card Series:

1. Open the Card Series Distribution (see Open a Card Series Distribution).

2. Click **Edit Card Series Attributes** in the Actions Menu.

   The Card Series Attributes screen opens. All Card Series Attributes are displayed. If the Attribute has already been set for the Card Series and is not required, the **Delete** button is displayed for the Attribute; otherwise, the **Add** button is displayed.

Figure 13-26: Card Series Attributes Screen

3. If necessary, add or change a required or optional card type attribute:

   a. To add an Attribute, 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.

   d. To delete an Attribute, click the **Delete** button.

   e. To change the configuration value for an Attribute, select or enter the new configuration value.

   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.

Deactivate Cards

To deactivate a set of Cards within a Card Definition:

1. Open the Card Series Distribution (see Open a Card Series Distribution).

2. Click **Deactivate Batches** in the Actions Menu.
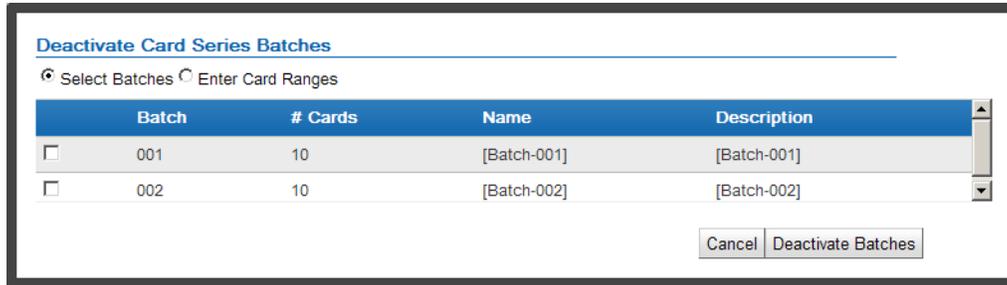
A Deactivate Card Series Batches <u>Window</u> opens.

Figure 13-27: Deactivate Card Series Batches Window

3. Select the method for deactivating Cards in the <u>Radio Buttons</u>:

- **Select Batches** - Deactivate Card series by batch.

If you select this option, a <u>List</u> of batches is displayed. Do the following:

* Put a check mark ([✓]) in the <u>Check Box</u> 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 <u>Text Field</u> is displayed for the beginning and one for the end of the Card range. Each <u>Text Field</u> is preceded by the Card Prefix. Do the following:
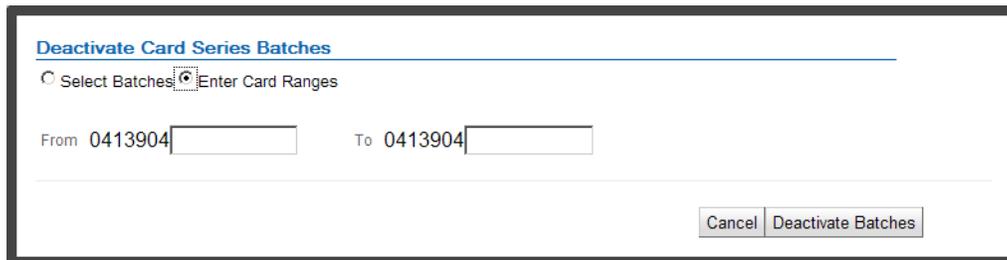
Figure 13-28: Deactivate Card Series Batches by Card Range

1) In the **From** <u>Text Field</u>, enter the first Card serial number (without the prefix) to be deactivated.

2) In the **To** <u>Text Field</u>, 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 <u>Open a Card Series Distribution</u>).

2. Click **Change Batch Expiry Date** in the <u>Actions Menu</u>.

A Change Batch Expiry Date Window opens.

Figure 13-29: 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 13-30: 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).

2. Click **Rename Batches** in the Actions Menu.

   A Rename Card Series Batches Window opens.

Rename Card Series Batches

⊙ Select Batches

	Batch	# Cards	Name	Description
☐	001	10	[Batch-001]	[Batch-001]
☐	002	10	[Batch-002]	[Batch-002]

Rename To [   ]   Description [   ]

Cancel | Rename Batches

Figure 13-31: 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.

14

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, and Award.

Program Types

Customer Engagement has the following types of Programs for Card Definitions:

- **Tender Program** - Tender Programs define rules for gift cards or stored value cards. See Tender Program.

- **Award Program** - Award Programs can define Entitlement Deals offering percentage or dollar discounts, or 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.

- **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 or Entitlement coupon associated with an Award Program. See Loyalty Program.

About this Chapter

This chapter includes the following information:

- Open a Program - Describes how to open an existing Program.

- Tender Program - Describes working with Tender Programs for gift cards or stored value cards. Options include:

  - Actions Menu

  - Edit a Tender Program

- Award Program - Describes working with Award Programs for Entitlement Deals or E-Awards. Options include:

  - Actions Menu

  - Edit an Award Program

  - Entitlement Deal

  - Add an Entitlement Deal

- [Loyalty Program](#) - Describes working with Loyalty Programs for tracking customer transactions and earned points. Options include:

    - [Actions Menu](#)

    - [Edit a Loyalty Program](#)

    - [Loyalty Level](#)

    - [Issue Rule](#)

    - [Award Rule](#)

    - [Movement Rule](#)

- [Create New Program](#) - Describes how to create a new program. Options include:

    - [Create a Tender Program](#)

    - [Create a Loyalty Program](#)

    - [Create an Award Program](#)

Open a Program

To open a Program within a <u>Card Definition</u>, open the <u>Programs Tab</u> in a <u>Card Definition</u> page. The Program will be opened in the Program screen.

> **Note:** For more information about opening a <u>Card Definition</u> to access a Program, see <u>page 1 in Chapter 13, "Card Definitions"</u> and the section <u>Programs Tab</u>.

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:

- <u>Tender Program</u>
- <u>Award Program</u>
- <u>Loyalty Program</u>

Tender Program

The following information is displayed for Tender Programs:

Figure 14-1: 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 credits to the card balance can be reversed.

  - **Debit Reversal** - Indicates whether debits from the card balance can be reversed.

  - **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.

> **Note:** The Edit Program button will be available only 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 and Create a Tender Program.

Award Program

The following information is displayed for Award Programs:

Card Def: EZKCard ▶ Award Program: sample program

Program Name sample program	Card required Yes	Initial Account Balance 10.00	Account Level Expiration No	Awards Will Be Expired None
Program Description sample program	Card Merge Permitted Yes	Allow Reloads Yes	Period Type -	Award Expiration Period Type -
Start Date 2015-11-17	Allow Foreign Currency Yes	Active Yes	Number of Periods -	Number of Periods -
End Date 2020-11-17	Currency United States of America, Dollars			

Entitlement Deals

BOGO Clothing
BOGO Clothing
Deal ID 503   Unlimited Redemption Yes   Create Date 2016-01-13   Issue automatically when first activated? No
Priority 1   Issue only when first associated to a customer? No
Active Yes   ⏵

Buy one get one
Buy one get one
Deal ID 504   Unlimited Redemption Yes   Create Date 2015-11-17   Issue automatically when first activated? Yes
Priority 1   Start Date 2015-11-17   Issue only when first associated to a customer? No
Active No   End Date 2015-11-17   ⏵

25% off one item at registration
25% off one item at registration
Deal ID 530   Unlimited Redemption No   Create Date 2015-11-17   Issue automatically when first activated? Yes
Priority 1   Maximum Redeemable Count 1   Validity Periods 1   Issue only when first associated to a customer? No
Active Yes   Period Type Years   ⏵

Figure 14-2: Award Program Screen

- General information about the Award 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.

  - **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.

  - **Initial Account Balance** - Indicates whether there is an initial balance on each account.

  - **Allow Reloads** - Indicates whether the Program allows accounts to be reloaded.

  - **Active** - Indicates whether the Program is currently active.

  - **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.

  - **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** - Awards will expire based on a fixed date. If the award hasn't been redeem before that date it is considered expired.

* **Rolling X** - The expiration date is defined when the coupon is first created, but as activity is performed on the award account the expiration date is recalculated (rolled ahead) based on the current date (activity). The purpose of this type is, if the customer is still shopping with you, but hasn't got around to using their coupon, the expiration date is extended as a courtesy.

- **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.

• **Entitlement Deals:** Lists each Entitlement Deal currently associated with the Award Program:

- The name of the Entitlement Deal.

- **Deal ID** - The unique ID for the Entitlement Deal.

- **Priority** - The priority given to the Entitlement Deal, if more than one Deal can be applied to a Transaction.

- **Active** - Indicates whether the Entitlement Deal is currently active for the Award Program.

- **Unlimited Redemption** - Indicates whether there is a limit on the number of times the Entitlement Coupon can be redeemed.

- **Maximum Redeemable Count** - Maximum number of times the Entitlement Coupon can be redeemed by the Customer. This setting is used only if Unlimited Redemption is set to No.

- **Create Date** - The date when the Entitlement Deal was added to the Award Program.

- **Start Date** - The date when the Entitlement Deal becomes effective. Displayed only if an Award Validity Period has been set up for the Deal in the Award Program, with the Fixed radio button selected.

- **End Date** - The last date when the Entitlement Deal is effective. Displayed only if an Award Validity Period has been set up for the Deal in the Award Program, with the Fixed radio button selected.

- **Validity Periods** - The number of periods when the Entitlement Deal is effective. Displayed only if an Award Validity Period has been set up for the Deal in the Award Program, with the Relative radio button selected.

- **Period Type** - The type of period to determine when the Entitlement Deal is effective. Possible periods are Days, Weeks, Months, and Years. Displayed only if an Award Validity Period has been set up for the Deal in the Award Program, with the Relative radio button selected.

- **Issue automatically when first activated?** - Indicates whether to issue the Entitlement Coupon when the account is first activated.

- **Issue only when first associated to a customer?** - Indicates whether to issue the Entitlement Coupon when the Card is first associated with the Customer. Only the first Customer associated with the Card receives the Entitlement Coupon.

Award programs do not require an Entitlement deal. EAwards are still issued and redeemed based on the award program rules. When you add an entitlement deal you can also issue Entitlement coupons (award).

Actions Menu

The Actions Menu for an Award Program contains the following options:

- **New Entitlement Deal** - Add a new Entitlement Deal to the Program. See Add an Entitlement Deal.

- **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.

   > **Note:** 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 and Create an Award Program.

Entitlement Deal

Entitlement Deal entries for an Award Program define the Certificate Details, Time Eligibility rules, and Location Eligibility rules for the Deal.

Open an Entitlement Deal

An Entitlement Deal is opened by clicking on the Deal in the Entitlement Deal Layer List for the Award Program.

The screen displays a set of Tabs containing information about the Entitlement Deal for the Award Program: Certificate Details Tab, Time Eligibility Tab, and Location Eligibility Tab.

Figure 14-3: Entitlement Deal Definition window

Certificate Details Tab

The Certificate Details tab displays basic information about the Entitlement Deal for the Award Program. The following information can be viewed and edited:

Entitlement Deal Definition - This area contains the fields that define the basic parameters of the Deal for the Award Program.

- **Associated Deal Id** - The unique ID for the Entitlement Deal. If the Award Program is currently Active, the Select Deal Link opens a window where you can select a different Entitlement Deal to associate with the Award Program.

- **Associated Deal Name** - A Link displaying the name of the currently associated Entitlement Deal, and opens the Deal Window if clicked.

- **Priority** - Number indicating the order in which the Deal is offered.

- **Name** - Name of the Entitlement Deal. Entering a different name changes the name displayed within the Award Program, but not the Entitlement Deal itself.

- **Description** - Description of the Entitlement Deal. Entering a different description changes the description displayed within the Award Program, but not the Entitlement Deal itself.

- **Active** - Indicates whether the Entitlement Deal is currently active for the Award Program.

- **Issue automatically when first activated?** - Indicates whether to issue the Entitlement Coupon when the account is first activated.

- **Issue only when first associated to a customer?** - Indicates whether to issue the Entitlement Coupon when the Card is first associated with the Customer. Only the first Customer associated with the Card receives the Entitlement Coupon.

Award Validity Period - This area contains the fields that define the period when the Entitlement Deal is valid.

- **Fixed** - The Entitlement Deal is valid for the Award Program between specified dates. After selecting this option, configure the following fields:

    - **Start Date** - The date on which the Entitlement Deal is first valid.

    - **End Date** - The last date on which the Entitlement Deal is valid.

- **Relative** - The Entitlement Deal 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 Entitlement Deal is valid. The type of period is determined by the Period Type configuration.

    - **Period Type** - Units of time used to determine the validity period.

Redemption Rules - This area contains the fields that define the how many times the Entitlement Deal Coupon can be redeemed through the Award Program.

- **Unlimited Redemption** - Indicates whether there is a limit on the number of times the Entitlement Deal Coupon can be redeemed.

- **Maximum Redeemable Count** - Maximum number of times the Entitlement Deal Coupon can be redeemed by the Customer. This setting is used only if Unlimited Redemption is set to No.

Time Eligibility Tab

The Time Eligibility tab displays a List of rules that determine the times at which the Entitlement Deal is effective.

Figure 14-4: Time Eligibility Tab

> **Tip:** If there are no Time Eligibility rules defined for the Entitlement Deal, Customer Engagement provides a **Click Here** Link for adding one.

- For more information about Time Eligibility Rules, see *Time Eligibility* in page 39 in Chapter 1, "Introduction".

- For instruction on configuring Time Eligibility Rules, see *Define Time Eligibility* in page 40 in Chapter 1, "Introduction".

Location Eligibility Tab

The Location Eligibility tab displays a <u>List</u> of Locations and/or Attributes for Locations that are eligible and/or excluded from the Entitlement Deal through the Award Program.

Figure 14-5: Location Eligibility Tab

Tip: If there are no Location Eligibility rules defined for the Entitlement Deal, Customer Engagement provides a **Click Here** <u>Link</u> for adding an Included Location and a **Click Here** <u>Link</u> for adding an Excluded Location.

- For more information about Location Eligibility Rules, see *Location Eligibility* in <u>page 24 in Chapter 1, "Introduction"</u>.

- For instructions on configuring Location Eligibility Rules, see *Define Location Eligibility* in <u>page 25 in Chapter 1, "Introduction"</u>.

Add an Entitlement Deal

To create an Entitlement Deal in an Award Program:

1. Select **New Entitlement Deal** in the <u>Actions Menu</u> for an <u>Award Program</u>.

Tip: If there are no Entitlement Deals defined for the <u>Award Program</u>, Customer Engagement provides a **Click Here** *<u>Link</u>* for adding an Entitlement Deal.

A blank Entitlement Deal definition window opens.

Figure 14-6: Blank Entitlement Deal definition window

2. Enter the information for the Entitlement Deal. See Entitlement Deal for more information.

3. Click **Save** to save the information and create the Entitlement Deal in the Award 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* in .

   - For instruction on configuring Time Eligibility Rules, see *Define Time Eligibility* in .

   - For information about Location Eligibility Rules, see *Location Eligibility* in .

   - For instructions on configuring Location Eligibility Rules, see *Define Location Eligibility* in .

Loyalty Program

The following information is displayed for Loyalty Programs:

Figure 14-7: 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** - Informational and reporting use only.

- **Points Decimal Precision** - The number of decimal points used in tracking points.

- **Currency** - The base currency for the Program.

- **Loyalty Levels** - A <u>Layer List</u> displaying information for each Level in the Program.

  > **Note:** If there are Items or Locations assigned to the Loyalty Level that are associated with a different Franchisee than the Loyalty Program, a red background appears on the left side of the row.
  >
  >

To open a Loyalty Level, click the Loyalty Level in the <u>Layer List</u>.

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 (available only for active Programs).

- **Activate Program** - Activate the Program (available only for inactive Programs).
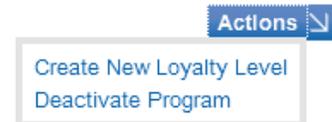
Edit a Loyalty Program

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.

> **Note:** The Edit Program button will be available only 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 and Create a Loyalty Program.

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 <u>Tabs</u> containing information about the Loyalty Level: <u>Level Parameters Tab</u>, <u>Issue Rules Tab</u>, <u>Award Rules Tab</u>, and <u>Movement Rules Tab</u>.

Figure 14-8: Loyalty Level Screen

Actions Menu

The <u>Actions Menu</u> for each Loyalty Level has the following options:

- **Create New Issue Rule** - Creates a new Issue Rule. See <u>Add Issue Rule</u> for more information.

- **Create New Award Rule** - Creates a new Award Rule. See <u>Add Award Rule</u> for more information.

- **Create New Movement Rule** - Creates a New Movement Rule. See <u>Add Movement Rule</u> for more information.

Level Parameters Tab

The Level Parameters tab allows users to view and edit the basic parameters of the Loyalty Level.

Figure 14-9: 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 <u>Check Box</u> indicating/determining whether the Level is the Level to which each Customer is assigned upon joining the <u>Loyalty Program</u>.

- **Negative Balance** - A <u>Check Box</u> indicating/determining whether the Loyalty Level allows Customers to have negative point balances.

- **Active** - A <u>Check Box</u> indicating/determining whether the level is currently active.

- **Points Aging** - Rules determining how and whether Loyalty points age.

  - **Points Aging** - The method used for aging the points. This <u>Selection Menu</u> 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 (active only 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 (active only 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 (active only if Escrow Points is **Checked**).

  - **Escrow Periods** - Determines the number of periods (selected in Period Type) that will pass before points are made available (active only 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 <u>Loyalty Program</u>.

To discard changes and return to the <u>Loyalty Program</u>, 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 14-10: Issue Rules Tab

> **Note:** If there are Items or Locations associated with the Issue Rule that are assigned to a different Franchisee than the Program, a red background appears on the left side of the Issue Rule row.
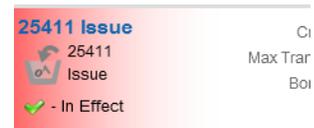
The following information is displayed for each Issue Rule:

- 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 marketing engagements** - The number of times the customer interacts with marketing media, such as watching a video online.

  - **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**).

- **Frequency Period** - This field determines the time period used to control the frequency with which a Customer can earn points through marketing engagements. Can be set to One-time only, Daily, Weekly, Monthly, or Yearly. Shown if the Calculation Type is **The number of marketing engagements**.

- **Issues Per Period** - The number of times a Customer can earn points through marketing engagements during the **Frequency Period**. Set to 1 if the **Frequency Period** is One-time only. Shown if the Calculation Type is **The number of marketing engagements**.

- **Unlimited Issuance** - Determines whether points can be issued an unlimited number of times during the **Frequency Period**. Shown if the Calculation Type is **The number of marketing engagements**.

- **Rule Count Limit** - The total number of times a Customer can earn points through marketing engagements. Shown if the Calculation Type is **The number of marketing engagements**.

- **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 e-award, entitlement, or coupon awards are issued by the Loyalty Level.

Figure 14-11: 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. Set to Fixed for an Entitlement Coupon or a Coupon.

- **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. Included if the Points Cost Type is Fixed.

- **Award Factor** - The multiplier used to convert points for an E-Award when the Points Cost Type is Cashback.

- **Minimum Award** - Minimum amount of the award when Points Cost Type is Cashback.

- **Award Amount** - The amount of the Award. Applicable only when Points Cost Type is Fixed.

- **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.

Figure 14-12: 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.

- **Movement Periods** - The number of periods (from Test Period Type) used for the movement test. Used only if the Test Type is either Average Points Earned Per Month or Time Period Since Last Level Move.

- **Test Period Type** - The time period used to determine eligibility for the move.

See [Movement Rule](#) for more information on the information displayed for Promotion, Demotion, or Sustain Movement Rules.

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.
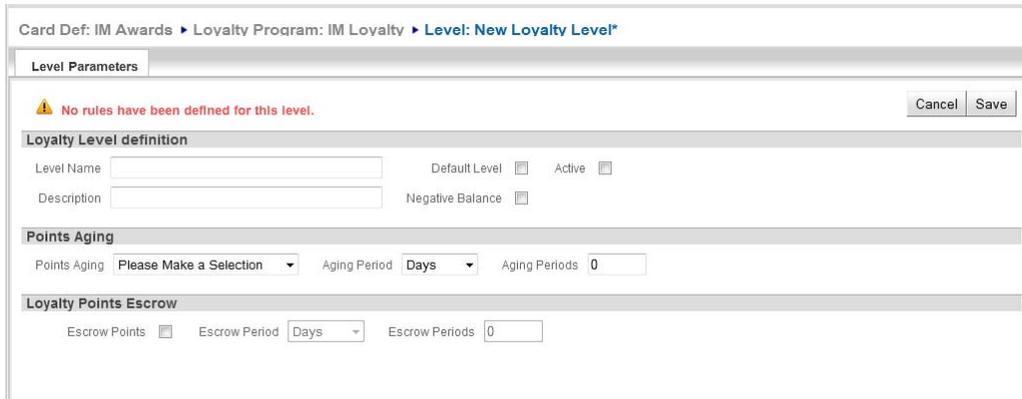
Figure 14-13: Loyalty Level Configuration

2. Make changes to the Level Parameter information. See Level Parameters Tab 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.
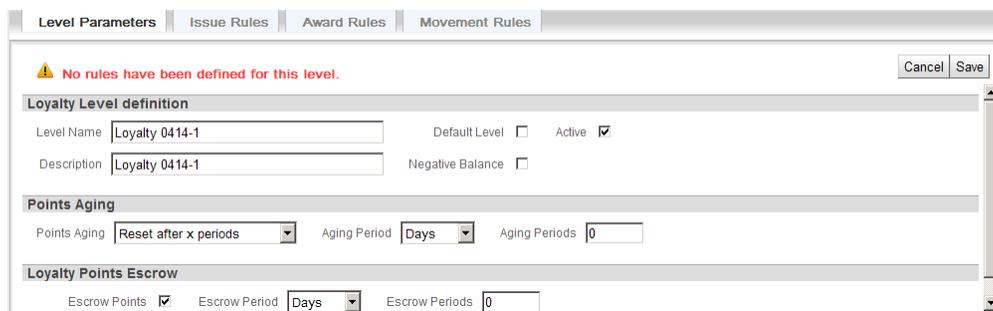
Figure 14-14: Loyalty Level - No Rules Defined

5. Create the Rules for the Loyalty Level. See the following procedures for instructions:

    -   Add Issue Rule

    -   Add Award Rule

    -   Add Movement Rule

    -   Add Time Eligibility Rule

- [Add Item Eligibility Rule (Simple)](#)

- [Add Location Eligibility Rule](#)

- [Add Segment Eligibility Rule](#)

- [Define Tender Eligibility](#)

6. Click the **Save** button to save the new configuration and return to the Loyalty Level, or click the **Cancel** button to discard the changes and return to the Loyalty Level.

Issue Rule

Issue Rules determine how points are earned within a Loyalty Level.

An Issue Rule is opened by clicking on the Issue Rule in the [Issue Rules Tab](#).

Figure 14-15: 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](#) 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:

  - **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 (always selected if the Calculation Type is **The number of marketing engagements**).

    - * **Unchecked** - The Issue Rule stipulates that the [Loyalty Program](#) does not issue points as Bonus Points.

  - **Fixed Amount** - The Fixed Amount of points earned by each transaction or marketing engagement.

  - **Points Multiplier** - The number multiplied by the value indicated in the Calculation Type field (shown only if the Calculation Type is **The value of each item purchased** or **The quantity of each item purchased**).

  - **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 marketing engagements** - The number of times the customer interacts with marketing media, such as watching a video online.

    - * **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.

  - **Max Trans Per Day** - The maximum number of transactions per day for which points will be issued by the [Loyalty Program](#)(not shown if the Calculation Type is **The number of marketing engagements**).

  - **Transaction Min Value** - Minimum amount of a transaction for it to be applied to a Loyalty account (not shown if the Calculation Type is **The number of marketing engagements**).

  - **Include Non-Physical Charges** - Determines whether points will be issued for non-physical items in a transaction (not selected if the Calculation Type is **The number of marketing engagements**).

  - **Issuance Rules -** Includes additional settings displayed only if the Calculation Type is **The number of marketing engagements**.

    - * **Frequency Period** - This field determines the time period used to control the frequency with which a Customer can earn points through marketing engagements. Possible settings are One-time only, Daily, Weekly, Monthly, or Yearly.

    - * **Issues Per Period** - The number of times a Customer can earn points through marketing engagements during the **Frequency Period**. Set to 1 if the **Frequency Period** is One-time only.

* **Unlimited Issuance** - Determines whether points can be issued an unlimited number of times during the **Frequency Period**. Unselected if the **Frequency Period** is set to One-time only.

* **Rule Count Limit** - The total number of times a Customer can earn points through marketing engagements. Set to 1 if the **Frequency Period** is One-time only.

- **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. Not available if the Calculation Type is **The number of marketing engagements.**

Figure 14-16: Time Eligibility Tab

Tip: If there are no Time Eligibility rules defined for the Issue Rule, Customer Engagement provides a **Click Here** [Link](#) for adding one.

- For more information about Time Eligibility Rules, see [Time Eligibility](#).

- For instruction on configuring Time Eligibility Rules, see [Define Time Eligibility](#).

Item Eligibility Tab

The Item Eligibility tab displays a <u>List</u> of Items and or Attributes for Items that are eligible and/or excluded from the Issue Rule. Not available if the Calculation Type is **The number of marketing engagements.**

Card Def: ALWCard-3 ▸ Loyalty Program: Loyalty 0414-2 ▸ Level: Loyalty 0414-2 ▸ Issue Rule: Loyalty 0414-2

Cancel Save

| Issue Rule Parameters | Time Eligibility | Item Eligibility | Location Eligibility | Tender Eligibility | Segment Eligibility |

Item Rule definition.

Included Items   Add

Filter	Value	Description
Department	600	Home Furnishings
Department	500	Womens Shoes

Excluded Items   Add

Filter	Value	Description
Item Id	230001	SHOE TAN 10.5E
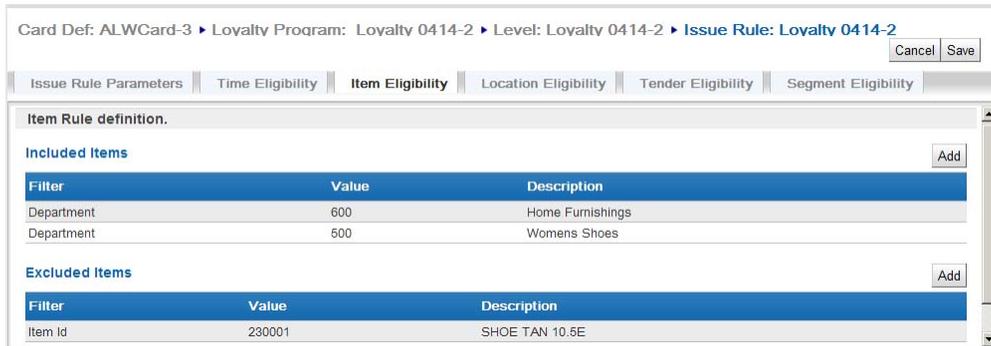
Figure 14-17: Item Eligibility Tab

Tip: If there are no Item Eligibility rules defined for the Issue Rule, Customer Engagement provides a **Click Here** <u>Link</u> for adding an Included Item and a **Click Here** <u>Link</u> for adding an Excluded Item.

- For more information about Item Eligibility Rules, see <u>Item Eligibility</u>.
- For instructions on configuring Item Eligibility Rules, see <u>Define Item Eligibility</u>.

Location Eligibility Tab

The Location Eligibility tab displays a <u>List</u> of Locations and/or Attributes for Locations that are eligible and/or excluded from the Issue Rule.

Card Def: ALWCard-3 ▸ Loyalty Program: Loyalty 0414-2 ▸ Level: Loyalty 0414-2 ▸ Issue Rule: Loyalty 0414-2

Cancel Save

| Issue Rule Parameters | Time Eligibility | Item Eligibility | Location Eligibility | Tender Eligibility | Segment Eligibility |

Location Rule definition.

Included Locations   Add Group(s)

Location Attribute	Value
STORE_ID	0285
Add Location to Group	
Or	

Location Attribute	Value
Country	US
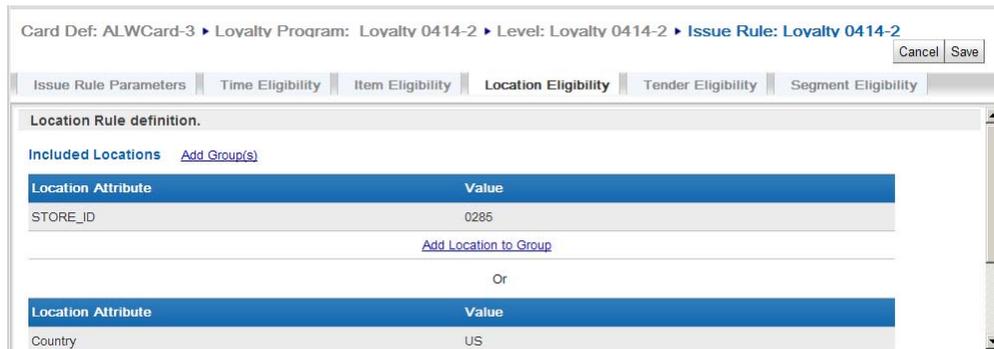
Figure 14-18: Location Eligibility Tab

Tip: If there are no Location Eligibility rules defined for the Issue Rule, Customer Engagement provides a **Click Here** <u>Link</u> for adding an Included Location and a **Click Here** <u>Link</u> for adding an Excluded Location.

- For more information about Location Eligibility Rules, see <u>Location Eligibility</u>.
- For instructions on configuring Location Eligibility Rules, see <u>Define Location Eligibility</u>.

Tender Eligibility Tab

The Tender Eligibility tab displays a [List](#) of tenders that can be made eligible or ineligible for the Issue Rule. Not available if the Calculation Type is **The number of marketing engagements.**

Figure 14-19: Tender Eligibility Tab

- For more information about Tender Eligibility Rules, see [Tender Eligibility](#).

- For instruction on configuring Tender Eligibility Rules, see [Define Tender Eligibility](#).

Segment Eligibility Tab

The Segment Eligibility tab displays a [List](#) of Segments and/or Segment Strata that are eligible for the Issue Rule. If no Segments are listed, all Segments and Strata are eligible for the Issue Rule.

Figure 14-20: Segment Eligibility Tab

> **Tip:** If there are no Segment Eligibility rules defined for the Issue Rule, Customer Engagement provides a **Click Here** [Link](#) for adding one.

- For more information about Segment Eligibility Rules, see [Segment/Target Eligibility](#).

- For instructions on configuring Segment Eligibility Rules, see [Define Segment Eligibility](#).

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 <u>Wizard</u> opens with the Issue Rule Definition step.

Figure 14-21: 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 <u>Check Box</u> 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.
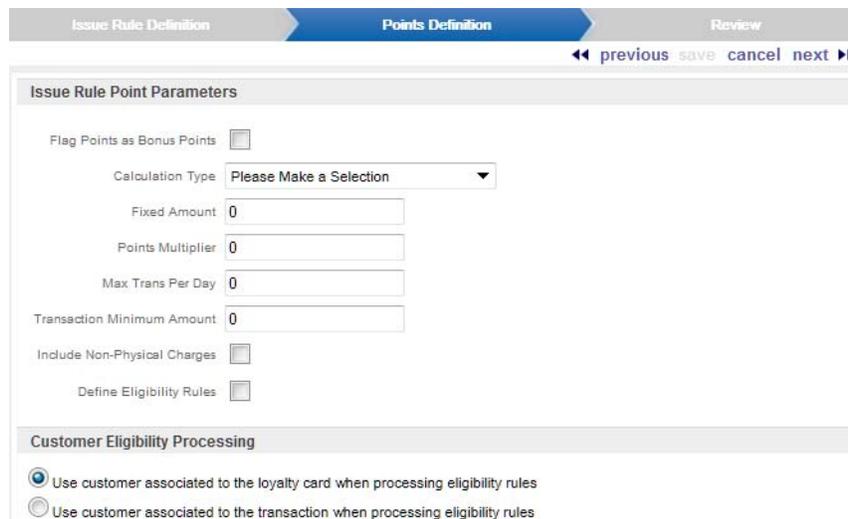
Figure 14-22: Points Definition Step

4. In the Points Definition step, define the points used by the <u>Loyalty Program</u>:

   - **Flag Points as Bonus Points** - This <u>Check Box</u> determines whether the <u>Loyalty Program</u> issues points as bonus points.

- * **Checked** - Points are issued as bonus points (selected and display-only if the Calculation Type is **The number of marketing engagements**).

- * **Unchecked** - Points are not issued as bonus points.

- **Calculation Type** - This field determines the method used to calculate points. This <u>Selection Menu</u> 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 marketing engagements** - The number of times the customer interacts with marketing media, such as watching a video online.

  - * **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 or marketing engagement. Can be overridden.

- **Points Multiplier** - The number multiplied by the value indicated in the Calculation Type field (shown only 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 <u>Loyalty Program</u> (not shown if the Calculation Type is **The number of marketing engagements**).

- **Transaction Minimum Amount** - Minimum amount of a transaction for it to be applied to a Loyalty account (not shown if the Calculation Type is **The number of marketing engagements**).

- **Include Non-Physical Charges** - This <u>Check Box</u> determines whether points will be issued for non-physical items in a transaction (unselected and display-only if the Calculation Type is **The number of marketing engagements**).

- **Define Eligibility Rules** - This <u>Check Box</u> indicates whether to configure Eligibility Rules for the Issue Rule.

  - * **Checked** - Eligibility Rules will be defined for the Issue Rule (selected and display-only if the Calculation Type is **The number of marketing engagements**). 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.

- **Issuance Rules -** Includes additional settings displayed only if the Calculation Type is **The number of marketing engagements**.

  - * **Frequency Period** - This field determines the time period used to control the frequency with which a Customer can earn points through marketing engagements. This <u>Selection Menu</u> can be set to One-time only, Daily, Weekly, Monthly, or Yearly. Required.

  - * **Issues Per Period** - The number of times a Customer can earn points through marketing engagements during the **Frequency Period**. Defaults to 1 if the **Frequency Period** is One-time only, and cannot be changed.

* **Unlimited Issuance** - This Check Box determines whether points can be issued an unlimited number of times during the **Frequency Period**. Unselected and display-only if the **Frequency Period** is set to One-time only. Otherwise, required.

* **Rule Count Limit** - The total number of times a Customer can earn points through marketing engagements. Defaults to 1 if the **Frequency Period** is One-time only, and cannot be changed.

- **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 (not shown if the Calculation Type is **The number of marketing engagements**).

  * **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.

5. Click **next** to continue.

   The Time Eligibility step opens if the Define Eligibility Rules Check Box was selected at the Points Definition step.
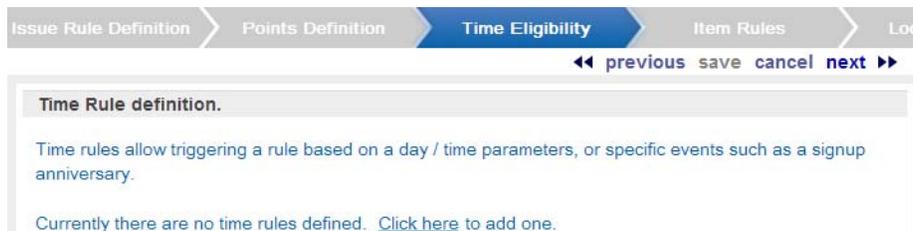
Figure 14-23: Time Eligibility Step

6. Define the Time Eligibility Rules for the Issue Rule.

   - For instructions on configuring Time Eligibility Rules, see Define Time Eligibility.

   - For more information about Time Eligibility Rules, see Time Eligibility.

7. Click **next** to continue.

   The Item Rules step opens if the Define Eligibility Rules Check Box was selected at the Points Definition step. This step does not open if the Calculation Type selected at the Points Definition step is **The number of marketing engagements**.
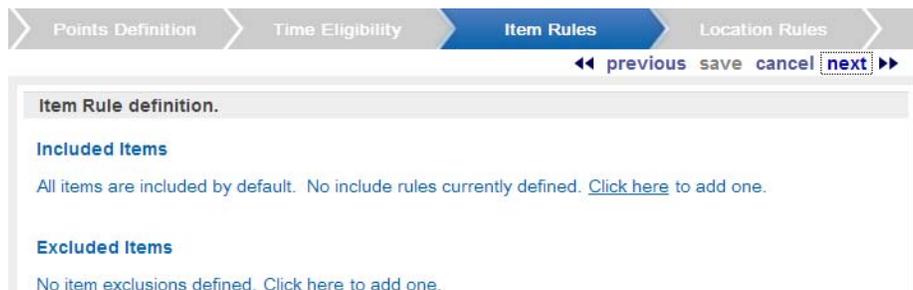
Figure 14-24: Item Rules Step

8. Define the Item Eligibility Rules for the Issue Rule.

- For instructions on configuring Item Eligibility Rules, see <u>Define Item Eligibility</u>.

- For more information about Item Eligibility Rules, see <u>Item Eligibility</u>.

9. Click **next** to continue.

The Location Rules step opens if the Define Eligibility Rules <u>Check Box</u> was selected at the Points Definition step, or if the Calculation Type selected at the Points Definition step is **The number of marketing engagements**.

Figure 14-25: Location Rules Step

10. Define the Location Eligibility Rules for the Issue Rule.

- For instructions on configuring Location Eligibility Rules, see <u>Define Location Eligibility</u>.

- For more information about Location Eligibility Rules, see <u>Location Eligibility</u>.

11. Click **next** to continue.

The Tender Rules step opens if the Define Eligibility Rules <u>Check Box</u> was selected at the Points Definition step. This step does not open if the Calculation Type selected at the Points Definition step is **The number of marketing engagements.**

Figure 14-26: Tender Rules Step

12. Define the Tender Eligibility Rules for the Issue Rule.

- For instructions on configuring Tender Eligibility Rules, see <u>Define Tender Eligibility</u>.

- For more information about Tender Eligibility Rules, see <u>Tender Eligibility</u>.

13. Click **next** to continue.

The Segment Eligibility step opens if the Define Eligibility Rules Check Box was selected at the Points Definition step, or if the Calculation Type selected at the Points Definition step is **The number of marketing engagements**.
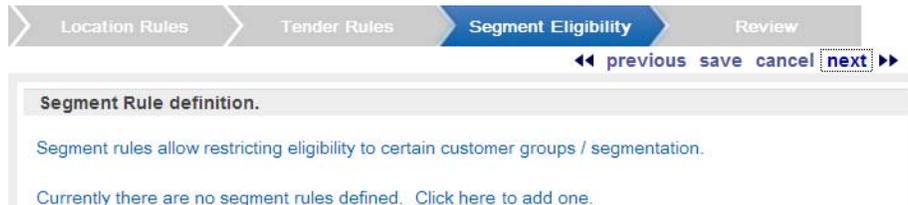
Figure 14-27: Segment Eligibility Step

14. Define the Segment Eligibility Rules for the Issue Rule.

  - For instructions on configuring Segment Eligibility Rules, see Define Segment Eligibility.

  - For more information about Segment Eligibility Rules, see Segment/Target Eligibility.

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.
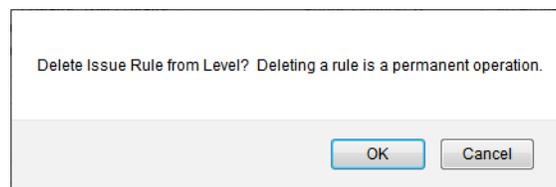
Figure 14-28: Confirmation Prompt

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 for more information.

View/Edit Award Rule

To open an Award Rule, click the Award Rule in the Award Rules Tab.

Figure 14-29: 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 Entitlement Coupon** - An Entitlement Coupon is issued to the Customer through an Award Program.

    * **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. Examples of coupons include a discount, free shipping, or a free gift.

- **Deal Coupon** - The Entitlement Coupon to issue. Displayed only if the Award Type is Issue Entitlement Coupon.

- **Precedence** - Order in which the Award Rule will be applied if more than one Award Rule is effective.

- **Issue Immediately Upon Transaction Posting** - This <u>Check Box</u> 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** *or* **Issue Entitlement Coupon**.

- **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.

- **Rule Parameters (Entitlement Coupon)** - Parameters determining the Entitlement Coupon that is given by the <u>Loyalty Program</u>, based on the Award Rule. This section contains the following fields:

  - **Points Cost Type** - Set to Fixed.

  - **Discount Type** - Set to the discount type specified for the selected Entitlement Deal.

  - **Award Program** - Set to the <u>Award Program</u> for the selected Entitlement Deal.

  - **Coupon Prefix** - The prefix for the Coupon Number.

  - **Expiration Period Type** - Indicates the type of period used in determining when the Entitlement Coupon 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 Entitlement Coupon expires.

- **Rule Parameters (E-Award)** - Parameters determining the E-Award that is given by the <u>Loyalty Program</u>, based on the Award Rule. This section contains the following fields:

  The fields in the Rule Parameters section for an E-Award will change depending upon the value in the Points Cost Type <u>Selection Menu</u>.

  - 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 <u>Award Program</u>) 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 14-30: Blank Award Rule

Enter the information for the Award Rule. See View/Edit Award Rule 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.

   Delete Award Rule from Level? Deleting a rule is a permanent operation.

   [OK]   [Cancel]

Figure 14-31: 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:

Actions ⬎

Delete Movement Rule

- **Delete Movement Rule** - Deletes the Movement Rule from the Loyalty Level. See Delete Movement Rule for more information.

View/Edit Movement Rule

To open a Movement Rule, click the Rule in the <u>Movement Rules Tab</u>. The Rule opens in the Movement Rule screen.

Figure 14-32: 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 <u>Check Box</u> 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.

- **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.

- **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 Periods** - The number of periods (from Test Period Type) used for the movement test (visible only 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 (visible only 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 (visible only if the Movement Rule is **Sustain**, and the Test Type is **Time Period Since Last Level Move**).

  See Extend a Sustain Period 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 (visible only 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, Customer Engagement will not run the same Movement Rule on that Account (unless the Account changes Loyalty Levels). So, to extend the period of time an Account remains at a Loyalty Level following a sustain Movement Rule, the sustain period must be extended.

To extend a sustain period, enter a check mark (☑) in the **Extend sustain period if customer meets the following criteria** Check Box. The following fields open:

Figure 14-33: 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 14-34: Blank Movement Rule

Enter the information for the Movement Rule. See View/Edit Movement Rule 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 14-35: 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.

Create New Program

To add a new Program to a <u>Card Definition</u>:

1. Select **Create New Program** in the <u>Actions Menu</u> for a <u>Card Definition</u> (see <u>Actions Menu</u>).

    > **Tip:** If there are no Programs defined for the <u>Card Definition</u>, Customer Engagement provides a **Click Here** <u>Link</u> for adding a Program.

    The Program Creation <u>Wizard</u> opens with the Program Type step.
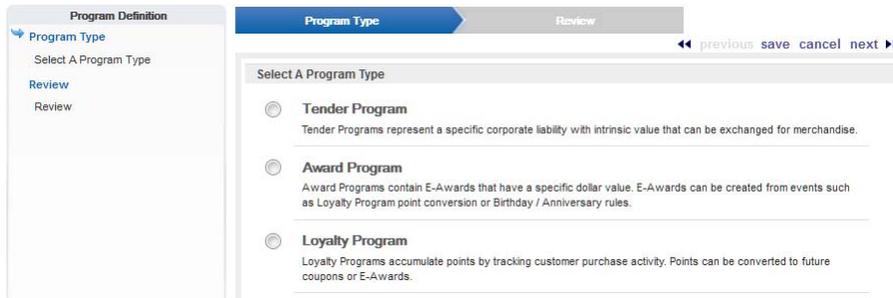
Figure 14-36: Create Program Wizard

    If any cards have already been generated for the Card Definition, a warning message indicates that adding a new program will start a background job, so it is advised to start the process during off hours.

2. Using the <u>Radio Buttons</u>, select the type of Program you are creating (see <u>Program Types</u> for a description of each Type).

    If there is already a Tender Program for the Card Definition, the option to create a Tender Program is not displayed.

3. Click **next** to continue.

    The General step opens.
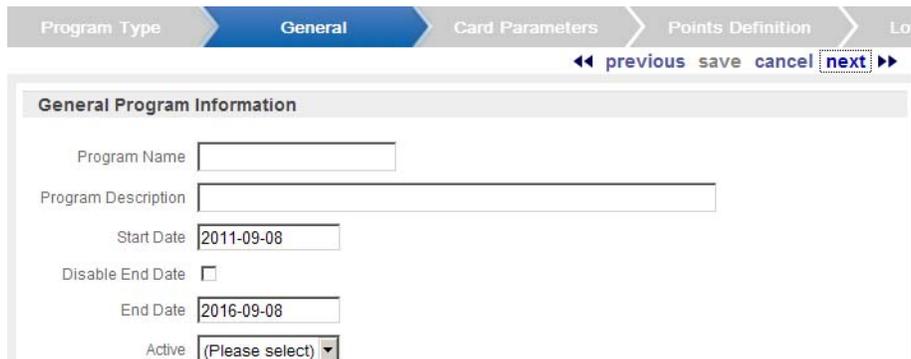
Figure 14-37: General Step

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 <u>Calendar Menu</u>.

- **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 <u>Calendar Menu</u> (active only 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 <u>Create a Tender Program</u>.

   - **Loyalty Program** - Continue with <u>Create a Loyalty Program</u>.

   - **Award Program** - Continue with <u>Create an Award Program</u>.

Create a Tender Program

To create a Tender Program:

1. Perform the steps described in <u>Create New Program</u>.

   The Card Parameters step opens.

Figure 14-38: 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 14-39: 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 (active only 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 (active only 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 (active only if Account Level Expiration Dates is set to **Yes**).

5. Click **next** to continue.

    The Tender Balances step opens.

Figure 14-40: 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 (active only if Initial Account Balance is set to **Yes**).

    -   **Initial Book Value** - The initial book value of the account (active only 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 14-41: 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 (active only if Preauth Expirations is set to **Yes**).

   - **Expire Pre-authorizations after (Periods)** - Indicates the type of period used for the pre-authorization expiration (active only 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 (active only if Allow Pre-authorizations and Preauth Expirations are both set to **Yes**).

9. Click **next** to continue.

   The Advanced Options step opens.

Figure 14-42: 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.

   The Card Parameters step opens.

Figure 14-43: 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 14-44: 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** - For informational and reporting purposes only.

- **Points Decimal Precision** - The number of decimal points used in tracking points.

5. Click **next** to continue.

The Loyalty Levels step opens.

Figure 14-45: Loyalty Levels Step

6. Define the parameters for the initial loyalty level:

> **Note:** Only one loyalty level is created during this process. Further loyalty levels can be created in the procedure [Add a Loyalty Level](#).

- **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 14-46: 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 (active only 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 (active only if Points Aging is set to **Reset after x periods** or **Reset after x rolling periods**).

- **Escrow Points** - Indicates whether points are escrowed before they become available for use as Earned Points.

  * **Checked** - Points are held as Escrow Points for a define period of time, after which they become available for use as Earned Points.

  * **Unchecked** - Points are immediately available for use as Earned Points.

- **Escrow Period** - Indicates the type of period used to determine the escrow time (active only if Escrow Points is **Checked**).

- **Escrow Periods** - Determines the number of periods (selected in Period Type) that will pass before points are made available (active only 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](#) 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](#) and [Add Movement Rule](#).

- [Add Issue Rule](#)

- [Add Award Rule](#)

Create an Award Program

To create an Award Program:

1. Perform the steps described in .

    The Card Parameters step opens.

Figure 14-47: 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 14-48: 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 (active only 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 (active only 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 14-49: 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** - Awards will expire based on a fixed date. If the award hasn't been redeem before that date it is considered expired.

    * **Rolling X** - The expiration date is defined when the coupon is first created, but as activity is performed on the award account the expiration date is recalculated (rolled ahead) based on the current date (activity). The purpose of this type is, if the customer is still shopping with you, but hasn't got around to using their coupon, the expiration date is extended as a courtesy.

- **Award Expiration Period Type** - Indicates the type of period used for determining the time period of the award expiration (active only 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 (active only 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.

See Add an Entitlement Deal for information on how to specify an Entitlement Deal for the Program.

15

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.

You can use this page to work with Tender Accounts, Award Accounts, and Loyalty Accounts.

About this Chapter

This chapter contains the following information:

- Card/Account Search - Describes the procedure for searching for a Card and its associated Account(s). Options include:
    - Open a Customer Card
- Card/Account Administration - Provides information and procedures for managing Cards and Accounts. Options include:
    - Basic Card/Account Information
    - Actions Menu
    - Open Customer Record
    - Activate Card
    - Deactivate Card
    - Set New Card Expiration Date
    - Merge Card
    - Account Information

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.
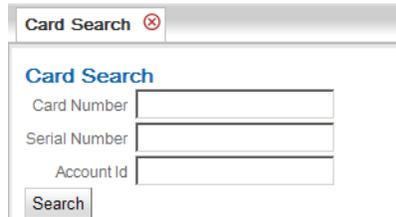
Figure 15-1: Card/Account Search Page

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.

     Note: If you enter search criteria in more than one field, the information in the different fields must be associated with the same Card; otherwise, the search fails.

3. Click the **Search** button, or press [Enter].

   - If a Card matches the entered criteria, the Card opens in Card/Account Administration.

Figure 15-2: Card/Account Administration

   - If no Card is found matching the entered criteria, an error message displays and no Card opens.

Figure 15-3: Card Not Found Error Message

Open a Customer Card

You can also open a Card through a Customer record. See Customer Lookup/Edit for instructions on opening a Customer record, and Open Card 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), including:

- Basic Card/Account Information

- Card/Account Administration with Attributes

- Actions Menu

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 15-4: Basic Card/Account Information

If there are multiple Card Accounts associated with the customer, the currently displayed Card Account is indicated with a downward-facing arrow, as in the above illustration.

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. Click the name to open Customer Record of the primary holder in the Customer Dashboard.

  - **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/Batch Number** - Series Number for the Card Series to which the Card belongs, and Batch Number for the Batch to which the Card belongs.

- **Card Origin** - Indicates where the Card originated. Set to Relate if the Card originated in Customer Engagement.

- **Card Type** - Type of Card.

- **Activation Date** - Date when the Card was/is activated.

- **Expiration Date** - Date when the Card expires.

- **First Used Date** - Date when the Card was first used.

- **Last Used Date** - Most recent date when 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.

Card/Account Administration with Attributes

Click Card Attributes to display Attributes for the Card, its Series, and its Type, and optionally to add or modify Attributes for the Card.

Figure 15-5: Card Account/Administration with Attributes

Item	Description
①	**Add Attribute** - Click to add a new Card Attribute. See Add Card Attribute for more information.
②	**Accounts** - Select to return to hide the Attribute information and return to the basic Card Account/Information screen. See Basic Card/Account Information for more information.
③	**Actions Menu** - Click to open a menu of actions that can be performed on the Card, without selecting a specific Account for the Card, such as an Award or Loyalty Account. See Actions Menu for more information.

Item	Description
④	**Card Type Attributes** - Displays any Attributes assigned to the Card Type, including for each: • Attribute Name • Attribute Value
⑤	**Card Series Attributes** - Displays any Attributes assigned to the Card Series, including for each: • Attribute Name • Attribute Value
⑥	**Card Attributes** - A List of Card Attributes currently assigned to the Card. See Work with Card Attribute for information on changing or deleting a Card Attribute. Information displayed for each Card Attribute: • **Name** - The Name of the Card Attribute. • **Value** - The current Value of the Card Attribute. • **Data Type** - The Card Attribute Data Type. Possible Data Types are: • **Character** - A string of characters entered through a Text Field. • **Number** - A number value entered through a Text Field. • **Currency** - A currency amount entered through a Text Field. • **Date** - A date entered through a Calendar Menu. • **Logical** - A true or false value entered through a Selection Menu. • **List** - One of a number of defined values selected through a Selection Menu. • **Unique** - Indicates whether the Attribute can be assigned more than once: • **Yes** - The Attribute can only be assigned to a Card once. • **No** - The Attribute can be assigned to a Card multiple times. • **Description** - The Description of the Card Attribute.

Add Card Attribute

To add a Card Attribute to a Card:

1. Click Add Attribute at the Card/Account Administration with Attributes screen.
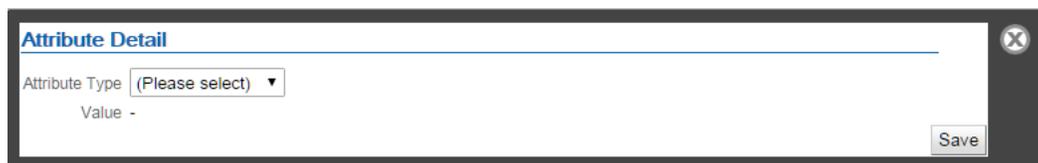
   An Attribute Detail window opens:

Figure 15-6: Attribute Detail Window (New Card Attribute)

2. Select the Attribute Type.

3. Enter or select the Value for the Attribute.

4. Click **Save**.

Work with Card Attribute

To change or delete an existing Card Attribute for a Card:

1. Click the Attribute from the List at the Card/Account Administration with Attributes screen.

   An Attribute Detail window opens:

Attribute Detail

Name	issue_loc
Description	issue location
Data Type	List
Unique	No
Value	kiosk

Save Delete
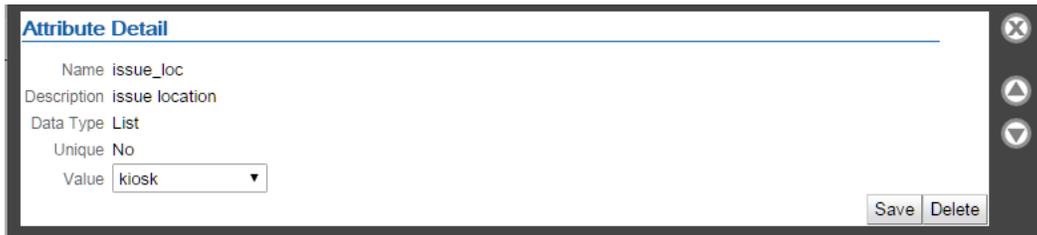
Figure 15-7: Attribute Detail Window (Existing Card Attribute)

2. To change the Card Attribute value, select or enter the new value and click **Save**.

3. To delete the Card Attribute value, click Delete.

Actions Menu

The Actions Menu for the Card/Account Administration page (without selecting either a specific account, such as an Award account) has the following options:

- **Activate Card** - Activate an inactive Card (only shown for inactive Cards). See Activate Card.

- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See Deactivate Card.

- **Reset Card Expiration Date** - Set a new expiration date for the card. See Set New Card Expiration Date.

- **Merge Card** - Merge the Card with another Card. See Merge Card.
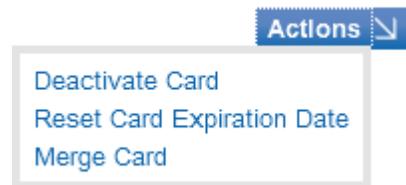
Open Customer Record

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:

- Activate Through the Actions Menu

- Activate Using the Card Status Link

Activate Through the Actions Menu

1. Click **Activate Card** in the Actions Menu.

   A Perform Action: Activate Card Window opens.

Figure 15-8: 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.

Activate Using the Card Status Link

1. Click the **Inactive** Card Status Link to open the Card Status menu.

Figure 15-9: Card Status Menu

2. Click **Activate Card**.

   A Perform Action: Activate Card Window opens (see Figure 15-8).

3. Enter the activation information for the Card:

   > **Note:** The fields available in the Activate Card Window may be different, depending upon the configuration and current status of the Series to which it belongs.

   - **Tender Activation Amount** - The amount issued by the activation of the Tender Account.

- **Loyalty Activation Points** - The number of points issued at the activation of the Loyalty Account.

- **Award Activation Coupon Amount** - The amount of the Coupon issued by the activation of an Award Account.

- **Currency** - The currency used for the Tender Activation Amount and/or the Award Activation Coupon Amount.

- **Franchisee** - The Franchisee associated with the Card.

- **Reason Code** - The reason for activating the Card.

- **Location** - The Location where the activation is being performed.

- **Comments** - Comments describing the reason for activating the Card.

4. Click **OK** to close the Window and activate the Card, or click **Cancel** to close the Window and keep the Card inactive.

Deactivate Card

There are two methods for deactivating an active Card:

- Deactivate Through the Actions Menu

- Deactivate Using the Card Status Link

Deactivate Through the Actions Menu

1. Click **Deactivate Card** in the Actions Menu.

   A Perform Action: Deactivate Card Window opens.
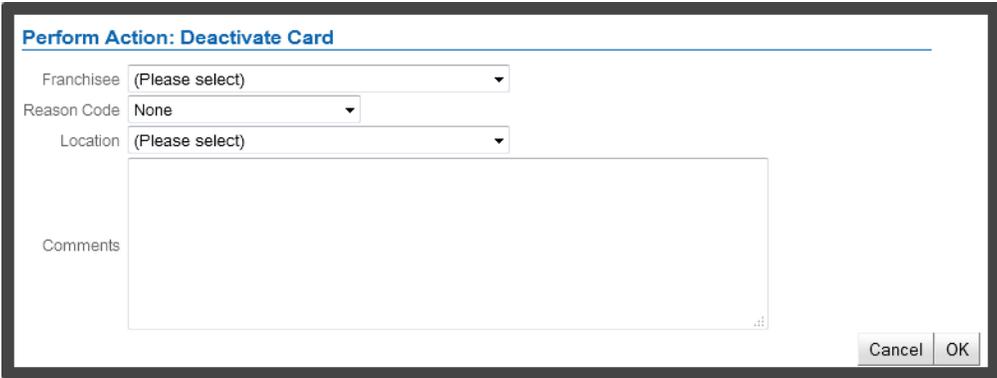
Figure 15-10: Perform Action: Deactivate Card Window

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.

Deactivate Using the Card Status Link

1. Click the **Active** Card Status Link to open the Card Status menu.
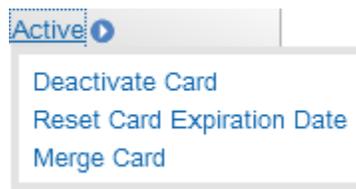
Figure 15-11: Card Status Menu

2. Click **Deactivate Card**.

   A Perform Action: Deactivate Card Window opens (see Figure 15-10).

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 Customer Engagement. 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 15-12: 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.
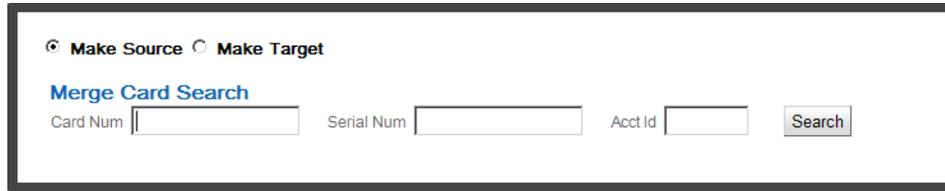
Figure 15-13: Merge Card Window

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.

     Note: If information is entered into more than one field, the information in each field must match the same Card. If the information is associated with different Cards, the search will not return any results.

4. Click **Search**.

   - If a Card matching the search criteria was found, the Card will be displayed in a List. Continue with the next step.

   - If no Cards matching the search criteria are found, an error message appears and no Cards are listed. Return to step 3.

5. To complete the merge, click to put a check mark (☑) in the **Merge Card** Check Box, then click the **Merge** button. The Cards are merged and the Window closes.

   To exit the Window without merging the Cards, click **Cancel**.

Account Information

Click the Account Number Link to view information about a specific Account. The information displayed for each Account depends upon its Account type: Tender Account, Award Account, or Loyalty Account.

Tender Account

The following information is displayed for each Tender Account:

Figure 15-14: 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 when the Account expires.

  > **Note:** If the Tender Account was merged with another Account, Customer Engagement will display the message "Account has been merged" below the Tender Account Administration area.
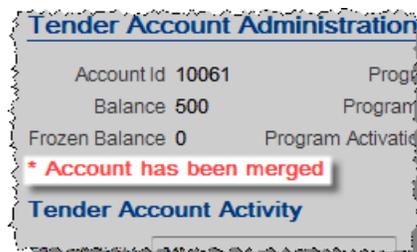
- **Tender Account Activity** - A List displaying each action performed on the Account.

  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, such as Deactivate. The default setting is All.

Tender Account Actions Menu

The Actions Menu for Tender Accounts displays the following options:

- **Activate Card** - Activate an inactive Card (only shown for inactive Cards). See Activate Card.

- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See Deactivate Card.

- **Reset Card Expiration Date** - Set a new expiration date for the card. See Set New Card Expiration Date.

- **Merge Card** - Merge the Card with another Card. See Merge Card.

- **Redeem** - Redeem an existing amount from the balance on the Card. See Redeem an Amount.

- **Reload** - Reload the Card with an additional amount. See Reload a Card.

- **Pre-Authorize** - Pre-authorize an amount on the Card. See Pre-Authorize an Amount.

- **Refresh Account Details** - Refresh/Reload the information displayed for the Account.
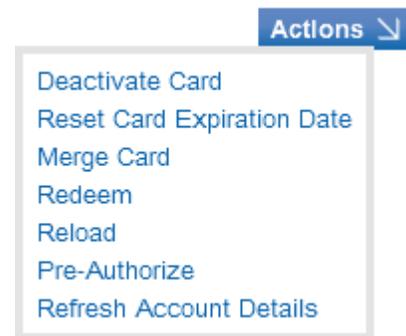
Redeem an Amount

To redeem an amount from a Card:

1. Click **Redeem** in the Tender Account Actions Menu for a Tender Account.

   A Perform Action: Redeem Window opens.
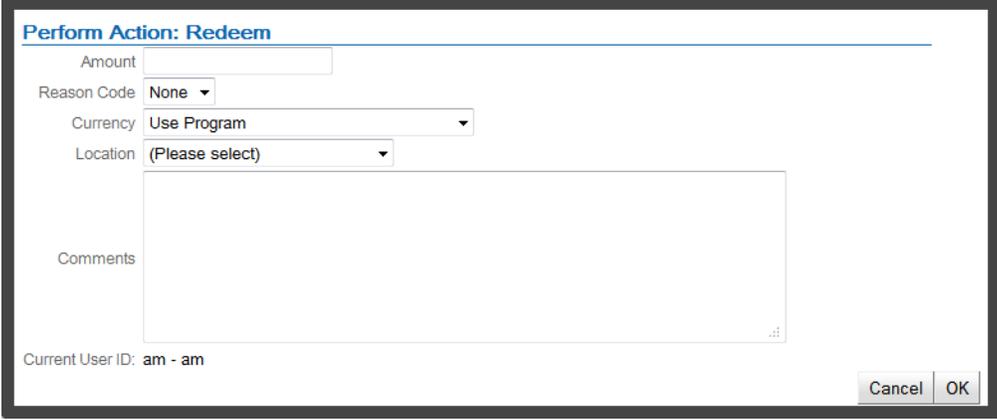
Perform Action: Redeem

Amount	
Reason Code	None ▾
Currency	Use Program ▾
Location	(Please select) ▾
Comments	

Current User ID: am - am

Cancel OK

Figure 15-15: 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 Tender Account Actions Menu for a Tender Account.

    A Perform Action: Reload Window opens.
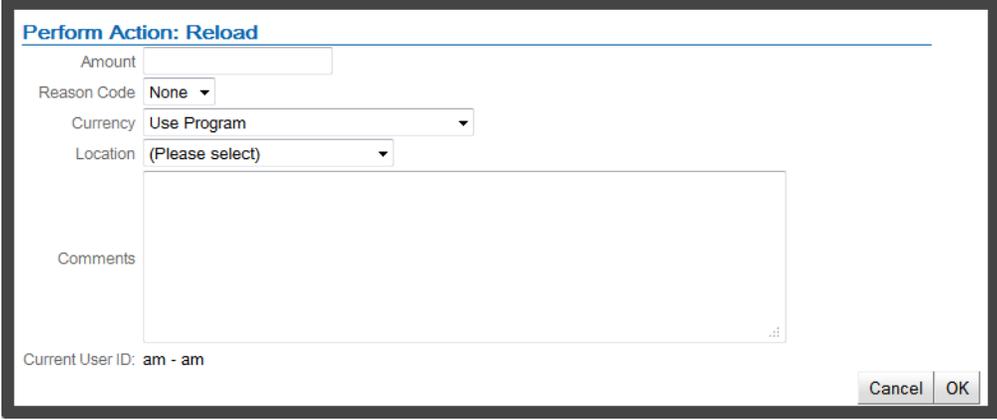
Figure 15-16: Perform Action: Reload Window

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 Tender Account Actions Menu for a Tender Account.

   A Perform Action: Pre-Authorize Window opens.
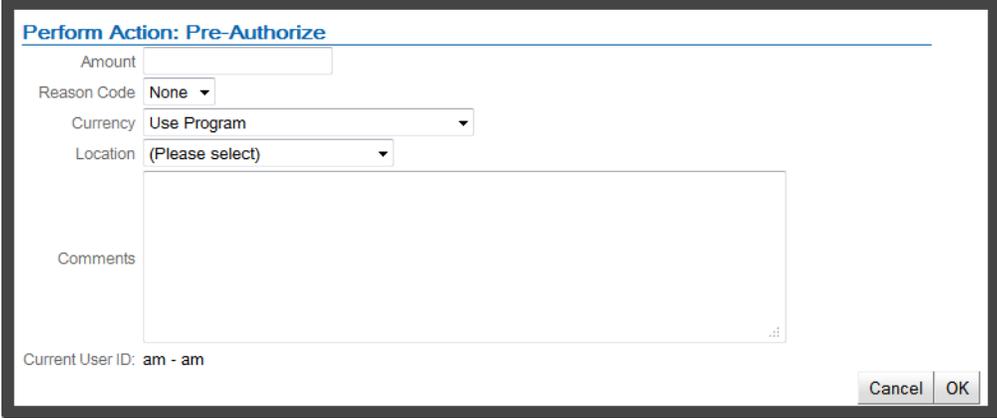
Figure 15-17: Perform Action: Pre-Authorize Window

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 a Tender Account. The activity displays in the Activity Detail Window.
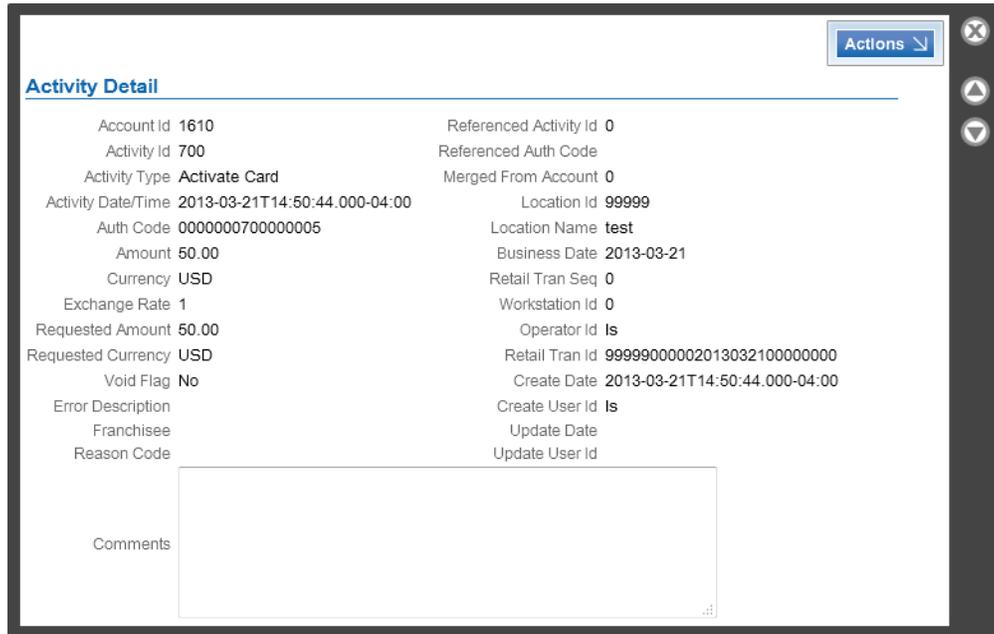
Figure 15-18: Activity Detail Window - Tender Account

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 when the activity was created.

- **Create User Id** - ID of the user who created the activity.

- **Update Date** - Date when 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).

- **Reverse** - Reverses the open activity (see Reverse an Activity).

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.
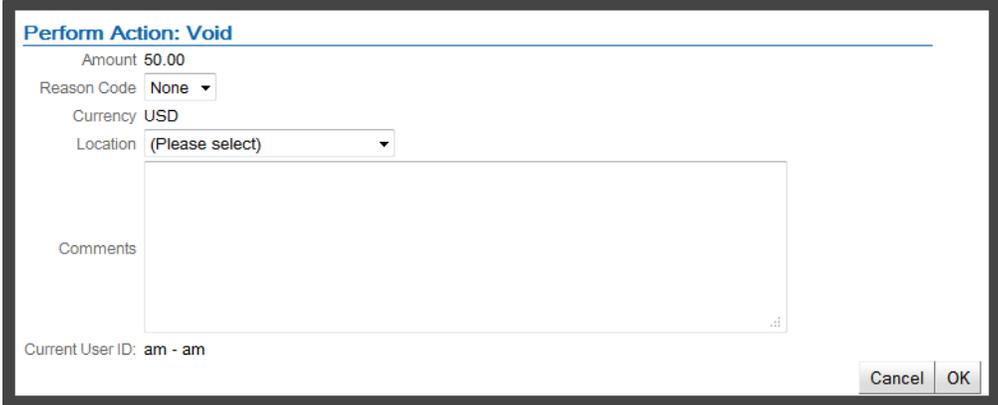
Perform Action: Void

Amount	50.00
Reason Code	None
Currency	USD
Location	(Please select)
Comments	
Current User ID:	am - am

Cancel   OK

Figure 15-19: 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.

<u>Reverse an Activity</u>

To reverse an activity on an Account:

1. Open the activity in the <u>Activity Detail Window</u>.

2. In the Activity Detail <u>Window</u>, select **Reverse** in the <u>Actions Menu</u>.

    A Perform Action: Reverse <u>Window</u> opens.

Figure 15-20: Perform Action: Reverse Window

3. Select the **Reason Code** for the Reverse in the <u>Selection Menu</u>.

4. Select the **Location** to be used for the Reverse in the <u>Selection Menu</u>.

5. Select the **Franchisee** in the <u>Selection Menu</u>.

6. Enter **Comments** describing the reasons for the Reverse.

7. Click the **OK** button to reverse the activity and close the <u>Window</u>, or click the **Cancel** button to close the <u>Window</u> without reversing the activity.

Award Account

The following information is displayed for each Award Account:

Figure 15-21: 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.

Card/Account Administration

- **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 when the Account expires.

> **Note:** If the Award Account was merged with another Account, Customer Engagement displays the message "Account has been merged" below the Award Account Administration area.
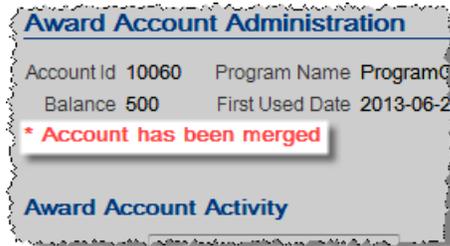
- **Award Account Activity** - A List displaying each action performed on the Account.

  The information in the List is determined by the Filter Activity Menu.

  This List uses Page Navigation to organize the actions.

  The following information is displayed for each Account action:

  - **Awd Tran Id** - Transaction ID of the activity on Account.

  - **Act Seq** - Sequence number of the activity within the transaction.

  - **Location Id** - ID of the location where the activity occurred.

  - **Activity Type** - Type of activity performed.

  - **Coupon Id** - ID number for the coupon (if any) created or redeemed by the activity.

  - **Coupon Type** - The coupon type. Included for an Entitlement Coupon or an E-Award.

  - **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, such as Activate or Issue Coupon. The default setting is All.

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Award Account 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.

- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See Deactivate Card.

- **Reset Card Expiration Date** - Set a new expiration date for the card. See Set New Card Expiration Date.

- **Merge Card** - Merge the Card with another Card. See Merge Card.

- **Issue Coupon** - Issue a Coupon to the Customer. See Issue a Coupon.

- **Expire Coupon** - Expire an E-Award or Entitlement Coupon so that it can no longer be redeemed. See Expire Coupon.

- **View Coupons** - View the Coupons that have been issued by the Award Account to the Customer. See View Coupons.

- **Refresh Account Details** - Refresh/Reload the information displayed for the Account.

- **Award Transfer** - Transfer one or more E-Awards or Entitlement Coupons to another Award Account for the same Program. This option is available only if the Card is linked to an active Customer. See Transfer Award.
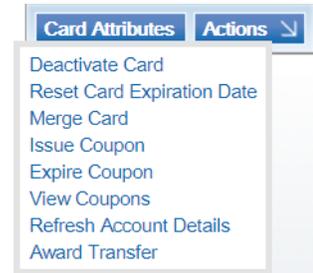
Issue a Coupon

To issue a Coupon to a Customer through an Award Account:

1. Click **Issue Coupon** in the Award Account Actions Menu.

    A Perform Action: Issue Coupon Window opens.

Figure 15-22: Issue Coupon Window

2. Enter the information for the Coupon:

    - **Certificate Type** - Use the Selection Menu to select either E-Award or Entitlement Coupon.

    - **Deal Coupon** - Use the Selection Menu to select the Entitlement Deal to issue if the Certificate Type is Entitlement 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). The Amount is displayed if a Certificate Type of E-Award is selected.

- **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 when the Coupon expires.

- **Expiration Date** - Use the Calendar Menu to select the date when 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.

Expire Coupon

To expire an E-Award or Entitlement Coupon for a Customer that was issued through an Award Account:

1. Click **Expire Coupon** in the Award Account Actions Menu.

   A Perform Action: Expire Coupon Window opens.
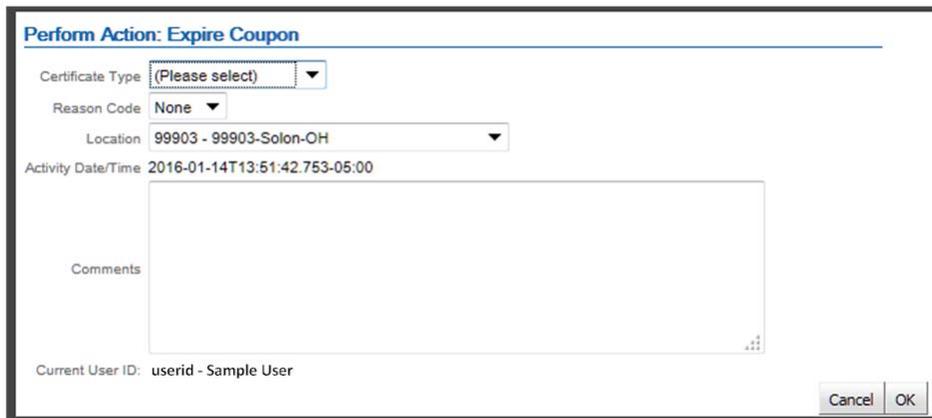
Figure 15-23: Expire Coupon Window

2. Enter the information for the Coupon:

- **Certificate Type** - Use the Selection Menu to select either E-Award or Entitlement Coupon.

- **Coupon** - Use the Selection Menu to select the Coupon to expire. The list of Coupons is displayed after you select the Certificate Type.

- **Reason Code** - Use the Selection Menu to select the reason for expiring the Coupon.

- **Location** - Use the Selection Menu to select the location where the Coupon is being issued.

- **Comments** - Enter any comments describing the Coupon expiration.

Click **OK** to expire the Coupon and close the Window, or click **Cancel** to close the Window without expiring the Coupon.

View Coupons

To view all of the Coupons issued to a Customer, select **View Coupons** in the Award Account Actions Menu to open a Coupons Window displaying a List of E-Award and Entitlement Coupons issued through the Account.

Figure 15-24: Coupons Window

E-Award Coupons: The following information is displayed for each E-Award Coupon issued and not expired:

- **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.

Entitlement Coupons: The following information is displayed for each Entitlement Coupon issued and not expired:

- **Coupon Id** - The ID number for the Coupon.

- **Deal Name** - The name of the Deal associated with the Coupon.

- **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 Award Account. The activity will be displayed in the Activity Detail Window.
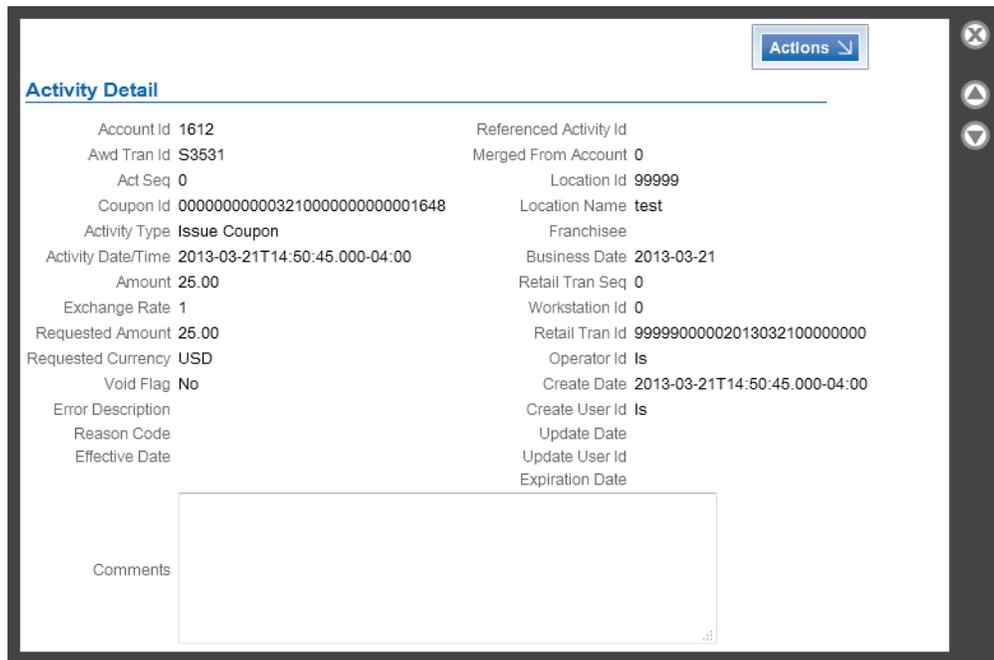
Figure 15-25: Activity Detail Window - Award Account

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, or removed from the Account in the case of a Transfer Out.

- **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.

- **Coupon Effective Date** - The date when the coupon becomes effective.

- **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 and time when the activity took place.

- **Create User Id** - ID of the user who created the activity.

- **Update Date** - Date when the activity was most recently updated.

- **Update User Id** - ID of the last user to update the activity.

- **Coupon Expiration Date** - The date when the coupon expires.

- **Comments** - Additional comments entered about the activity.

Actions Menu

The Actions Menu in the Activity Detail Window for the issue of an e-award or entitlement coupon has the following option:

- **Void** - Voids the open activity (see Void an Activity).

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.
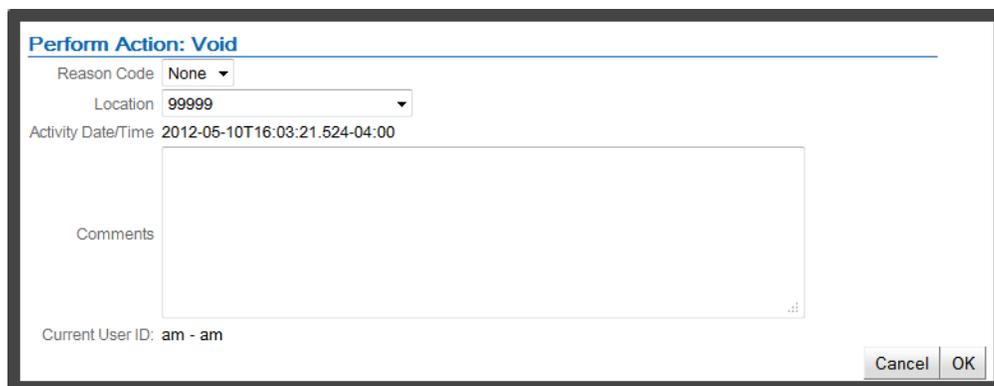
Figure 15-26: Perform Action: Void Window

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.

Transfer Award

To transfer one or more E-Awards or Entitlement Coupons to another Award Account for the same program, select Award Transfer from the [Award Account Actions Menu]. The Award Transfer page opens.
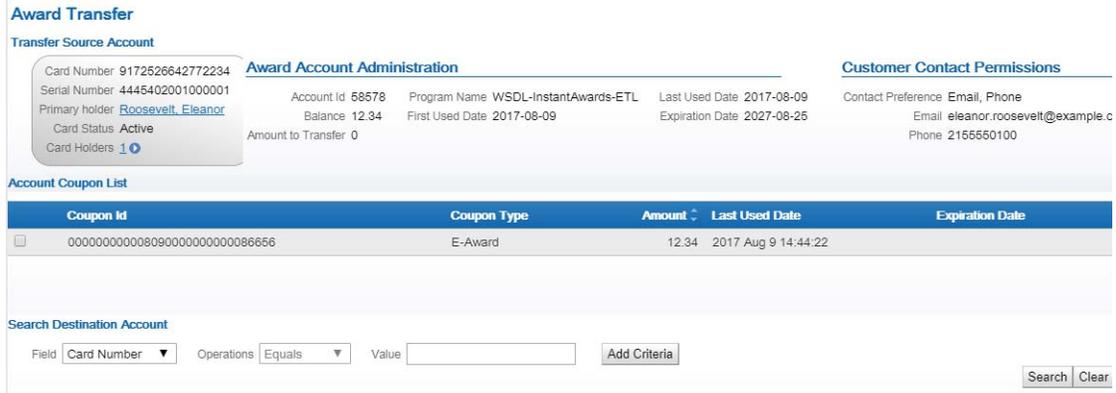
Figure 15-27: Award Transfer

The information on the Award Transfer page includes:

- **Transfer Source Account:**

  - **Card Number** - Card Number for the Card selected for award transfer.

  - **Serial Number** - Serial Number for the Card selected for award transfer.

  - **Primary holder** - Customer number and name of the primary account holder. Click the name to open Customer Record of the primary holder in the [Customer Dashboard].

  - **Card Status** - Indicates whether the Card is currently active.

  - **Card Holders** - Indicates the number of Customers associated with the Card. 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].

- **Award Account Administration:**

  - **Account id** - ID number for the Account.

  - **Balance** - Current award balance of the Account.

  - **Amount to Transfer** - The total amount of Award Coupons listed in the Account Coupon List area, below, that are currently selected for transfer.

  - **Program Name** - Name of the Program to which the Account belongs.

  - **First Activity Date** - Date of the first activity for the Award Account.

- **Last Used Date** - Date of the most recent activity for the Award Account.

- **Expiration Date** - Date, if any, when the Award Account is scheduled to expire.

- **Customer Contact Permissions:** The originating Customer can be notified of the transfer by an email or SMS message generated by an integrated marketing system, such as Responsys, if the Customer's contact permissions allow email or phone contact and if the marketing system supports it. See Points/Awards Transfer Notification Export for background.

  - **Contact Preference** - Indicates the preferred means for contact for the Customer, such as Email or Phone.

  - **Email** - The Customer's primary email address. Included if email is a preferred means of contact.

  - **Phone** - The Customer's primary phone number. Included if phone is a preferred means of contact.

    The Email or Phone listed is **None** if the contact information is not available, indicating that no email or SMS message can be generated. Also, even when the Customer has provided the email address or phone number, the Email Address or Phone is listed as None if the Contact Permission is set to No.

- **Account Coupon List:** Lists Award Coupons eligible for transfer. Only active Coupons with positive balances are listed.

  - **Coupon Id** - Unique identifier for the Award Coupon.

  - **Coupon Type** - E-Award or Entitlement Coupon.

  - **Amount** - The value of the Coupon.

  - **Last Used Date** - The date and time of the most recent activity for the Coupon.

  - **Expiration Date** - The date and time, if any, when the Coupon is scheduled to expire.

1. Use the Search Destination Account fields to find the Account to receive the Award Transfer. Only cards that are registered to Customers are eligible to receive transfers.

   Select the Field you want to search on and the Operator to use for searching, enter the Value, and click Search. For example, you can select a Field of Last Name and an Operator of Equals. You can also click Add Criteria to search on multiple Fields.

Figure 15-28: Search Destination Account Example

To clear the search fields and restore the default search selections, click Clear.

2.   Highlight the correct search result and click OK to select the Destination Account.
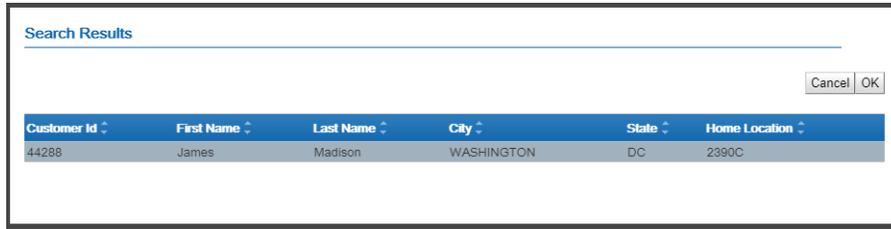
Figure 15-29: Search Results Window

The Account must be within the same Program, and the Customer must be the primary card holder.

When you select the Customer from the Search Results, the Transfer Destination Account information is displayed below the Search Destination Account area.
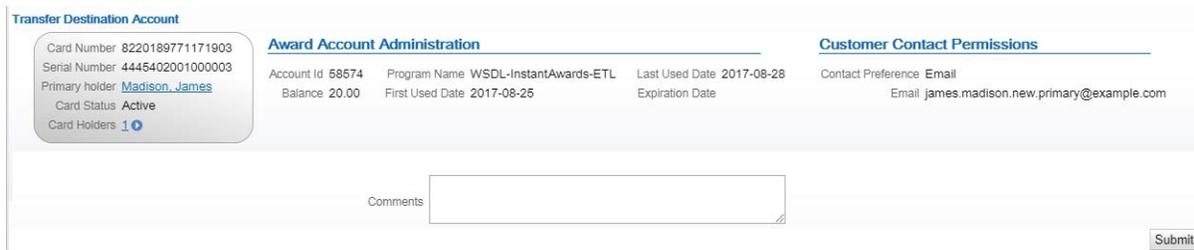
Figure 15-30: Transfer Destination Account Example

The **Transfer Destination Account** area includes the following information:

- **Card Number** - Card Number for the Card. If the selected Customer has more than one Card in the Program, the most recently used Card is selected and displayed.

- **Serial Number** - Serial Number for the Card.

- **Primary holder** - Customer number and name of the primary account holder. Click the name to open Customer Record of the primary holder in the Customer Dashboard.

- **Card Holders** - Indicates the number of Customers associated with the Card. 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.

- **Award Account Administration:**

    - **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 for the Award Account.

    - **Last Used Date** - Date of the most recent activity for the Award Account.

    - **Expiration Date** - Date, if any, when the Award Account is scheduled to expire.

- **Customer Contact Permissions:** The recipient can be notified of the transfer by an email or SMS message generated by an integrated marketing system, such as Responsys, if the Customer's contact permissions allow email or phone contact and if the marketing system supports it.

    - **Contact Preference** - Indicates the preferred means for contact for the Customer, such as Email or Phone.

    - **Email** - The Customer's primary email address. Included if email is a preferred means of contact.

    - **Phone** - The Customer's primary phone number. Included if phone is a preferred means of contact.

        The Email or Phone listed is **None** if the contact information is not available, indicating that no email or SMS message can be generated. Also, even when the Customer has provided the email address or phone number, the Email Address or Phone is listed as None if the Contact Permission is set to No.

3. Use the checkbox to the right of the Coupon Id in the Account Coupon List to select each Coupon to transfer from the Source Account to the Destination Account. The entire amount of each Coupon will be transferred.

4. Optionally, enter any **Comments**.

5. Click Submit.

The E-Award or Entitlement Coupon is transferred to the Destination Account. A Transfer In Activity Detail record is created for the Destination Account, and a Transfer Out Activity Detail record is created for the Source Account.

Loyalty Account

The following information is displayed for each Loyalty Account:

Figure 15-31: 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 when the Account expires.

Note: If the Loyalty Account was merged with another Account, Customer Engagement will display the message "Account has been merged" below the Loyalty Account Administration area.
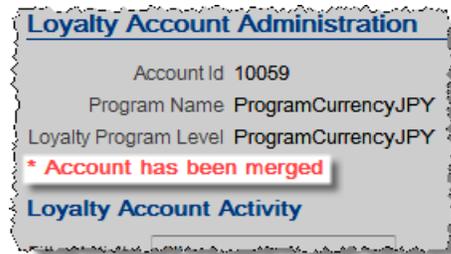
Loyalty Account Administration

Account Id 10059
Program Name ProgramCurrencyJPY
Loyalty Program Level ProgramCurrencyJPY
* 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, such as Change Level or Award. The default setting is All.

Loyalty Account 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.

- **Deactivate Card** - Deactivate an active Card (only shown for active Cards). See Deactivate Card.

- **Reset Card Expiration Date** - Set a new expiration date for the card. See Set New Card Expiration Date.

Card Attributes | Actions
Deactivate Card
Reset Card Expiration Date
Merge Card
Issue
Award
Change Level
Point Recovery
Refresh Account Details
Points Transfer
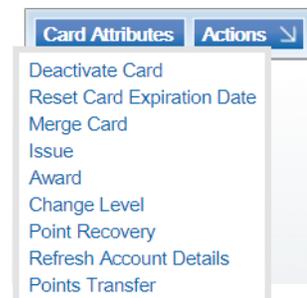
- **Merge Card** - Merge the Card with another Card. See [Merge Card](#).

- **Issue** - Issue points to a Loyalty Account. See [Issue Points](#).

- **Award** - Issue an award to a Customer. See [Issue an Award](#).

- **Change Level** - Change the Loyalty Level of the Loyalty Account. See [Change Level](#).

- **Point Recovery** - Issue points that were not issued to a Customer in a previous transaction. See [Recover Points](#).

- **Refresh Account Details** - Refresh/Reload the information displayed for the Account.

- **Points Transfer** - Transfer points to another Loyalty Account for the same Program. This option is available only if the Card is linked to an active Customer. See [Points Transfer](#).

Issue Points

To issue points to a Loyalty Account:

1. Click **Issue** in the [Loyalty Account Actions Menu](#) for a Loyalty Account.

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

Figure 15-32: Perform Action: Issue Window

2. Enter the information for issuing points:

    -   **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.

    -   **Number of Points** - The number of points to issue. For an Issue Rule whose Calculation Type is set to **The number of marketing engagements**, the Number of Points defaults from the **Fixed Amount** defined for the rule, but it can be overridden. See [Issue Rule](#) of the ["Programs"](#) chapter for background.

    -   **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.

This window does not prevent you from issuing points more often than specified for the Issue Rule when the Calculation Type is set to **The number of marketing engagements**. See Issue Rule of the "Programs" chapter for background.

Issue an Award

To issue an Award to an Account:

1. Click **Award** in the Loyalty Account Actions Menu for a Loyalty Account.

    A Perform Action: Award Window opens.

Figure 15-33: Perform Action: Award Window

2. Enter the information for issuing the 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 Coupon for the Loyalty Account. 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 Loyalty Account Actions Menu for a Loyalty Account.

   A Perform Action: Change Level Window opens.

Figure 15-34: 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 Loyalty Account Actions Menu for a Loyalty Account.

    A Perform Action: Search for Retail Transaction Window opens.

Perform Action: Search for Retail Transaction

Location Number

Register Id

Business Date

Seq. Number

Cancel   OK

Figure 15-35: 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 when 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.

Perform Action: Point Recovery

Retail Tran Id   0000000999010000001120120510000000000010101010

Reason Code   None

Location   99999

Comments

Current User ID: ameske - ameske

Cancel   OK

Figure 15-36: 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.

Points Transfer

To transfer points to another Loyalty Account for the same program, select Points Transfer from the Loyalty Account Actions Menu. The Points Transfer page opens.

Figure 15-37: Points Transfer

The information on the Points Transfer page includes:

- **Transfer Source Account:**

  - **Card Number** - Card Number for the Card selected for points transfer.

  - **Serial Number** - Serial Number for the Card selected for points transfer.

  - **Primary holder** - Customer number and name of the primary account holder. Click the name to open Customer Record of the primary holder in the Customer Dashboard.

  - **Card Status** - Indicates whether the Card is currently active.

  - **Card Holders** - Indicates the number of Customers associated with the Card. 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.

- **Loyalty Account Administration:**

  - **Account id** - ID number for the Account.

  - **Program Name** - Name of the Program to which the Account belongs.

  - **Loyalty Program Level** - The current level of the Loyalty Account.

  - **Escrow Points** - Number of points currently escrowed in the Account.

  - **Earned Points** - Current points balance of the Account.

  - **Program Currency** - Base currency for the 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 Used Date** - Date of the first activity for the Loyalty Account.

- **Last Activity Date** - Date of the most recent activity for the Loyalty Account.

- **Expiration Date** - Date, if any, when the Loyalty Account is scheduled to expire.

• **Customer Contact Permissions:** The originating Customer can be notified of the transfer by an email or SMS message generated by an integrated marketing system, such as Responsys, if the Customer's contact permissions allow email or phone contact and if the marketing system supports it. See [Points/Awards Transfer Notification Export](#) for background.

- **Contact Preference** - Indicates the preferred means for contact for the Customer, such as Email or Phone.

- **Email** - The Customer's primary email address. Included if email is a preferred means of contact.

- **Phone** - The Customer's primary phone number. Included if phone is a preferred means of contact.

  The Email or Phone listed is **None** if the contact information is not available, indicating that no email or SMS message can be generated. Also, even when the Customer has provided the email address or phone number, the Email Address or Phone is listed as None if the Contact Permission is set to No.

1. Use the **Search Destination Account** fields to find the Account to receive the Points Transfer. Only Accounts that are associated with a Customer are eligible to receive transferred points.

   Select the Field you want to search on and the Operator to use for searching, enter the Value, and click Search. For example, you can select a Field of Last Name and an Operator of Equals. You can also click Add Criteria to search on multiple Fields.

Figure 15-38: Search Destination Account Example

2. Highlight the correct search result and click OK to select the Destination Account.

Figure 15-39: Search Results Window

The Account must be within the same Program, and the Customer must be the primary card holder. Only active cards can receive points.

When you select the Customer from the Search Results, the Transfer Destination Account information is displayed below the Search Destination Account area.

Figure 15-40: Transfer Destination Account Example

The **Transfer Destination Account** area includes the following information:

- **Card Number** - Card Number for the Card. If the selected Customer has more than one Card in the Program, the most recently used Card is selected and displayed.

- **Serial Number** - Serial Number for the Card.

- **Primary holder** - Customer number and name of the primary account holder. Click the name to open Customer Record of the primary holder in the Customer Dashboard.

- **Card Holders** - Indicates the number of Customers associated with the Card. 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.

- **Award Account Administration:**

  - **Account Id** - ID number for the Account.

  - **Program Name** - Name of the Program to which the Account belongs.

  - **Loyalty Program Level** - The current level of the Loyalty Account.

  - **Escrow Points** - Number of points currently escrowed in the Account.

  - **Earned Points** - Current points balance of the Account.

  - **Program Currency** - Base currency for the 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 for the Loyalty Account.

  - **Last Used Date** - Date of the most recent activity for the Loyalty Account.

  - **Expiration Date** - Date, if any, when the Award Loyalty is scheduled to expire.

- **Customer Contact Permissions:** The recipient can be notified of the transfer by an email or SMS message generated by an integrated marketing system, such as Responsys, if the Customer's contact permissions allow email or phone contact and if the marketing system supports it.

- **Contact Preference** - Indicates the preferred means for contact for the Customer, such as Email or Phone.

- **Email** - The Customer's primary email address. Included if email is a preferred means of contact.

- **Phone** - The Customer's primary phone number. Included if phone is a preferred means of contact.

The Email or Phone listed is **None** if the contact information is not available, indicating that no email or SMS message can be generated. Also, even when the Customer has provided the email address or phone number, the Email Address or Phone is listed as None if the Contact Permission is set to No.

3. Enter the **Number of points to transfer**. Your entry cannot exceed the Earned Points balance for the Transfer Source Account.

4. Optionally, enter any **Comments**.

5. Click Submit.

The Points are transferred to the Destination Account. A Transfer In Activity Detail record is created for the Destination Account, and a Transfer Out Activity Detail record is created for the Source Account.

Activity Detail Window

Click an activity to view detailed information about an activity in the List of activities displayed for a Loyalty Account. The activity will be displayed in the Activity Detail Window.
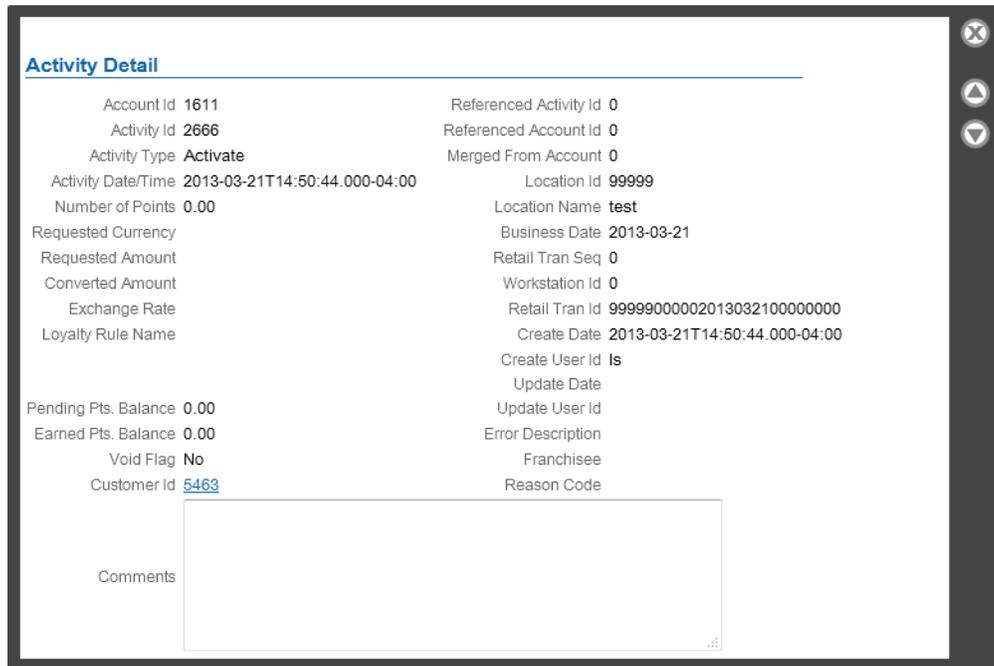
Figure 15-41: Activity Detail Window - Loyalty Account

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, or subtracted in the case of an activity such as Change Level or Transfer Out.

- **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.

- **Customer Id** - Included for a [Points Transfer](#) between loyalty accounts. The Customer Id is a link to the other Customer involved in the transfer: either the Customer originating the transfer or the recipient.

- **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 when the activity was created.

- **Create User Id** - ID of the user who created the activity.

- **Update Date** - Date when 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.

- **Actions** button - This button is displayed only for Issue point activities that are still in Escrow. The options are:

- Void - Select this option to void the escrowed points before they are earned.

- **Change Earn Date** - Select this option to change the date the escrowed points will be moved to earned.

16

Location Management

Overview

In Customer Engagement, 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 - Provides the procedure for searching for a Location. Options include:
  - Location Lookup

- Location List - Describes the Location List page and the functionality available within it. Options include:
  - More Actions Menu
  - Open a Location

- Location Window - Describes the Location Window and its functionality. Options include:
  - Open Location Dashboard
  - More Actions Menu

- Location Dashboard - Describes the Location Dashboard and its functions. Options include:
  - Location Actions Menu

- Edit Location Data - Describes the methods for editing information about a Location.

- Edit Location Attributes - Describes the methods for creating, updating, and deleting Attributes assigned to a Location. Options include:
  - Update an Attribute
  - Add an Attribute
  - Delete an Attribute

- Create a Location - Provides the procedure for creation a Location in Customer Engagement

Location Search

The Location Search page is used to search for Locations and Location information stored in Customer Engagement. 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 16-1: Location Search Page

Location Lookup

To look up a Location in Customer Engagement:

1. Open the Location Search page.

    -   Use the **Admin->Location** menu option from anywhere in Customer Engagement.

    -   Click the **Search** button in the Location List.

2. Enter the search information for the Location.

    > **Tip:** Be as specific as possible when entering search information. The more specific the information, the fewer Location records will be returned.

    The Location Search page uses the following Data Elements for search entry:

    -   **Attribute** - If a value is selected in this Selection Menu, Customer Engagement 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, Customer Engagement will only search for the data in the specified Attribute's values.

        *   If **All Attributes** is selected in the Attribute Selection Menu, Customer Engagement 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.

Customer Engagement 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 16-2: Location List

Table 16-1: *Location List Page Key*

Item	Description
①	**Search Button** - Click to return to the Location Search page. See Location Search 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 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 Customer Engagement. See Create a Location.

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.
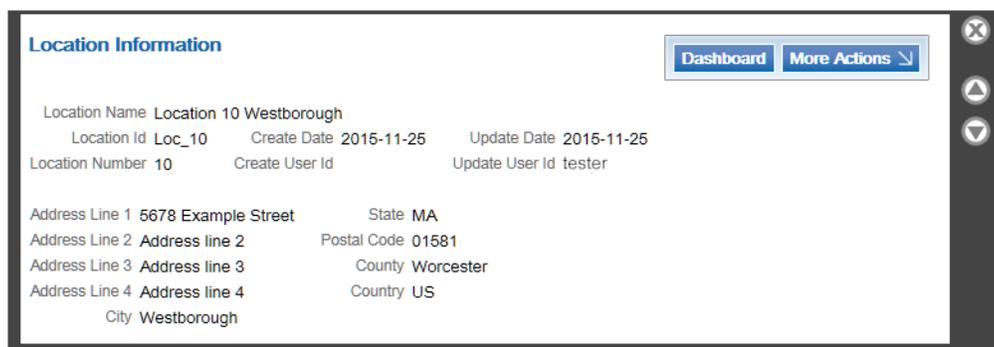
Figure 16-3: Location Window

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.

Location Dashboard

The Location Dashboard allows a user to view all information about a Location.
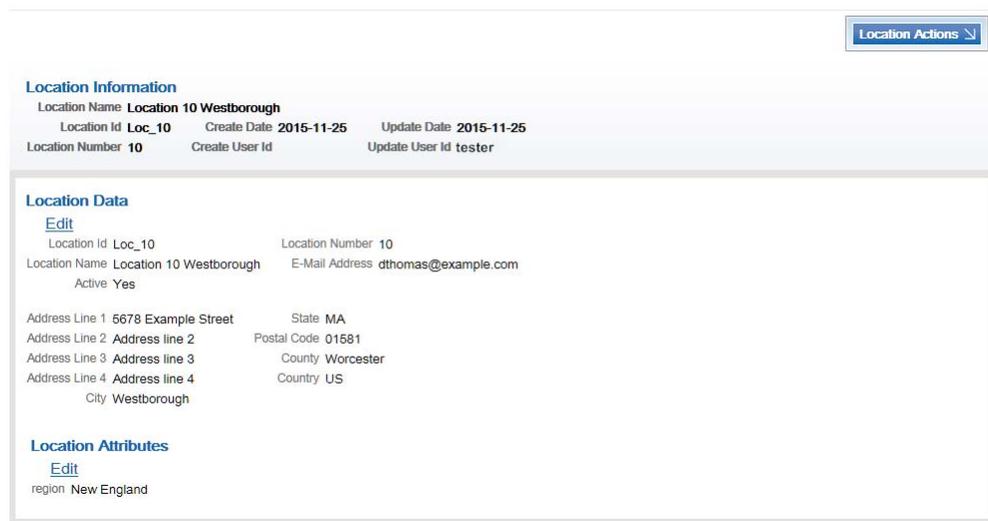
Figure 16-4: Location Dashboard

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 for more information.

- **Attributes** - Edit Attribute information for the Location. See Edit Location Attributes 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 16-5: 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 Customer Engagement 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
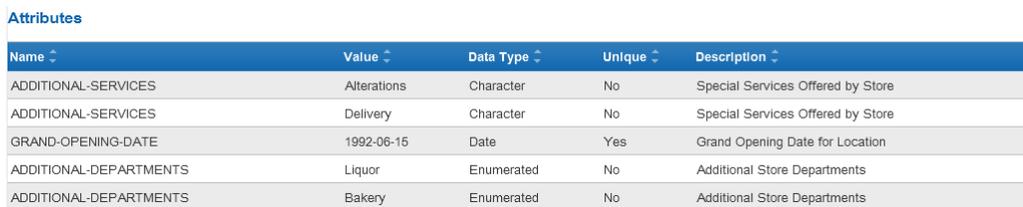
Name ⇕	Value ⇕	Data Type ⇕	Unique ⇕	Description ⇕
ADDITIONAL-SERVICES	Alterations	Character	No	Special Services Offered by Store
ADDITIONAL-SERVICES	Delivery	Character	No	Special Services Offered by Store
GRAND-OPENING-DATE	1992-06-15	Date	Yes	Grand Opening Date for Location
ADDITIONAL-DEPARTMENTS	Liquor	Enumerated	No	Additional Store Departments
ADDITIONAL-DEPARTMENTS	Bakery	Enumerated	No	Additional Store Departments

Figure 16-6: Edit Location Attributes Screen

2. Perform the necessary procedure(s):

   - Update an Attribute

   - Add an Attribute

   - Delete an Attribute

Update an Attribute

1. Click the Attribute to update.

   The Attribute opens in an Attribute Detail Window.
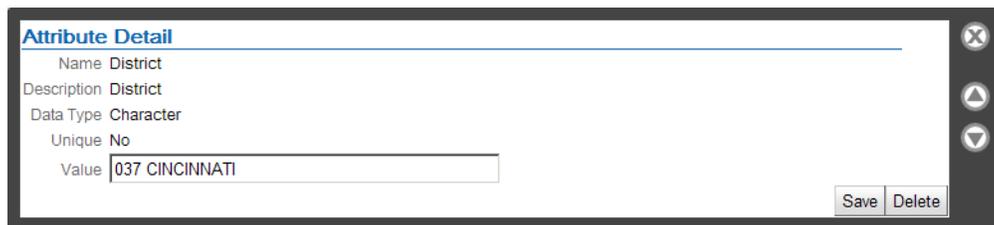
Attribute Detail

Name	District
Description	District
Data Type	Character
Unique	No
Value	037 CINCINNATI

Save   Delete

Figure 16-7: Attribute Detail Window

2. Change the value of the Attribute.

   - If the Attribute Data Type is **Character**, **Number**, or **Currency**, enter the new value in the Text Field.

   - If the Attribute Data Type is **Date**, select the new value in the Calendar Menu.

   - If the Attribute Data Type is **List** or **Logical**, select the new value in the Selection Menu.

3. Click the **Save** button to save the Attribute with the new value and return to Edit Location Attributes.

Add an Attribute

1. Click the **Add Attribute** button.

   A blank Attribute Detail Window opens.

2. Use the Attribute Type Selection Menu to select the Attribute to add.

   The Attribute Type data populates the Attribute Detail Window fields.

Figure 16-8: 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 <u>Window</u>.
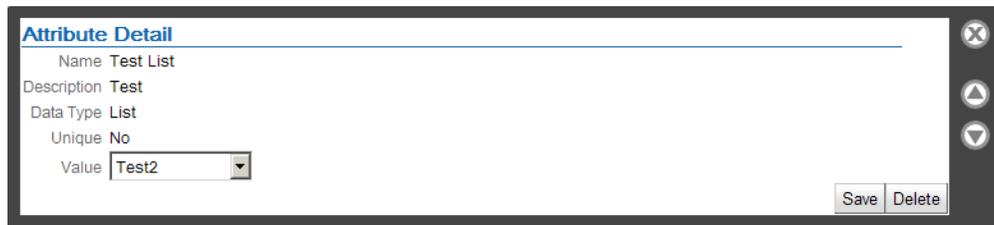
Figure 16-9: Attribute Detail Window

2. Click the **Delete** button to delete the Attribute from the Location and return to <u>Edit Location Attributes</u>.

Create a Location

To create a Location in Customer Engagement:

1. Perform a <u>Location Lookup</u>.

   A <u>List</u> of Locations is displayed.

2. Click **Add Location** in the <u>More Actions Menu</u>.

   The Create Location page opens.
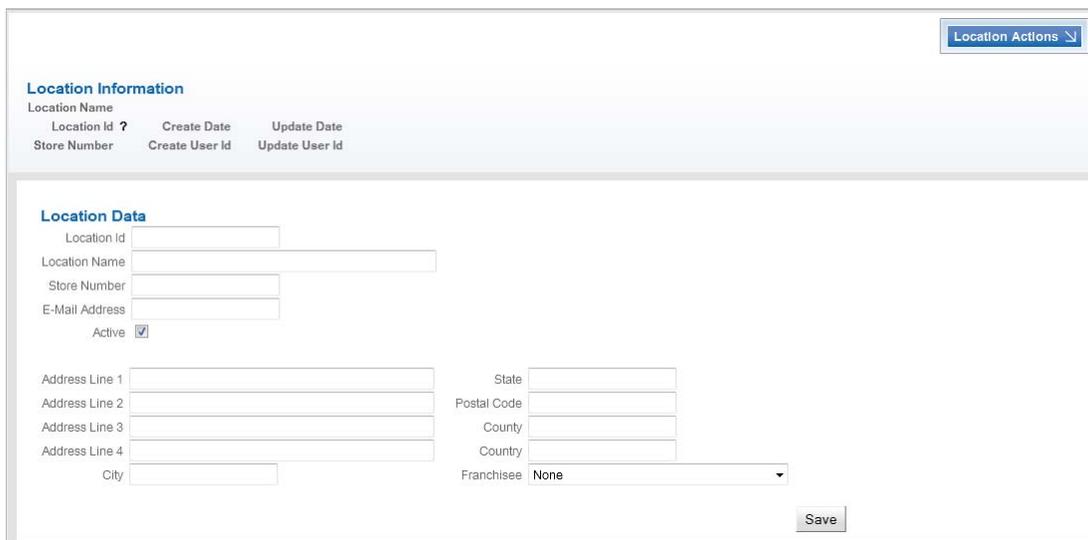
Figure 16-10: Create Location Page

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 Customer Engagement opens the Location Dashboard for the new Location.

5. If necessary, define the Attributes for the Location. See Edit Location Attributes for a description of the procedure.

17

Attributes

Overview

The chapter describes the methods and procedures for creating and managing Attributes in Customer Engagement.

Attributes provide additional, descriptive information about a Customer Engagement element. This information can be used to further define and/or group individual elements within Customer Engagement, beyond what Customer Engagement 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, Cards, Card Types, or Card Series. 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.

> **Important:** The AttributeDefinition role is required to access this area of Customer Engagement and perform the functions available in it. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information.

About this Chapter

This chapter contains the following information:

- Attribute Definition List - Describes the Attribute Definition List and the functionality available in it. Options include:
  - Actions Menu
  - Filter Menu
  - Open an Attribute
- Edit Attribute Definition Window - Describes how to use this window to edit an attribute. Options include:
  - Edit an Attribute
  - Delete an Attribute
- Create a New Attribute - Describes how to create a new attribute.

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.
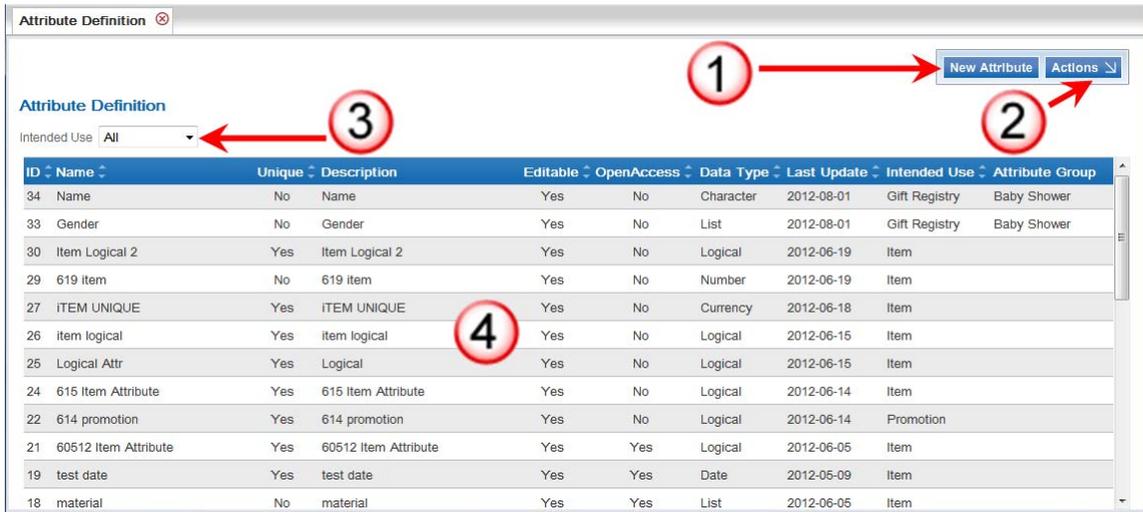
Figure 17-1: Attribute List

Table 17-1: *Attribute List Page Key*

Item	Description
	New Attribute Button - Click to create a new Attribute. See Create a New Attribute for more information.
	Actions Menu - Click to open a menu of actions that can be performed in the Attribute List page. See Actions Menu for more information.
	Filter Menu - Select criteria in the Filter Menus to view a subset of the Attributes in the Attribute List. See Filter Menu for more information.

Table 17-1: *Attribute List Page Key (continued)*

Item	Description
④	**Attributes** - A <u>List</u> of Attributes currently in the system. The <u>List</u> displays a limited number of Attributes; use the Filter Menu to narrow down the <u>List</u> and locate a certain Attribute.

This <u>List</u> includes the following information for each Attribute:

- **ID** - Unique ID for the Attribute.

- **Name** - Name of the Attribute.

- **Unique** - Indicates whether only one of this Attribute can be set for each element it is assigned to.

- **Description** - A description of the Attribute.

- **Editable** - Indicates whether the Attribute can be edited by any User with permission to edit Customer records (**Yes**), or if the Attribute can only be edited by a User with system administration access (**No**). *This field is only used by Customer Attributes.*

- **OpenAccess** - Indicates whether the Attribute has Open Access. *This field is only used by Customer Attributes.*

- **Data Type** - The type of data stored in the Attribute value.

- **Last Update** - Most recent date on which the Attribute was changed.

- **Intended Use** - The element to which the Attribute is to be assigned.

- **Attribute Group** - The Attribute Group to which the Attribute belongs.

Actions Menu

The <u>Actions Menu</u> for the Attribute Definition <u>List</u> 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 <u>List</u> includes the following <u>Filter</u> menu:
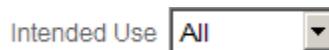
Figure 17-2: Filter Menu

- **Intended Use** - Filters the <u>List</u> 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.

   - **Wish List** - Show only Wish List Attributes.

- **Segment** - Show only Segment Attributes.

- **Deal** - Show only Deal Attributes.

- **PromoDeal** - Show only Promo-Deal Attributes.

- **Card Type** - Show only Card Type Attributes.

- **Card Series** - Show only Card Series Attributes.

- **Card** - Show only Card Attributes.

Open an Attribute

To open an Attribute, click the Attribute in the Attribute Definition List. The Attribute opens in an Edit Attribute Definition Window.

Edit Attribute Definition Window

The Edit Attribute Definition Window allows users to view and edit Attribute information.

Figure 17-3: 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.

  - **Wish List** - Can be assigned to Wish Lists.

  - **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 Type** - Can be assigned to Card Definitions.

- **Card Series** - Can be assigned to Card Series.

- **Card** - Can be assigned to individual 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.

- **Publish to Batch Exporter** - Indicates whether the attribute is eligible to be included in a batch export to a Marketing system such as Responsys or a BI/Analytics system such as Retail Insights. Included only for attribute types that support batch export, such as Customer or Segment.

  - **Checked (☑)** - The Attribute value can be included in a batch export.

  - **Unchecked (☐)** - The Attribute value cannot be included in a batch export.

- **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 17-4: 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

Note: Attributes can be deleted only if they are not actively used. Once an Attribute has been actively used, it cannot be deleted.

To delete an attribute:

1. Open an Attribute in an Edit Attribute Definition Window.

2. Click the **Delete** button.

   A confirmation prompt opens.
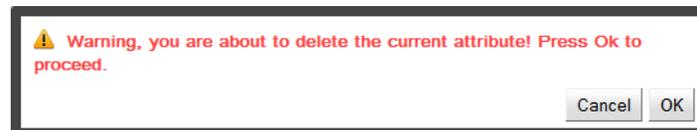
Figure 17-5: Delete Attribute Confirmation

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 <u>Attribute Definition List</u> page, click the **New Attribute** button.

    A Create Attribute Definition <u>Window</u> opens.

Figure 17-6: 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 <u>Selection Menu</u> 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.

        * **Wish List** - The Attribute will be assigned to Customer Wish Lists.

        * **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 Type** - The Attribute will be assigned to Card Definitions.

        * **Card Series** - The Attribute will be assigned to Card Series.

        * **Card** - The Attribute will be assigned to Cards.

    - **Attribute Group** - This <u>Selection Menu</u> determines the Attribute Group to which the Attribute belongs. Select the Attribute Group, or select **(Add Group)** to create a new Attribute Group.

If you select **(Add Group)**, a Text Field opens. Enter the name of the new Attribute Group in the Text Field.

- **Description** - A description of the Attribute.

- **Unique** - This Check Box determines whether the Attribute can be assigned to an element more than once.

    * **Checked ( )** - The Attribute can only be assigned to an element once.

    Note: 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.

- **Publish to Batch Exporter** - This Check Box determines whether each Attribute value can be included in batch export to a Marketing system such as Responsys or a BI/Analytics system such as Retail Insights. *This option is available if* **Intended Use** *is set to* **Customer** *or* **Segment**.

    * **Checked ( )** - The Attribute can be included in batch export.

    * **Unchecked ( )** - **[DEFAULT]** The Attribute cannot be included in batch export.

- **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 active only if Intended Use is set to* **Customer**, *or if the User has the 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 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 17-7: 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 17-8: 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.

18

Tasks

Overview

Tasks define responsibilities for Users. Users are expected to log into Customer Engagement each workday to check their Tasks for the day.

About this Chapter

This chapter includes the following information:

- My Tasks - 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. Options include:

  - Actions Menu

  - Filter Menus

  - Change Task Status

  - Open/Edit a Task

  - Reassign a Task

- Search Tasks - This screen is used to search for Tasks throughout Customer Engagement. Depending upon the permissions given to the User, the User can use this screen to search for Tasks assigned to other Users. Options include:

  - Search Tasks Screen

  - Actions Menu

  - Select Users From Hierarchy

- Task List - Provides more details on the Task List page:

  - Actions Menu

  - Filter Menus

- Edit Task Window - 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. Options include:

  - Actions Menu

  - Open/Edit a Task

  - Add/Change User

  - Remove a User

  - Add/Change Customer

- [Remove a Customer](#)

- [Add a Note](#)

- [Create a Task](#) - Describes how to create a task.

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.
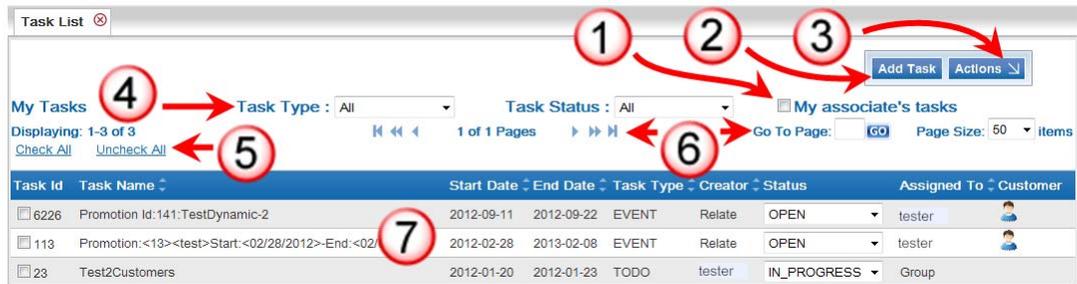
Figure 18-1: My Tasks

Table 18-1: *Task List Page Key*

Item	Description
①	**My Associate's Tasks** - This Check Box determines whether the Tasks List displays the current User's Tasks, or the Tasks for the associates that the current User manages. *This Check Box is only available for Users designated as Managers.* See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about configuring Users.
②	**Add Task Button** - Click to create a new Task. See Create a Task 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 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 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 18-1: *Task List Page Key (continued)*

Item	Description
⑦	**Tasks** - A List of Tasks currently in the system. The List displays a limited number of Tasks; use the Filter Menu to narrow down the List and locate a certain Task. This List includes the following information for each Task: • **Task Id** - ID of the Task. • **Task Name** - Name of the Task. • **Start Date** - Date on which the Task starts. • **End Date** - Date on which the Task ends. • **Task Type** - Type of Task. • **Creator** - ID of the User who created the Task. • **Status** - Status of the Task. • **Assigned To** - ID of the User to whom the Task is assigned. • **Customer** - Indicates whether the Task is associated with a Customer; if it is, an icon (👤) will appear in this field.

Actions Menu

The Actions Menu for the Task List page has the following options:

- **Refresh** - Refreshes the list of Tasks, showing any changes made to the list in the time since it was opened.

- **Re-assign** - Reassign the Task to a different User. See Reassign a Task.

Filter Menus

The Task List includes the following Filter menus:

Figure 18-2: 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 the *Oracle Retail Customer Engagement Cloud Services Implementation 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.

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.
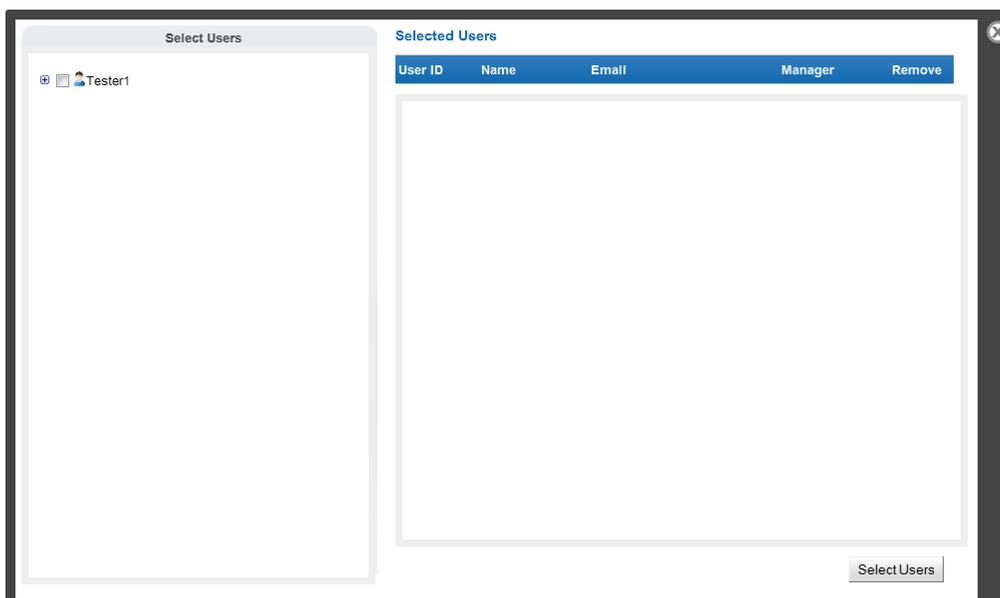
Figure 18-3: Reassign User Window

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).
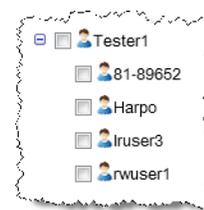
    -   Only one User can be selected for APPOINTMENT, EVENT, TODO, and MEETING, and TASK type Tasks.
    -   One or more User(s) can be selected for ADMIN Tasks.

The User(s) appears in the Selected Users <u>List</u>.

Figure 18-4: Assign User Window - User Selected

6. Click the **Select Users** button to change the assigned User and close the <u>Window</u>.

- To replace the User, enter a check mark (☑) in the <u>Check Box</u> for a different User.

- To remove a User, click the **Remove** <u>Link</u>.

- To close the <u>Window</u> without changing the assigned User, click the **X** (☒) in the top-right corner of the <u>Window</u>.

Search Tasks

The Search Tasks screen provides Users with the ability to search for Tasks stored in Customer Engagement.

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 18-5: 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 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 <u>Selection Menu</u> depend upon configuration. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for information about configuring Task types.

- **Status** - Status of the Task. This <u>Selection Menu</u> 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 <u>Selection Menu</u> depend upon configuration. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for information about configuring Task priorities.

- **Location** - Location of the Task. This <u>Selection Menu</u> is populated with Locations.

- **Event** - The Promotion Event associated with the Task. This <u>Selection Menu</u> 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 <u>Matching Rule Menu</u> and <u>Text Field</u>.

- **First Name** - First name of the Customer with whom the Task is associated. Uses a <u>Matching Rule Menu</u> and <u>Text Field</u>.

- **Last Name** - Last name of the Customer with whom the Task is associated. Uses a <u>Matching Rule Menu</u> and <u>Text Field</u>.

Actions Menu

The <u>Actions Menu</u> for the <u>Search Tasks</u> page has the following options:

- **Clear Search** - Remove all information entered into the search criteria fields.

- **Add New Task** - Add a new Task. See <u>Create a Task</u>.
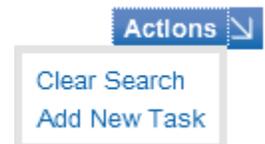
Select Users From Hierarchy

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.
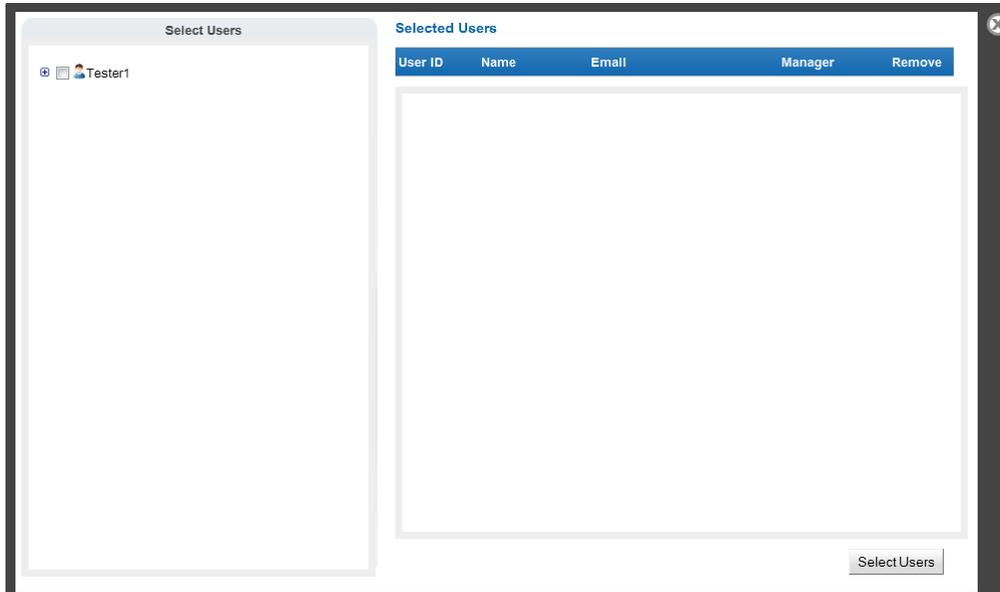
Figure 18-6: Select Users Window

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).
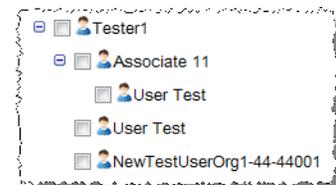
    The User(s) appear in the Selected Users List.
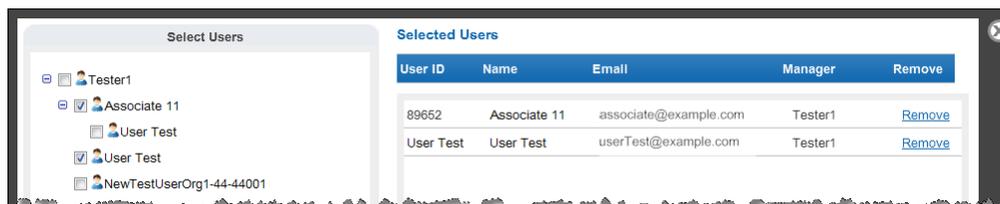
Figure 18-7: Select User Window - Users Selected

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.
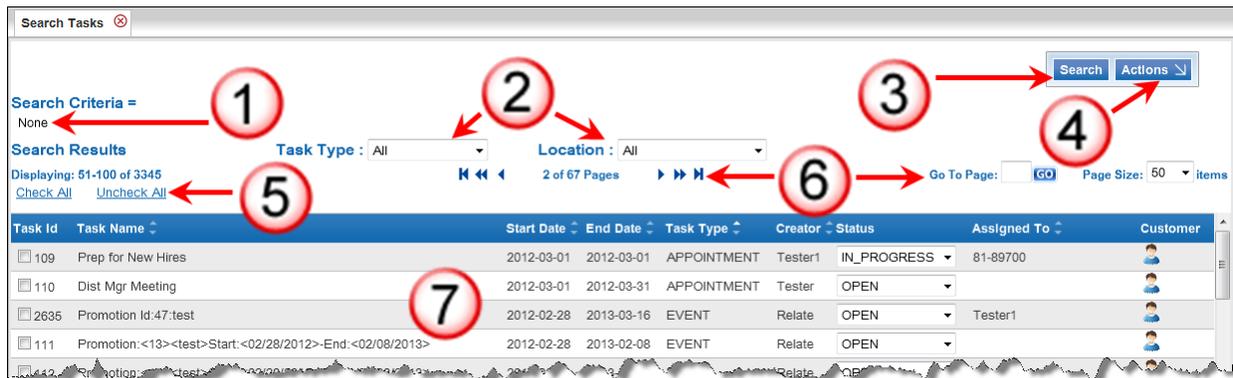
Figure 18-8: Task Search Results Screen

Table 18-2: *Task Search Results Page Key*

Item	Description
	Search Criteria - Displays the search criteria used for the search results displayed in the List.
	Filter Menus - Select criteria in the Filter Menus to view a subset of the Tasks in the Task List. See Filter Menus for more information.
	Search Button - Return to the Search Tasks screen to perform another search.
	Actions Menu - Click to open a menu of actions that can be performed in the Task List page. See Actions Menu for more information.
	Check Options - Links to place or remove a check mark (☑) in each Check Box displayed in the current screen.
	Page Navigation - Page Navigation for the List.

Table 18-2: *Task Search Results Page Key (continued)*

Item	Description
⑦	**Tasks** - A <u>List</u> of Tasks that meet the entered search criteria. The <u>List</u> displays a limited number of Tasks; use the Filter Menu to narrow down the <u>List</u> and locate a certain Task. This <u>List</u> includes the following information for each Task: • **Task Id** - ID of the Task. • **Task Name** - Name of the Task. • **Start Date** - Date on which the Task starts. • **End Date** - Date on which the Task ends. • **Task Type** - Type of Task. • **Creator** - ID of the User who created the Task. • **Status** - Status of the Task. • **Assigned To** - ID of the User to whom the Task is assigned. • **Customer** - Indicates whether the Task is associated with a Customer; if it is, an icon ( ) will appear in this field.

Actions Menu

The <u>Actions Menu</u> for the <u>Task List</u> page has the following options:

- **Add New Task** - Add a new Task. See <u>Create a Task</u>.
- **Re-assign** - Reassign the Task to a different User. See <u>Reassign a Task</u>.

Filter Menus

The Task Search Results <u>List</u> includes the following <u>Filter</u> menus:

Figure 18-9: Filter Menus

- **Task Type** - Filters the <u>List</u> to show only the Tasks with the Task Type selected. The options in this <u>Selection Menu</u> depend upon configuration. To show Tasks of all types, select **All** [DEFAULT]. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for information about configuring Task types.

- **Location** - Filters the <u>List</u> to show only the Tasks for the selected location. To show Tasks for all locations, select **All** [DEFAULT].

Edit Task Window

The Edit Task Window allows Users to view and edit Task information:

Figure 18-10: 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 the *Oracle Retail Customer Engagement Cloud Services Implementation 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.

  Tip: This field can be set using the Duration field.

- **Priority** - The priority assigned to the Task. The options in this <u>Selection Menu</u> depend upon configuration. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for information about configuring Task priorities.

- **Status** - The status of the Task.

- **Duration** - The duration of the Task.

  > **Tip:** 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 18-12 below).

- **Assigned User** - A <u>List</u> of the User(s) assigned to the Task.

Figure 18-11: Assigned User List - APPOINTMENT, EVENT, TODO, MEETING, or TASK

Figure 18-12: 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 <u>Selection Menu</u> is only available for ADMIN Task Types.*

- **Assigned Customer** - A <u>List</u> containing the Customer assigned to the Task. *This <u>List</u> 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).

- **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).

- **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).

- **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).

- **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).

- **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).

- **Add Note** - Add a Note to the Task (see Add a Note).

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 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 18-13: Search User Window

3. Use the Search User Window to enter search information for the User, then click the **Search** button to search for Users matching the search criteria.

    A List of search results is displayed.

Figure 18-14: 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.

> **Important:** Customer Engagement does not ask for confirmation when removing a User assigned to a Task. **The User will be removed as soon as the option is selected.**

Add/Change Customer

To add or change the Customer associated with a Task:

1. Click **Add Customer** or **Change Customer** in the Actions Menu for the Edit Task Window, or the Create a Task screen or Window.

    A Search Customer Window opens.

Figure 18-15: Search Customer Window

2. Use the Search Customer Window to enter search information for the customer, then click the **Search** button to search for Customers matching the search criteria.

    A List of search results is displayed.

Figure 18-16: Search Customer Results

3. Click to select the Customer to associate with the Task.

4. Click the **OK** button to associate the Customer with the Task and close the Search Customer Window, returning to the Create a Task or Open/Edit a Task procedure.

    To close the Window without saving the changes, click the **Cancel** button.

Remove a Customer

To remove a Customer associated with a Task, click **Remove Customer** in the Actions Menu for the Edit Task Window or the Create a Task screen. The Customer is removed.

> **Important:**   Customer Engagement does not ask for confirmation when removing a Customer association from a Task. **The Customer is removed as soon as this option is selected.**

Add a Note

To add a Note to the Task:

1. Click **Add Note** in the Actions Menu for the Edit Task Window or the Create a Task screen.

   An ADD NOTE Window opens.

Figure 18-17: 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 Customer Engagement:

1. Start the procedure from the My Tasks page, the Task List page, or the Tasks Page for a Customer.

   - In the My Tasks page, click the **Add Task** button.

   A Create New Task screen opens.

Figure 18-18: 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 Customer Tasks Page.

A Create New Task Window opens.

Figure 18-19: Create New Task Window

2. Select the **Task Type**. The options in the Selection Menu depend upon configuration. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for information about configuring Task types.

3. Configure the Task. Many of the options available depend upon the Task Type.

- **Start Date** - This Calendar Menu determines the date on which the Task starts.

- **End Date** - This Calendar Menu determines the date on which the Task ends.

- **Subject** - This Text Field contains the subject of the Task.

- **Location** - This Selection Menu determines the Location where the Task is to be performed.

- **Event** - This Selection Menu determines the Promotion associated with the Task. *This field is only enabled for EVENT Task Types.*

- **Creator** - ID of the User who created the Task. *This field cannot be edited.*

- **Start Time** - These Time Menus determine the time at which the Task starts

- **End Time** - These Time Menus determine the time at which the Task ends.

  This field can be set using the Duration field.

- **Priority** - The priority assigned to the Task. *The options in this Selection Menu depend upon configuration.* See the *Oracle Retail Customer Engagement Cloud Services Implementation 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.

Tip: 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). The **Assigned User List** displays the User assigned to the Task.
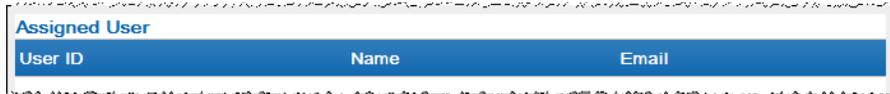
Figure 18-20: Assigned User List - APPOINTMENT, EVENT, TODO, MEETING, or TASK

Figure 18-21: 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). The **Assigned Customer List** displays the Customer assigned to the Task. *This List is only displayed for APPOINTMENT, EVENT, TODO, MEETING, or TASK Task Types.*

Figure 18-22: 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). 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.

19

Process Queue

Overview

In Customer Engagement, the Process Queue displays information about previously run Jobs.

About this Chapter

This chapter contains the following information:

- Process Queue - Describes the Process Queue page, including:
  - Open Job
  - Actions Menu
  - Filter Menus
- Job Details Window - Describes the Job Details 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.
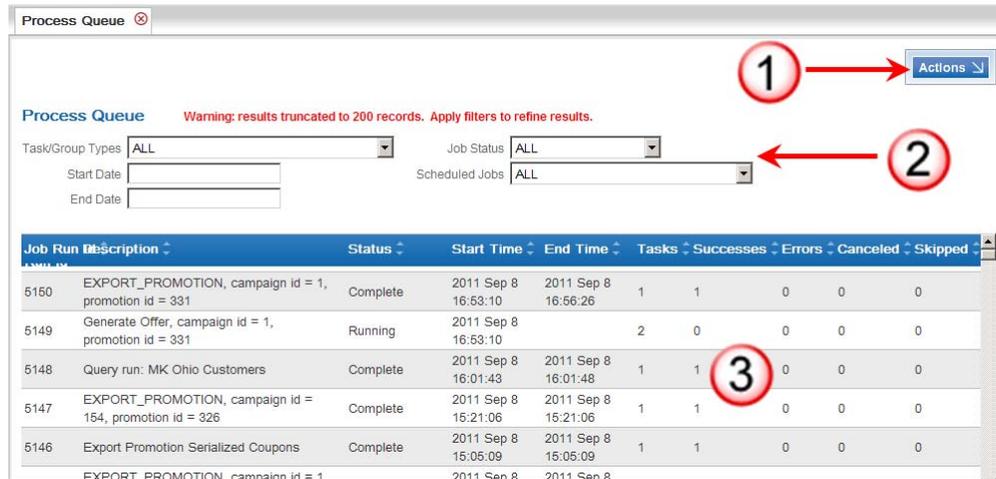
Figure 19-1: Process Queue Page

Table 19-1: *Process Queue Page Key*

Item	Description
	Actions Menu - Click to open a menu of actions that can be performed in the Process Queue page. See Actions Menu for more information.
	Filter Menus - Select criteria in the Filter Menus to view a subset of the Jobs in the Process Queue. See Filter Menus for more information.
	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, possibly because an error occurred in a previous task.

Open Job

To open a Job, click the Job in the <u>List</u>. The Job is displayed in a <u>Job Details Window</u>.

Actions Menu

The <u>Actions Menu</u> for the Process Queue contains the following option:

- **Refresh** - Refreshes the <u>List</u> with the most recent Jobs run by the system.

Filter Menus

The Process Queue displays the following <u>Filter</u> fields:

Figure 19-2: Filter Menus

- **Task/Group Types** - Filters the <u>List</u> by Task Type.

- **Start Date** - A <u>Calendar Menu</u> that sets an initial date for a date range filter.

- **End Date** - A <u>Calendar Menu</u> that sets a final date for a date range filter.

- **Job Status** - Filters the <u>List</u> by the current status of the Job.

- **Scheduled Jobs** - Filters the <u>List</u> to show only the previous runs of a specific Scheduled Job.

- **Max Records** - Filters the <u>List</u> to show only up to the selected number of Jobs.

Job Details Window

The Job Details <u>Window</u> displays information about Job opened in the <u>Window</u>, and provides the ability to view the results of the Job.

Figure 19-3: Job Details Window

The following information is displayed in the Job Details <u>Window</u>:

- **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 <u>List</u> 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 <u>List</u> 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 <u>Link</u> to the export file created by the action.

Tip: To open an Export File from a Job, click the <u>Link</u> for the Export File in the Info table cell. A new browser window opens and the Export File is downloaded.

20

Job Scheduling

Overview

In Customer Engagement, Job Scheduling is used to view and edit Jobs scheduled to be run in Customer Engagement.

About this Chapter

The chapter includes the following information:

- Scheduled Jobs List - Describes the Scheduled Jobs List and the functions available on it, including:
  - Open Scheduled Job
  - Actions Menu
- Scheduled Job Window - Describes the Scheduled Job Window and its functionality, including:
  - Actions Menu
  - Edit Job
  - Disable Job
  - Enable Job
  - Delete Job
  - Run Job Immediately
  - View Job in Process Queue
- Schedule a Job - Provides the procedures for scheduling a Job, including:
  - Job Processing Window
- Jobs and Tasks - Provides a brief summary of each task available for scheduling in each of the following areas:
  - Customer Tasks
  - Associate Assignment Tasks
  - Customer Segment Tasks
  - Account Tasks
  - Award Account Tasks
  - Loyalty Tasks
  - Housekeeping Tasks

- - [OLAP Tasks](#)

  - [Campaign Tasks](#)

  - [Social Network Integration Tasks](#)

  - [Clienteling](#)

  - [Email Notification](#)

- [Configure Job Parameters](#) - Describes the parameters that must be configured for each task for a scheduled 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 20-1: Scheduled Jobs List

Table 20-1: *Job Scheduling Page Key*

Item	Description
	Refresh Button - Click to refresh the list.
	Actions Menu - Click to open a menu of actions that can be performed in the Job Scheduling List page. See Actions Menu for more information.
	Scheduled Jobs List - A List of Jobs that are configured to be run by the system.

The Scheduled Jobs List displays the following information for each Job:

- **ID** - ID Number of the Job.
- **Description** - Description of the Job.
- **Enabled** - Indicates whether the Job is currently enabled.
- **Frequency** - The frequency at which the Job is performed.
- **Next Run Time** - The Time at which the Job will be run next.

Open Scheduled Job

To open a Scheduled Job, click the Job in the List. The Job opens in a Scheduled Job Window.

Actions Menu

The Actions Menu for the Job Scheduling page contains the following option:

- **Create** - Create a new Job Schedule.

Scheduled Job Window

The Scheduled Job Window displays information about Job opened in the Window, and provides the ability to update the Job.
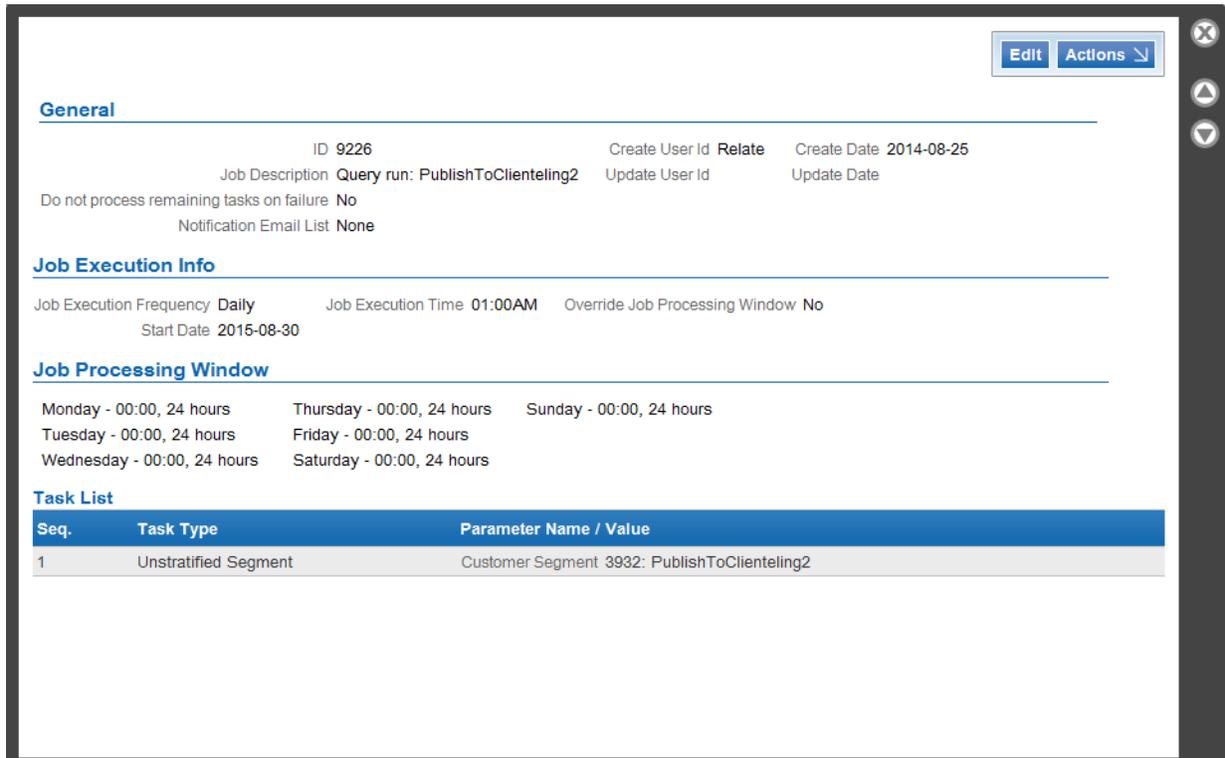
Figure 20-2: Scheduled Job Window

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 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.

• **Enable** - Enable the Job (this option only available if the Job is disabled). See Enable Job.

• **Delete** - Remove the Job from the system. See Delete Job.

• **Run Job Immediately** - Run the Job now, regardless of scheduling. See Run Job Immediately.

• **View Job In Process Queue** - Opens the Process Queue with the Job selected the **Scheduled Jobs** Selection Menu (in the Filter Menus). See page 1 in Chapter 19, "Process Queue" for more information about the Process Queue.
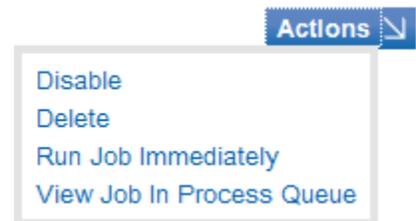
Edit Job

To edit an existing Job opened in a <u>Scheduled Job Window</u>:

1. Click the **Edit** button in the <u>Scheduled Job Window</u>.

   The Job Create <u>Wizard</u> opens with all fields populated with the current configuration information.

2. Use <u>Wizard Navigation</u> to make any necessary changes. See <u>Schedule a Job</u> 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 <u>Scheduled Jobs List</u>.

   - Click **cancel** to delete all changes and return to the <u>Scheduled Jobs List</u>.

Disable Job

Click **Disable** in the <u>Actions Menu</u> to disable a Job opened in a <u>Scheduled Job Window</u>.

After clicking **Disable**, the <u>Scheduled Job Window</u> closes and the Enabled field for the Job is set to False in the <u>Scheduled Jobs List</u>.

> **Note:** There is no confirmation prompt when disabling a job.

Enable Job

Click **Enable** in the <u>Actions Menu</u> to enable a Job opened in a <u>Scheduled Job Window</u>.

After clicking **Enable**, the <u>Scheduled Job Window</u> closes and the Enabled field for the Job is set to True in the <u>Scheduled Jobs List</u>.

> **Note:** There is no confirmation prompt when enabling a job.

Delete Job

Click **Delete** in the <u>Actions Menu</u> to delete a Job opened in a <u>Scheduled Job Window</u>.

After clicking **Delete**, the <u>Scheduled Job Window</u> closes and the Job is deleted from the <u>Scheduled Jobs List</u>.

> **Note:** There is no confirmation prompt when deleting a job.

Run Job Immediately

Click **Run Job Immediately** in the <u>Actions Menu</u> to immediately run a Job opened in a <u>Scheduled Job Window</u>.

After clicking **Run Job Immediately**, the <u>Scheduled Job Window</u> closes and the Job runs in Customer Engagement.

> **Note:** 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](#).

> **Note:** See [page 1 in Chapter 19, "Process Queue"](#) for more information about the actions and options available in the [Process Queue](#).

Schedule a Job

To schedule a Job in Customer Engagement:

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

    The Job Create [Wizard](#) opens with the Job Description step.

Figure 20-3: 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.
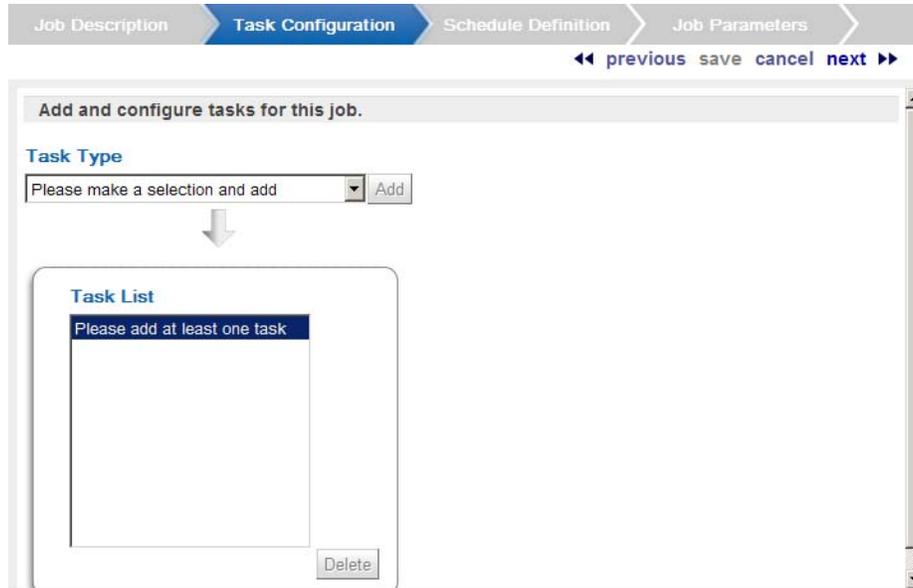
Figure 20-4: Task Configuration Step

4. Configure the Tasks in the Job:

   a. Select a Task in the Task Type Selection Menu. See Jobs and Tasks 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 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 20-5: Schedule Definition Step

6. Define the Schedule on which the Job will run:

   a. Select the Job Execution Frequency. This <u>Selection Menu</u> 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. This option may not be available when the Export Updated Records Only option is selected for the job.

      * **Once, Later** - Run the Job at a later date. This option may not be available when the Export Updated Records Only option is selected for the job.

      * **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** <u>Calendar Menu</u> 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** <u>Calendar Menu</u> 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** <u>Selection Menu</u> 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.

> **Tip:**   It is recommended that you select a time that is within the Job Processing Window. If you select a time outside the Job Processing Window, the Override Job Processing Window setting (see step g) must be checked (☑) for the Job to run.

g.   Use the **Override Job Processing Window** Check Box to indicate whether the Job should run, even if it is scheduled outside the Job Processing Window.

7.   When you have finished, click **next** to continue.

The Job Parameters step opens.
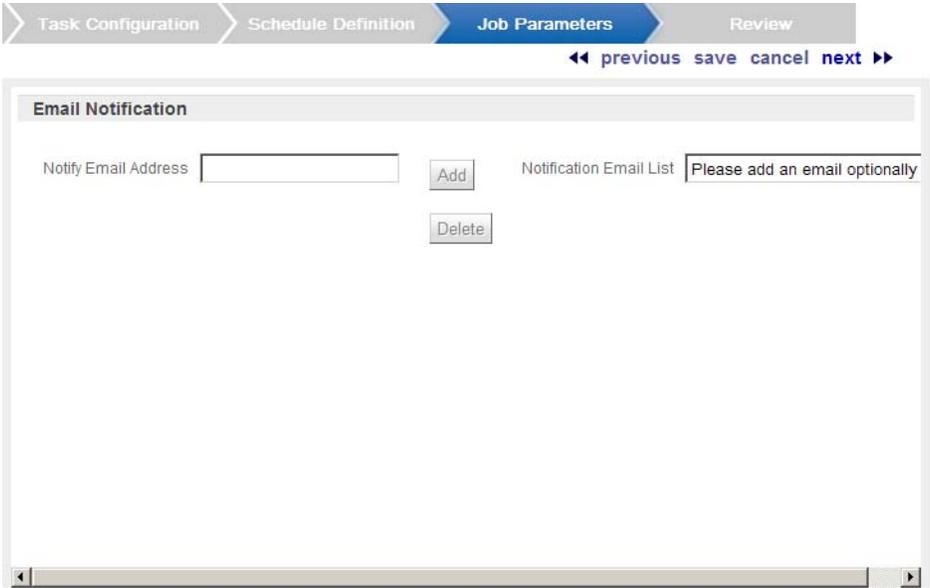
Figure 20-6: Job Parameters Step

8.   Configure the Job Parameters:

a.   If necessary, enter an email address in the **Notify Email Address** field.

Customer Engagement 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.

Job Processing Window
```
Monday - 16:00, 7 hours
Tuesday - 16:00, 7 hours
Wednesday - 16:00, 7 hours
Thursday - 16:00, 7 hours
Friday - 16:00, 7 hours
Saturday - 16:00, 7 hours
Sunday - 16:00, 7 hours
```

Figure 20-7: 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.

> **Note:** Each Job has additional parameters that must be configured. For information about these parameters, see <u>Configure Job Parameters</u>.

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.

See <u>Location Mass Assignment</u> for job scheduling details.

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.

See <u>Duplicate Search</u> for job scheduling details.

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, Customer Engagement 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 <u>Duplicate Search</u>), or in the Customer Merge Review procedure.

See <u>Duplicate Merge</u> for job scheduling details.

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. Only primary home addresses are evaluated.

See Household Identification for job scheduling details.

Home Location Re-Assignment

The Home Location Re-Assignment task changes the Home Locations assigned to Customers.

See Home Location Re-Assignment for job scheduling details.

Franchisee Assignment

The Franchisee Assignment task assigns Franchisees to Customers.

See Franchisee Assignment for job scheduling details.

Customer Sync Export

Creates a file of customer data for export to a marketing system or a business intelligence/analytics system. The data includes the customers name, address, email address, phone number, and additional information.

Depending on the selected batch export type, the export task may also generate a listing of customer records that have been deleted as a result of Customer Housekeeping or Customer Merge, or include deleted customer records in a single customer export file.

See Customer Sync Export for job scheduling details and generated files.

Customer Address Sync Export

Create a file for export to a business intelligence/analytics system. The data includes details on the customer's address.

See Customer Address Sync Export for job scheduling details and the generated address file.

Customer Activity Sync Export

Creates a file for export to a marketing system. The data includes details on customer transactions.

See Customer Activity Sync Export for job scheduling details and generated files.

Customer Attributes Sync Export

Create a file for export to a marketing system or a business intelligence/analytics system. The data includes details on customer attributes.

See Customer Attributes Sync Export for job scheduling details and generated files.

Customer Household Sync Export

Create a file for export to a business intelligence/analytics system. The data includes details on the association of a customer with a household.

See Customer Household Sync Export for job scheduling details and generated files.

Rebuild Category Totals

Recalculate the totals in the CST_DEPARTMENT_TOTALS tables for all customers active within a specified number of days, months, or years, for example: rebuild totals for customers active within the last 4 weeks. The maximum period of time is up to 3 years.

See Rebuild Category Totals for job scheduling details.

BI/Analytics Package Exporter

The BI/Analytics Package Exporter task enables you to package the export files into a zip file for export to the business intelligence/analytics system. This task should be the last task performed for a single job, running after the individual exports.

See BI/Analytics Package Exporter for job scheduling details.

Reset Customer YTD Totals

Resets the YTD totals for all Customers to zero.

See Reset Customer YTD Totals for job scheduling details.

Associate Assignment Tasks

Automated Associate Assignment

This task automatically assigns Associates to Customers, based on a set of selected criteria.

See Automated Associate Assignment for job scheduling details.

Associate Mass Re-assignment

This task automatically reassigns the Customers assigned to a selected Associate to one or more new Associates.

See Associate Mass Re-assignment for job scheduling details.

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.

See Unstratified Segment for job scheduling details.

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.

See Stratified Segment for job scheduling details.

Segment Sync Export

This task generates a CSV file of customers within a stratified, unstratified, or manual segment for export to a marketing system or a business intelligence/analytics system.

See Segment Sync Export for job scheduling details and generated files.

Account Tasks

Points/Awards Transfer Notification Export

This task creates CSV files for notifications about points transfers and/or award transfers. A separate file is generated for each type of transfer, and information is included to notify both the source (originating) Customer for the transfer and the target (recipient) Customer.

The integrated system, such as Responsys, can use the information to generate transfer notification emails to the originator and recipient of the award or points transfer, based on each Customer's Contact Permissions. SMS messages can also be generated if the integrated system supports it.

The Enable Responsys Transfer Notification configuration property controls whether to send the notification in real time, or capture the data in a separate table and generate notifications through a batch export file. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

When interactive notification requests are sent through a web service message, use of the export file occurs only if an interactive request to generate the notification did not succeed. In this case, the details of the transfer are retained in the database until a scheduled notification export job runs.

See Points/Awards Transfer Notifications Export for job scheduling details and generated files. The Marketing Integration Properties chapter of the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* describes the configuration required for transfer notification integration with a marketing system such as Responsys.

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 Customer Engagement-generated Card numbers and the Customer assigned to each Card.

> **Note:** The export file for this type of job is not compressed.

See Export Card Series for job scheduling details and generated files.

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.

See Release Expired PreAuth for job scheduling details.

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.

See Notify Card Renewal for job scheduling details.

Tender Sync Export

This task generates a file of tender accounts and tender account activity for export to an external system.

See [Tender Account Sync](#) for job scheduling details and generated files.

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.

See [Issue Anniversary Awards](#) for job scheduling details.

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.

See [Notify Awards Expire](#) for job scheduling details.

Award Sync Export

This task generates a file of award accounts and a file of award coupons for export to a marketing system.

See [Award Sync Export](#) for job scheduling details and generated files.

Loyalty Tasks

Distribute Loyalty Awards

This task creates an export file for all pending awards.

See [Distribute Loyalty Awards](#) for job scheduling details.

Create Loyalty Awards

This task converts loyalty points into awards, based on the parameters set for the program and program level.

See [Create Loyalty Awards](#) for job scheduling details.

Earn Loyalty Points

This task converts pending (escrow) loyalty points into earned loyalty points.

See [Earn Loyalty Points](#) for job scheduling details.

Expire Loyalty Points

This task expires (deletes) loyalty points based upon parameters in the Program/Level.

See [Expire Loyalty Points](#) for job scheduling details.

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.

See Reset Loyalty YTD Points for job scheduling details.

Loyalty Account Sync Export

This task generates a file of customer loyalty data for export to a marketing system or a BI/analytics system.

See Loyalty Account Sync Export for job scheduling details and generated files.

Loyalty Account Activity Sync Export

This task generates a file of customer loyalty account activity to a BI/analytics system.

See Loyalty Account Activity Sync Export for job scheduling details and generated files.

Loyalty Program Sync Export

This task generates a file of loyalty programs to a BI/analytics system.

See Loyalty Program Sync Export for job scheduling details and generated files.

Loyalty Award Transaction Sync Export

This task generates a file of loyalty award transactions to a BI/analytics system.

See Loyalty Award Transaction Sync Export for job scheduling details and generated files.

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 Award Inquiry Activities

This task deletes old award inquiry activities.

See Delete Award Inquiry Activities for job scheduling details.

Delete Batch Process Tracking

This task deletes old Batch Process Tracking records. Consolidated daily, weekly, and monthly records are stored in XMLAPI record tables in the database, and used to display information at the "Batch Process Tracking" pages.

See Delete Batch Process Tracking for job scheduling details.

Delete Customers

The Delete Customers task removes old Customer records that are no longer needed.

See Delete Customers for job scheduling details.

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.

See [Delete Gift Registries](#) for job scheduling details.

Delete Inactive Customer Addresses

This task deletes Customer addresses that are flagged as inactive.

See [Delete Inactive Customer Addresses](#) for job scheduling details.

Delete Inactive Customer Email Addresses

This task deletes Customer email addresses that are flagged as inactive.

See [Delete Inactive Customer Email Addresses](#) for job scheduling details.

Delete Inactive Customer Phone Numbers

This task deletes Customer phone numbers that are flagged as inactive.

See [Delete Inactive Customer Phone Numbers](#) for job scheduling details.

Delete Inactive Customers

This task deletes old Customer records that are inactive.

See [Delete Inactive Customers](#) for job scheduling details.

Delete Inactive Item Registries

This task deletes all database information for inactive Wish Lists that have not been updated within a certain, defined period of time.

See [Delete Inactive Item Registries](#) for job scheduling details.

Delete Job History

This task deletes old job history information.

See [Delete Job History](#) for job scheduling details.

Delete Loyalty Accounts and Activities

This task deletes old loyalty accounts and activities.

See [Delete Loyalty Accounts and Activities](#) for job scheduling details.

Delete Loyalty Inquiry Activities

This task deletes old loyalty inquiry activities.

See [Delete Loyalty Inquiry Activities](#) for job scheduling details.

Delete Merged/Archived Customers

This task deletes old Customer records that have been merged into other Customer records and archived.

See [Delete Merged/Archived Customers](#) for job scheduling details.

Delete Promotion

This task deletes old promotions.

See [Delete Promotion](#) for job scheduling details.

Delete Segment History

This task deletes old segment history information.

See [Delete Segment History](#) for job scheduling details.

Delete Segments

This task deletes old segments.

See [Delete Segments](#) for job scheduling details.

Delete Social Activities

This task deletes all social activities from the database that were posted before a certain number of days in the past.

See [Delete Social Activity](#) for job scheduling details.

Delete Stored Files

This task deletes old transfer files.

See [Delete Stored Files](#) for job scheduling details.

Delete Transaction History

This task deletes old transaction information.

See [Delete Transaction History](#) for job scheduling details.

Delete Web Service Tracking

This task deletes old Web Service Tracking records.

See [Delete Web Service Tracking](#) for job scheduling details.

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.

See [Aggregate Loyalty Facts](#) for job scheduling details.

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.

See [Aggregate Tender Facts](#) for job scheduling details.

Campaign Tasks

Dynamic Promotions

This task updates the Targets for all dynamic Promotions.

See [Dynamic Promotions](#) for job scheduling details.

Promotion Response Data Import

This task imports customer event data from a marketing system such as Responsys.

See [Promotion Response Data Import](#) for job scheduling details and import file formats.

Social Network Integration Tasks

Social Network Listener

This task searches social networks for Customer posts that meet search criteria defined by Social Listeners.

See [Social Network Listener](#) for job scheduling details.

Social Network Update

This task checks for new Social Profiles to add to Customer records.

See [Social Network Update](#) for job scheduling details.

Clienteling

Task Generator

Generate tasks for Segments with Task Generation enabled. See [page 1 in Chapter 6, "Segments"](#).

See [Task Generator](#) for job scheduling details.

Email Notification

File Transmission Activity Email Notification

Generate an email notification summarizing receipt of file imports. The email contents are similar to the information displayed at the Batch Import Review screens. See the *Customer Engagement Batch Processing and Web Services Guide* for more information.

See [File Transmission Activity Email Notification](#) for job scheduling details.

Configure Job Parameters

The parameters that must be configured for a given task depend upon the task being defined.

> **Note:** For a description of processes performed by these Jobs, see Jobs and Tasks.

The following sections describe the fields that configure each task:

Customer Tasks

- Location Mass Assignment
- Duplicate Search
- Duplicate Merge
- Household Identification
- Home Location Re-Assignment
- Franchisee Assignment
- Customer Sync Export
- Customer Address Sync Export
- Customer Activity Sync Export
- Customer Attributes Sync Export
- Customer Household Sync Export
- Rebuild Category Totals
- BI/Analytics Package Exporter
- Reset Customer YTD Totals

Associate Assignment Tasks

- Automated Associate Assignment
- Associate Mass Re-assignment

Customer Segment Tasks

- Unstratified Segment
- Stratified Segment
- Segment Sync Export

Account Tasks

- Points/Awards Transfer Notifications Export
- Export Card Series
- Release Expired PreAuth
- Notify Card Renewal
- Tender Account Sync

Award Account Tasks

- Issue Anniversary Awards
- Notify Awards Expire
- Award Sync Export

Loyalty Tasks

- Distribute Loyalty Awards
- Create Loyalty Awards
- Earn Loyalty Points
- Expire Loyalty Points
- Reset Loyalty YTD Points
- Loyalty Account Sync Export
- Loyalty Account Activity Sync Export
- Loyalty Program Sync Export
- Loyalty Award Transaction Sync Export

Housekeeping Tasks

- Delete Customers
- Delete Inactive Customers
- Delete Inactive Customer Addresses
- Delete Inactive Customer Phone Numbers
- Delete Inactive Customer Email Addresses
- Delete Transaction History
- Delete Promotion
- Delete Merged/Archived Customers
- Delete Loyalty Accounts and Activities
- Delete Loyalty Inquiry Activities

Housekeeping Tasks (cont'd)

- Delete Segments
- Delete Segment History
- Delete Job History
- Delete Gift Registries
- Delete Inactive Item Registries
- Delete Social Activity
- Delete Award Inquiry Activities
- Delete Web Service Tracking
- Delete Batch Process Tracking
- Delete Stored Files

OLAP Tasks

- Aggregate Loyalty Facts
- Aggregate Tender Facts

Campaign

- Dynamic Promotions
- Promotion Response Data Import

Social Network Integration

- Social Network Listener
- Social Network Update

Clienteling

- Task Generator

Email

- File Transmission Activity Email Notification

Location Mass Assignment

This Task has the following parameters:

Figure 20-8: 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 20-9: Duplicate Search Parameters

- **Search Strategy** - This Selection Menu determines the strategy used to search for duplicate Customers. See Search Strategy Field Comparisons 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 for more information). If the Check Box is unchecked,

Customer Engagement 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.

	Search Strategy			
Field	**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
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:
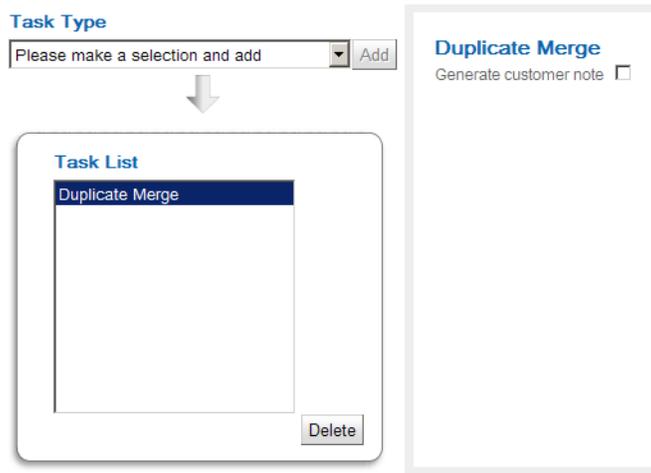
Figure 20-10: Duplicate Merge Parameters

- **Generate customer note** - This <u>Check Box</u> determines whether a Customer note will be generated when duplicate Customers are merged.

Merge Behavior

> **Note:** 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 System Configuration. See the *Customer Engagement Implementation 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

Category	Comes From...
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
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 20-11: 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.

    Business addresses are not evaluated.

- **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 for more information). If the Check Box is unchecked, Customer Engagement will look at all addresses and names.

- **Reset Prior Run Data** - This Check Box determines how existing Households will be treated by the Task.

  - **Checked (☑)** - Existing Households will be ignored and the Households will be created anew each time the Task runs.

  - **Unchecked (☐)** - **[DEFAULT]** Existing Households will be kept in place.

Home Location Re-Assignment

This task has the following parameters:

Figure 20-12: 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 20-13: 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 20-14: 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) <u>Window</u> opens.

Figure 20-15: Search Franchisee(s) Window

2) Select the **Franchisee** in <u>Selection Menu</u>.

3) Click the **OK** button.

The Search Franchisee(s) <u>Window</u> 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** <u>Link</u>.

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 <u>Selection Menu</u>.

Customer Sync Export

Before you submit this task, you must select an export target system of either Marketing for a system such as Responsys, or BI/Analytics for a system such as Retail Insights. The Supported Batch Exporter Types property controls which of these options are available.

See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

Figure 20-16: Customer Sync Export Parameters - Select export target system

Customer Sync Export - Marketing

If you select an export target system of Marketing, the following options are displayed:

Figure 20-17: Customer Sync Export Parameters - Marketing

With a selection of Marketing as the export target system, this task has the following parameters:

- **Export type** - Controls which records to include in the export file:

  - Export all active records - Include all active customer records with email addresses.

  - Export updated records only - Include customer records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

    > **Note:** Regardless of your selection here, the first time you run the export all active customer records are included.

- **Specify export filename** - These fields control the creation of the CSV file containing new or updated customer records.

  At least one entry (prefix, static name, or suffix) is required:

  - **Prefix** - The date and time stamp format to use as a prefix for naming the export file.

    * no prefix - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  The setting of the Responsys Export Filename Default Prefix property defaults.

  - **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Sync Default Filename property defaults.

  - **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

  - **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

- **Specify "deletes" export filename** - These fields control the creation of the CSV file listing the customer IDs of customer records that have been deleted through a housekeeping job or a customer merge since the last time you ran the export. At least one entry (prefix, static name, or suffix) is required.

  - **Prefix** - The date and time stamp format to use as a prefix for naming the "deletes" export file:

    * no prefix - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

> * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

The setting of the Responsys Export Filename Default Prefix property defaults.

- **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Deletes Sync Default Filename property defaults.

- **Suffix** - The date and time stamp format to use as a suffix for naming the "deletes" export file. The date and time stamp format options for the suffix are the same as for the prefix, described above, with a default of no suffix. The setting of the Responsys Export Filename Default Suffix property defaults.

• **Filename** - Displays an example of the "deletes" export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

Customer Export File - Marketing

The customer export file is a comma-separated values file containing the following information:

• Customer ID and home store code.

• Customer name, including salutation, first name, second first name, middle name, last name, second last name, and suffix.

• Active flag (set to 1 if active).

• Primary address, including address lines 1 through 4, city, state, postal code, and country code.

• Primary email address, including email type code.

• Primary phone number, including phone type code.

• Customer's mail, email, and phone contact flags, set to 1 if selected and 0 if unselected.

Only customer records with email addresses are included in the export.

Customer "Delete" Export File - Marketing

The customer export file is a comma-separated values file containing the customer ID of each deleted customer, and the active flag setting of 0.

Customer Sync Export - BI/Analytics

If you select an export target system of BI/Analytics, the following options are displayed:

Figure 20-18: Customer Sync Export Parameters - BI/Analytics

With a selection of BI/Analytics as the export target system, this task has the following parameters:

- **Export type** - Controls which records to include in the export file:

  - Export all active records - Include all active customer records.

  - Export updated records only - Include customer records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

    Note: Regardless of your selection here, the first time you run the export all active customer records are included.

- **Specify export filename** - If you selected an Export type of BI/Analytics, the setting of the Retail Insights Customer Sync Default Filename property is displayed and cannot be changed.

Customer Export File - BI/Analytics

The customer export file is a pipe-delimited values file that typically contains the following information:

- Customer ID.

- Postal code.

- City.

- State.

- Country.

- Active flag for the customer.

- Prospect flag indicating if the customer is a prospect.

- Gender.

- Ethnicity.

- Marital status.

- Educational level.

- Effective date for the address.

- Annual income.

- Contact flag setting.

- Organization name, if the customer is an organization.

- Date when customer was added to the system.

- Flag indicating if the customer is an organization.

- Phone contact flag setting.

- Email contact flag setting.

- Fax contact flag setting.

- Mail contact flag setting.

- Birth month.

- Birth date.

The export file does not include a header row. Instead, there is a separate file with the same name as the customer sync export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the customer sync export file name is W_PARTY_PER_DS.dat, the file containing the header row names is W_PARTY_PER_DS.ctx.

Any customers that have been deleted are included in the customer export file. The only information included for deleted customers is the customer ID, active flag, prospect flag, call flag, delete flag, organization flag, and the contact flag settings.

Customer Address Sync Export
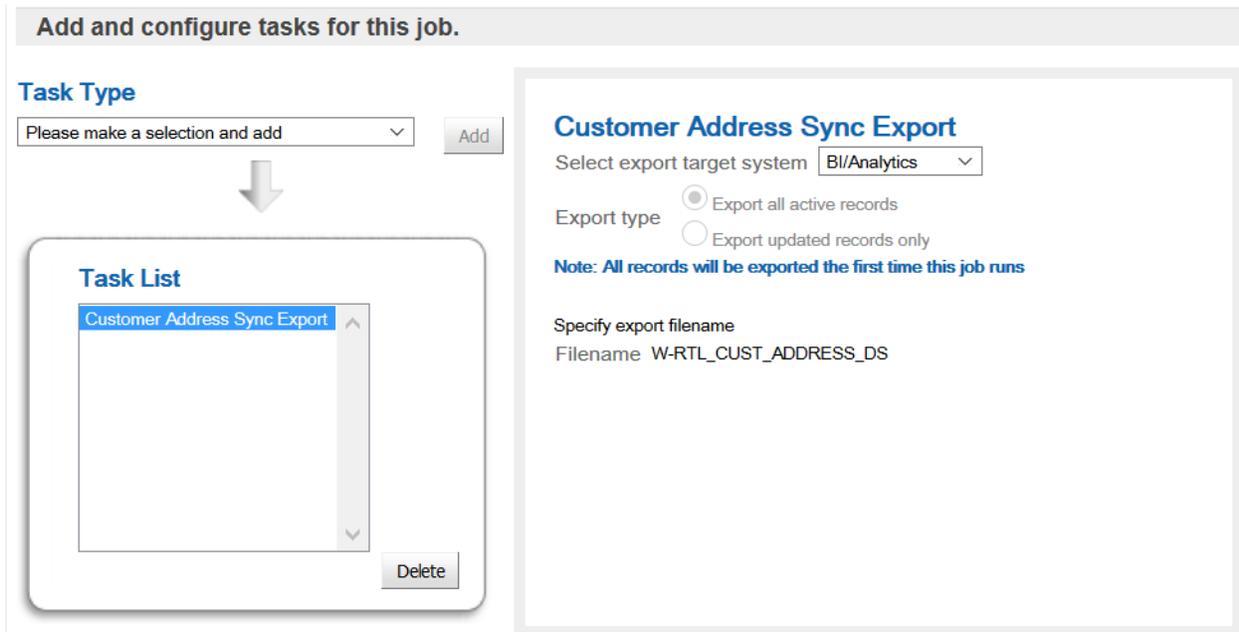
This task has the following parameters:

Figure 20-19: Customer Address Sync Export

- **Batch Exporter Type** - Defaults to BI/Analytics and cannot be changed.

- **Export type** - Defaults to Export all active records and cannot be changed.

- **Specify export filename** - The setting of the Retail Insights Customer Activities Sync Default Filename property is displayed and cannot be changed.

Customer Address Export File - BI/Analytics

The customer address export file is pipe-delimited, and typically contains the following information:

- Customer ID.

- Sequence number identifying the order in which the customer's addresses were added to the database.

- Primary address flag setting.

- Date when the address became effective.

- Date when the address expired.

- First, second, and third lines of the customer's street address.

- City.

- State.

- Country.

- Postal code.

The export file does not include a header row. Instead, there is a separate file with the same name as the customer address export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the customer address

export file name is W_RTL_CUST_ADDRESS_DS.dat, the file containing the header row names is W_RTL_CUST_ADDRESS_DS.dat.ctx.

Customer Activity Sync Export

This task has the following parameters:

Figure 20-20: Customer Activity Sync Export Parameters

- **Select target batch exporter system** - Select Marketing.

- **Export type** - Controls which records to include in the export file:

  - Export all active records - Include activity for all active customer records.

  - Export updated records only - Include activity for customer records only if the activity occurred since the last export With this selection, the Once Immediately and Once Later options for scheduling the job are not available.

    Note: Regardless of your selection here, the first time you run the export, activity for all active customer records is included.

- **Specify export filename** - These fields are displayed only if you selected an Export type of Marketing, and control the creation of the CSV file containing new or updated customer records.

  At least one entry (prefix, static name, or suffix) is required:

  - **Prefix** - The date and time stamp format to use as a prefix for naming the export file:

    * no prefix - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20170830_123456 where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2017-08-30-123456, where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

The setting of the Responsys Export Filename Default Prefix property defaults.

- **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Activities Sync Default Filename property defaults.

- **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

- **Filename** - Displays an example of the export file name with the prefix and suffix format, if any.

Customer Activity Export File

The customer activity export file contains the following information for each transaction it includes:

- Customer ID.

- Year when the activity occurred.

- Item hierarchy levels 1, 2, and 3; for example, this might be DEPT, SUB_DEPT, and CLASS, with the Hierarchy ID for each level indicated for each record. The level is 0 if there is no hierarchy definition for that level.

- The total count of the item for the activity. The count is 0 if the activity did not involve an item quantity.

- The monetary value of the activity, based on the price of the item. Includes up to two decimal positions if the amount is not a whole number.

- The code identifying the location, if any, associated with the activity. Blank if the activity was not associated with a location.

- The latest business date when the activity occurred.

- The latest business date when the activity was updated.

Customer Attributes Sync Export

This task has the following parameters:

Figure 20-21: Customer Attributes Sync Export - Batch Exporter Type

- **Batch Exporter Type** - Select either Marketing or BI/Analytics.

Customer Attributes Sync Export - Marketing

If you select a Batch Exporter Type of Marketing, complete the following parameters:

Figure 20-22: Customer Attributes Sync Export - Marketing

- **Specify export filename** - These fields control the creation of the CSV file containing new or updated customer attribute records. At least one entry (prefix, static name, or suffix) is required:

- **Prefix** - The date and time stamp format to use as a prefix for naming the export file:

  * no prefix - Do not use a date and time stamp prefix on the file name.

  * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  The setting of the Responsys Export Filename Default Prefix property defaults.

- **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Customer Attributes Sync Default Filename property defaults.

- **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

- **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

- **Seq** and **Attribute** - Use the dropdown list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access flags selected are available for selection from the dropdown.

Customer Attribute Export File - Marketing

The customer attribute export file is comma-separated, and typically contains the following information:

- Customer ID.

- Customer primary email address.

- A column for each attribute selected for inclusion in the export file, and the current setting of that attribute for the customer.

The file includes a header row with the name of each column. The column for each attribute is indicated by the attribute name and ID.

Customer Attributes Sync Export - BI/Analytics

If you select a Batch Exporter Type of BI/Analytics, complete the following parameters:

Figure 20-23: Customer Attributes Sync Export - BI/Analytics

- **Customer Attributes Filename** - The setting of the Retail Insights Customer Attributes Sync Default Filename property is displayed and cannot be changed.

- **Attribute Metadata Filename** - The setting of the Retail Insights Attribute Metadata Sync Default Filename property is displayed and cannot be changed.

- **Seq** and **Attribute** - Use the dropdown list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access flags selected are available for selection from the dropdown. Select from the following types of attributes:

  - Varchar Type Attribute - The Retail Insights Varchar Type Attribute Allowed Count property controls the number of varchar type attributes you can select for export.

  - Numeric Type Attribute - The Retail Insights Numeric Type Attribute Allowed Count property controls the number of numeric type attributes you can select for export.

  - Data Type Attribute - The Retail Insights Date Type Attribute Allowed Count property controls the number of data type attributes you can select for export.

Customer Attribute Metadata Export File - BI/Analytics

The customer attribute export metadata file is pipe-delimited, and indicates how to map the Customer Attribute data from Customer Engagement to the target BI/Analytics system.

For example, a record in the metadata file might be:

```
RING_SIZE|CE|PARTY_ATTR1_NAME|W_PARTY_ATTR_DS|Customer Ring
Size|VARCHAR|1|RING_SIZE~CE~PARTY_ATTR1_NAME~W_PARTY_ATTR_DS|
```

Where:

- RING_SIZE = The attribute's Name, from the DTV_ATTRIBUTE_TYPE table
- CE = Hard-coded to CE
- A physical column name such as:
  - PARTY_ATTR[N]_NUM_VALUE = the [N] numeric attribute passed, or
  - PARTY_ATTR[N]_NAME_VALUE = the [N] name attribute passed, or
  - PARTY_ATTR[N]_DATE_VALUE = the [N] date attribute passed

  Where:
  - PARTY_ATTR is hard-coded
  - [N] indicates the column number for that datatype, and
  - VALUE is the type of column (NUMBER, NAME, or DATE)

  Since there can be multiple attributes of the same data type passed, such as two date attributes, it is necessary to number the attributes with the same data type.
- W_PARTY_ATTR_DS = the target table in the BI/Analytics system
- Customer's Ring Size = the attribute's Description, from the DTV_ATTRIBUTE_TYPE table
- VARCHAR = the data type of the attribute in the BI/Analytics system; displayed as Character at the Attribute Definition list page
- 1 = Hard-coded to 1
- RING_SIZE~CE~PARTY_ATTR1_NAME~W_PARTY_ATTR_DS = concatenation of the attribute name + CE + ~ + the physical column name + ~ + the target table name

The metadata file name is from the Retail Insights Customer Attribute Metadata Batch Exporter Templates property.

When you use the [BI/Analytics Package Exporter](#) to create a zip file containing the files for export to the BI/Analytics system, the attribute metadata file is merged with the metadata file from the [Segment Sync Export](#).

Customer Attribute Export File - BI/Analytics

The customer attribute export file is pipe-delimited, and typically contains the following information:

- Customer ID.
- Category hard-coded to RETAIL
- Supplier flag hard-coded to N.
- Attribute value setting.

A column for each attribute selected for inclusion in the export file, and the current setting of that attribute for the customer.

The export file does not include a header row. Instead, there is a separate file with the same name as the customer attribute export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the customer attribute export file name is W_RTL_PARTY_PER_ATTR_DS.dat, the file containing the header row names is W_RTL_PARTY_PER_ATTR_DS.dat.ctx.

Customer Household Sync Export

This task has the following parameters:

Figure 20-24: Customer Household Sync Export

- **Batch Exporter Type** - Defaults to BI/Analytics and cannot be changed.

- **Export type** - Defaults to Export all active records and cannot be changed.

- **Specify export filename** - The setting of the Retail Insights Household Sync Default Filename property is displayed and cannot be changed.

- **Specify customer-household association export filename:** The setting of the Retail Insights Household Customer Association Sync Default Filename is displayed and cannot be changed.

Household Export File - BI/Analytics

The household export file is pipe-delimited, and typically contains the unique identifier for each household, as well as some hard-coded fields that are required by the BI/Analytics system.

The export file does not include a header row. Instead, there is a separate file with the same name as the household sync export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the household sync export file name is W_HOUSEHOLD_DS.dat, the file containing the header row names is W_HOUSEHOLD_DS.dat.ctx.

Household Customer Association Export File - BI/Analytics

The household customer association export file is pipe-delimited, and typically contains the unique identifier for each household and the customer ID for each customer associated with the household. It also typically contains some hard-coded fields that are required by the BI/Analytics system.

The export file does not include a header row. Instead, there is a separate file with the same name as the household customer association file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the household

customer association export file name is W_RTL_CUST_HOUSEHOLD_DS.dat, the file containing the header row names is W_RTL_CUST_HOUSEHOLD_DS.dat.ctx.

The information in these files is formatted as binary data.

Rebuild Category Totals

This task has the following parameters:

Figure 20-25: Rebuild Category Totals

Customer Department Totals Rebuild Period:

- Select whether to recalculate totals based on activity within the most recent number of days, months, or years.

- Enter the number of days, months, or years to include. You can enter a maximum of 3 years, 36 months, or 1095 days.

Before you can submit the job, you need to acknowledge the warning at the bottom area of the Review step, indicating that the task will recalculate customer department totals, and that this step cannot be undone.

Figure 20-26: Rebuild Category Totals Warning

When the job runs, the records in the CST_DEPARTMENT_TOTALS table are cleared for all Customer activity during the specified rebuild period, and then rebuilt. The CREATE_DATE is set to the date when the job is run, and the CREATE_USER is set to ORCE. Return transactions are not included in the category totals.

BI/Analytics Package Exporter

This task has no additional parameters.

Figure 20-27: BI/Analytics Package Exporter

This task packages the export files to the BI/Analytics system, and must be the last task in a single job that includes all other exports to the BI/Analytics system, as in the following example.
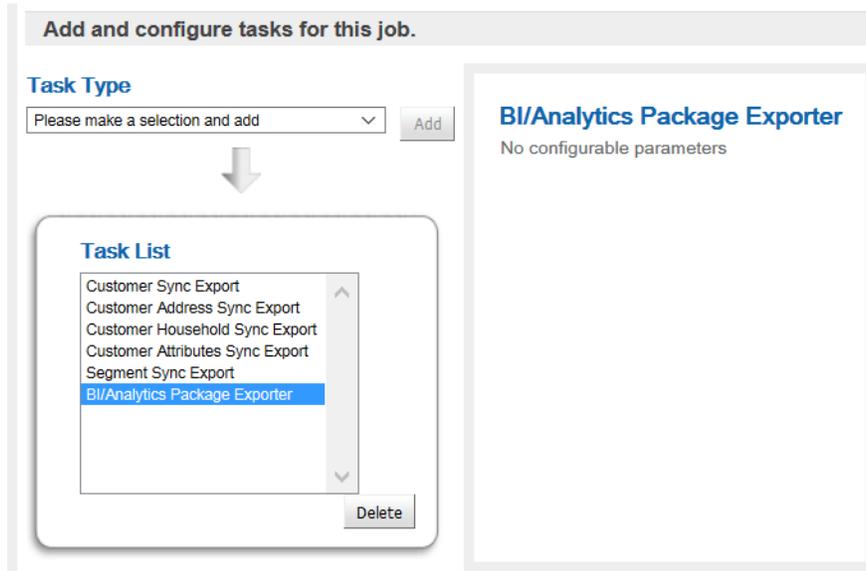
Figure 20-28: BI/Analytics Package Exporter - Last Task in Job Definition

The package exporter creates a zip file that includes the export files from the sync tasks run within the job, so that the zip file is ready for the BI/Analytics system.

The zip file name is from the Retail Insights Zip Package Default Filename property.

For more information on the export tasks and the generated export files, see Customer Sync Export, Customer Address Sync Export, Customer Attributes Sync Export, Customer Household Sync Export, and Segment Sync Export.

Reset Customer YTD Totals

This task has the following parameters:
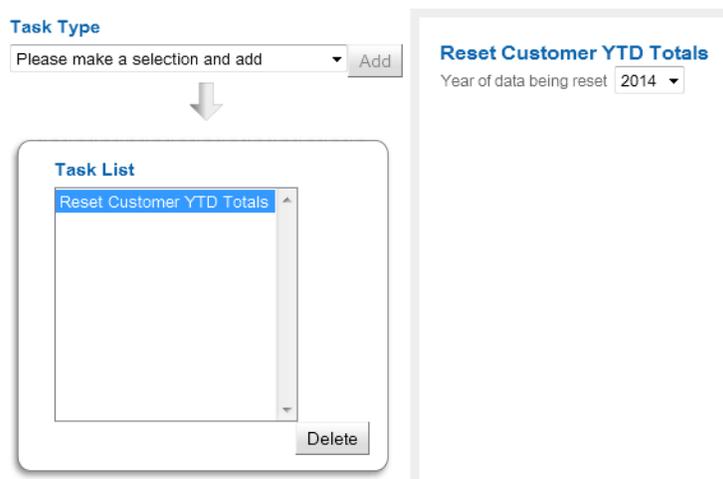
Figure 20-29: Reset Customer YTD Totals Parameters

- **Year of data being reset** - This Selection Menu determines the year for which the YTD data will be reset.

Automated Associate Assignment

This task has the following parameters:

Figure 20-30: Automated Associate Assignment Parameters

- **Date Range Type** - This Selection Menu determines the Date Range used.

- **Start Date** - This Calendar Menu determines the first date of the Date Range (only available if Date Range Type is set to **Specific Date Range**).

- **End Date** - This Calendar Menu determines the final date of the Date Range (only available if Date Range Type is set to **Specific Date Range**).

- **Assignment Method** - These Radio Buttons determine the selection method used to assign an Associate to a Customer. These Radio Buttons have the following options:

  - **Sold most frequently** - The Associate who performed the most sales to each Customer.

  - **Sold largest total amount** - The Associate who sold the largest total amount to each Customer.

- **Assignment Interval** - Number of days between Associate reassignments for a Customer. After the Job assigns an Associate to a Customer, this is the number of days the Job will wait before changing that assignment.

- **Assignment Role** - This Selection Menu determines the Associate Role used for the Associate assignment.

- **Criteria specification** - Additional criteria to use when assigning the Associate. This Selection Menu has the following options:

  - **No additional criteria** - This Job will not require any additional criteria.

  - **Select criteria from list** - Add Item or Location criteria to the Job. A transaction must match one of the entered criteria to be used in determining the Associate to be assigned to the Customer.

Figure 20-31: Select Criteria from List

       *   Click **Add Item Criteria** to use an [Item Eligibility](#) rule in the Job. See [Add Item Eligibility Rule (Simple)](#) for more information.

       *   Click **Add Location Criteria** to use a [Location Eligibility](#) rule in the Job. See [Add Location Eligibility Rule](#) for more information.

Associate Mass Re-assignment

This task has the following parameters:

Figure 20-32: 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**.

Note: 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.

Change/Add Associate

To change or add an Associate:

1. Click the **Click here to select** Link.

   A Search Associate Window opens.

   Figure 20-33: Search Associate Window

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

   A List is populated with Associates for the location.
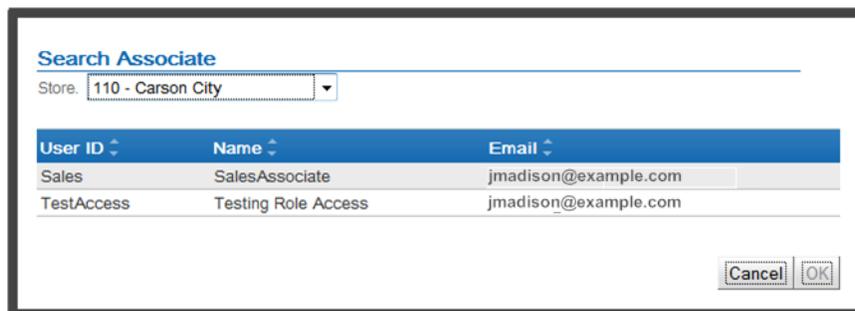
   Figure 20-34: Search Associate Window - Location Selected

   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 Customer Engagement returns to the Task Configuration step.

Unstratified Segment

This Task has the following parameter:

Figure 20-35: Unstratified Segment Parameters

- **Customer Segment** - This <u>Selection Menu</u> determines the Unstratified Segment that will be counted.

Stratified Segment

This Task has the following parameter:

Figure 20-36: Stratified Segment Parameters

- **Customer Segment** - This <u>Selection Menu</u> determines the Stratified Segment that will be organized and counted.

Segment Sync Export

Before you submit this task, you must select an export target system of either Marketing for a system such as Responsys, or BI/Analytics for a system such as Retail Insights. The Supported Batch Exporter Types property controls which of these options are available.

See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.
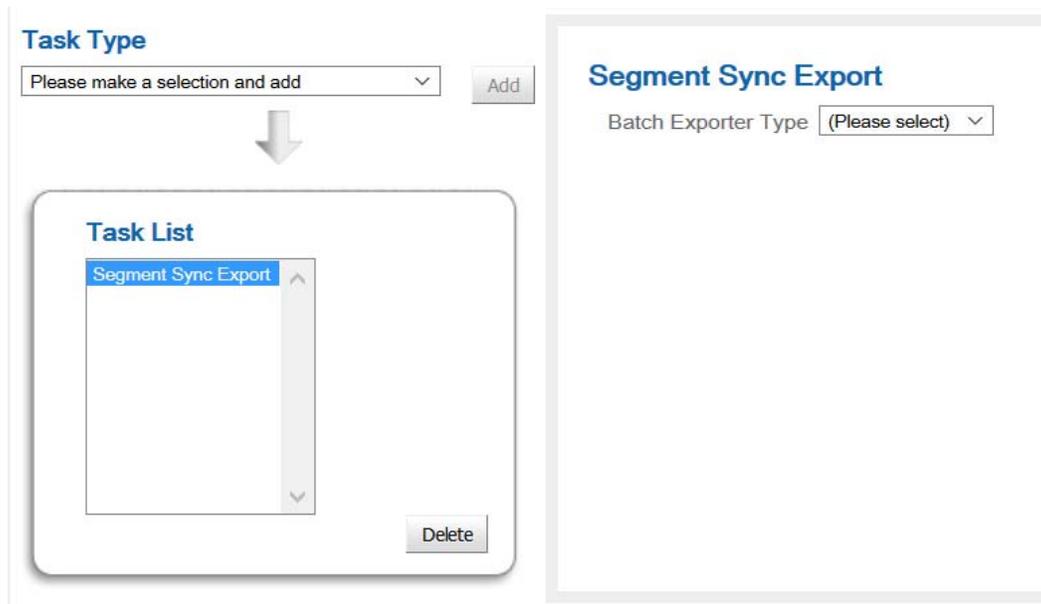
Figure 20-37: Segment Sync Export - Batch Exporter Type

Segment Sync Export - Marketing

If you select an export target system of Marketing, the following options are displayed:
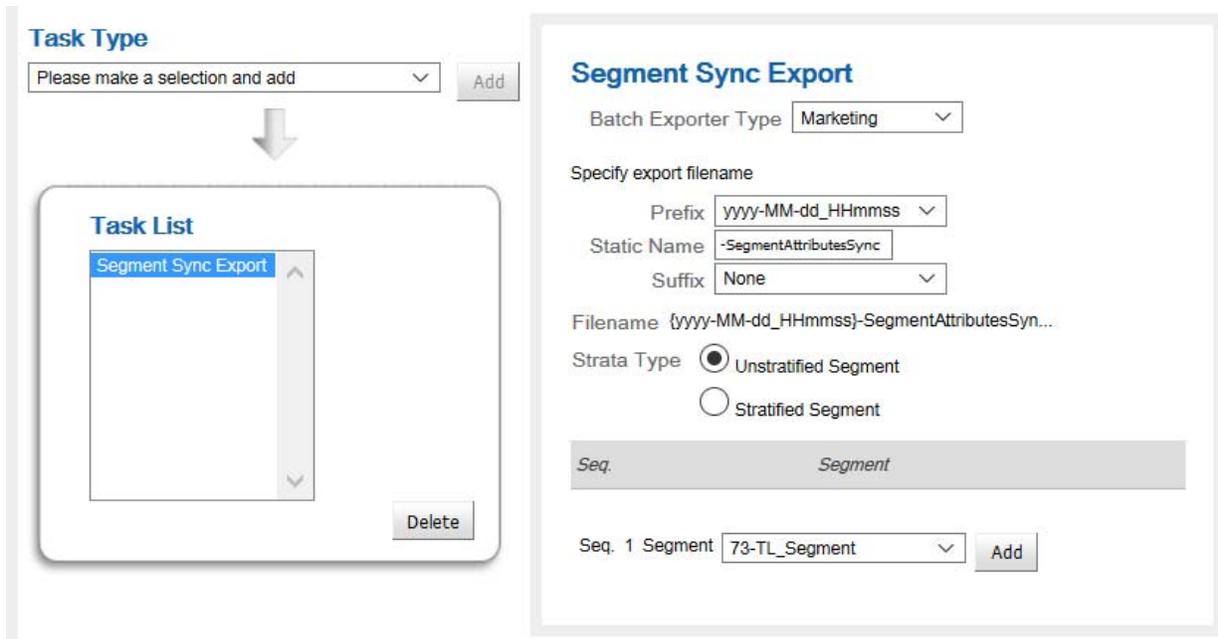
Figure 20-38: Segment Sync Export - Marketing

- **Specify export filename** - These fields control the creation of the CSV file containing new or updated segment records. At least one entry (prefix, static name, or suffix) is required:

- **Prefix** - The date and time stamp format to use as a prefix for naming the export file:

    * no prefix - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  The setting of the Responsys Export Filename Default Prefix property defaults.

- **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Segment Sync Default Filename defaults.

  You can include multiple segments in the same task. However, if you include multiple segment sync tasks to Marketing in the same job, you need to specify a unique static name for each to avoid overwriting one export sync file with another.

- **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

- **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

• **Strata Type** - Defines the type of Segments that can be included in the export file:

- Unstratified Segment - Unstratified Segments and Manual Segments are available for selection in the dropdown list.

- Stratified Segment - Stratified Segments are available for selection in the dropdown list.

  Note: A single Job Definition can include either Unstratified/Manual Segments or Stratified Segments, but not both. If you have selected one or more Segments and then change the setting of the Strata Type, the previously selected Segments are cleared from the listing for the Job Definition.

• **Seq N Segment** = Use the dropdown list to select each Segment to include in the export file. Only Segments that have the Publish To Batch Exporter flag selected and that match the selected **Strata Type** are available for selection from the dropdown. As you select each Segment, it is added to the **Seq.** and **Attribute** listing between the Strata Type and the Seq N Segment dropdown.

• **Seq** and **Attribute** - Use the dropdown list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access flags selected are available for selection from the dropdown.

Customer Segment File for Marketing: Stratified Segments

The customer segment export file for one or more stratified segments contains the following information:

- Customer ID.

- Customer primary email address.

- For each Segment included in the Job Definition:

    * A column with a setting of 1 if the customer is included in the Segment, or a setting of 0 if the customer is not included in the Segment.

    * The Segment stratification format (RANGE or NTILE).

    * The Segment strata type (Customer, Loyalty, or Transaction).

    * The data that the strata is based on (Customer for a Customer strata type; Loyalty Summary or Loyalty Detail for a Loyalty strata type; Header or Detail for a Transaction strata type).

    * The field to stratify on. See the Create Stratified Segment of the Segments chapter for a list of possible fields based on the selected strata type.

    * The strata ID.

    * The strata value.

Customer Segment Export File for Marketing: Unstratified Segments

The customer segment export file for one or more unstratified or manual segments contains the following information:

- Customer ID.

- Customer primary email address.

- Segment name.

- A column for each Segment included in the Job Definition, with a setting of 1 if the customer is included in the Segment or a setting of 0 if the customer is not included in the Segment.

Segment Sync Export - BI/Analytics

If you select a Batch Exporter Type of BI/Analytics, the following parameters are displayed:

Figure 20-39: Segment Sync Export - BI/Analytics

- **Segment Filename** - The setting of the Retail Insights Segment Sync Default Filename property is displayed and cannot be changed.

- **Segment Attributes Filename** - The setting of the Retail Insights Segment Attributes Sync Default Filename property is displayed and cannot be changed.

- **Customer Segment Association Filename** - The setting of the Retail Insights Segment Customer Association Sync Default Filename property is displayed and cannot be changed.

- **Attribute Metadata Filename** - The setting of the Retail Insights Attribute Metadata Sync Default Filename property is displayed and cannot be changed.

- **Customer Segment Category Filename** - The setting of the Retail Insights Customer Segment Category Sync Default Filename property is displayed and cannot be changed.

- **Seq N Segment** = Use the dropdown list to select each Segment to include in the export file. Only Segments that have the Publish To Batch Exporter flag selected are available for selection from the dropdown. As you select each Segment, it is added to the **Seq.** and **Attribute** listing.

- **Seq** and **Attribute** - Use the dropdown list to select each attribute to include in the export file. Only attributes that have the Publish To Batch Exporter and Open Access

flags selected are available for selection from the dropdown. Select from the following types of attributes:

- Varchar Type Attribute - The Retail Insights Varchar Type Attribute Allowed Count property controls the number of varchar type attributes you can select for export.

- Numeric Type Attribute - The Retail Insights Numeric Type Attribute Allowed Count property controls the number of numeric type attributes you can select for export.

- Data Type Attribute - The Retail Insights Date Type Attribute Allowed Count property controls the number of data type attributes you can select for export.

- **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above, with a default of no suffix.

Segment Export File - BI/Analytics

The customer segment export file contains the following information:

- Segment ID.

- Segment name.

- Datasource, which is hard-coded to 1.

The file also includes the values for attributes whose names match the following, if they exist:

- CUSTSEG_TYPE (if this attribute is not defined, a cluster type of Rule Based is passed)

- AGE_RANGE

- SEX_MF_CODE

- FAMILY_SIZE

- OCCUPATION_CODE

- EDUCATION_BCKGND_CODE

- ETHNICITY_CODE

- NATIONALITY_CODE

- RELIGION_CODE

- SOCAL_CLASS_CODE

- FAMILY_LIFE_CYCL_CODE

- REGION_CODE

- METRO_AREA_SIZE

- POPULATION_DENSITY

- CLIMATE_CODE

- BENEFIT_SOUGHT_CODE

- USAGE_RATE

- READINESS_TO_BUY_CODE

- OCCASION_CODE

- ACTIVITY_CODE

- INTEREST_CODE

- OPINION_CODE

- ATTITUDE_CODE

- VALUE_CODE

- EFFECTIVE_START

- EFFECTIVE_END

- CUSTSEG_SRC_TYPE

- ANNL_INCOME_RANGE

- CUSTSEG_DESC

The above attributes in Customer Engagement map to segment properties in Retail Insights.

The export file does not include a header row. Instead, there is a separate file with the same name as the segment export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the segment export file name is W_RTL_CUSTSEG_DS.dat, the file containing the header row names is W_RTL_CUSTSEG_DS.dat.ctx.

Segment Attributes Export File - BI/Analytics

The customer segment attributes export file contains the following information:

- Segment ID.

- The CUSTSEG_TYPE attribute value. If this attribute is not defined, a cluster type of Rule Based is passed.

- The CUSTSEG_SRC_TYPE attribute value, if any. Typically set to CUSTOMER.

- The value for each attribute assigned to the segment and selected for export.

- Datasource, which is hard-coded to 1.

The attribute mapping is defined in the generated metadata file. The file name for the metadata file is defined in the Retail Insights Attribute Metadata Sync Default Filename property.

The export file does not include a header row. Instead, there is a separate file with the same name as the segment attributes export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the segment attributes export file name is W_RTL_LYL_TRANS_DS.dat, the file containing the header row names is W_RTL_LYL_TRANS_DS.dat.ctx.

Customer Segment Association Export File - BI/Analytics

The segment customer association export file contains the following information for the customers included in a segment:

- Segment ID.

- Customer ID.

- Datasource, which is hard-coded to 1.

The export file does not include a header row. Instead, there is a separate file with the same name as the segment association export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the segment

association export file name is W_RTL_CUST_CUSTSEG_DS.dat, the file containing the header row names is W_RTL_CUST_CUSTSEG_DS.dat.ctx.

Attribute Metadata Export File - BI/Analytics

This export file defines mapping for attributes. See the [Customer Attribute Metadata Export File - BI/Analytics](#) for an example of attribute mapping.

The export file does not include a header row. Instead, there is a separate file with the same name as the attribute metadata export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the attribute metadata export file name is W_RTL_INT_METADATA_G.dat, the file containing the header row names is W_RTL_INT_METADATA_G.dat.ctx.

Customer Segment Category - BI/Analytics

Currently, an empty customer segment category export file is created.

Points/Awards Transfer Notifications Export

See [Points/Awards Transfer Notification Export](#) for background on this job. This task has the following parameters:

Figure 20-40: Points/Awards Transfer Notification Export

- **Please select transfer notification type** - Indicates the type of transfer notifications to export: All, Awards Only, or Points Only.

- **Specify Awards Transfer Export Filename** - These fields control the creation of the CSV file containing contact information for Customers originating or receiving Award Coupon transfers. At least one entry (prefix, static name, or suffix) is required:

  - **Prefix** - The date and time stamp format to use as a prefix for naming the export file:

    * no prefix - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20170830_123456 where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

      *   yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2017-08-30-123456, where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

The setting of the Responsys Export Filename Default Prefix property defaults.

-   **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Awards Transfer Sync Default Filename defaults.

-   **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

-   **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not selected a prefix format, suffix format, or static name.

- **Specify Points Transfer Export Filename** - These fields control the creation of the CSV file containing contact information for Customers originating or receiving Loyalty Points transfers. At least one entry (prefix, static name, or suffix) is required:

  -   **Prefix** - The date and time stamp format to use as a prefix for naming the export file:

        *   no prefix - Do not use a date and time stamp prefix on the file name.

        *   yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20170830_123456 where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

        *   yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2017-08-30-123456, where the year is 2017, the month is August, the date is 30, and the time is 12:34:56).

The setting of the Responsys Export Filename Default Prefix property defaults.

-   **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Points Transfer Sync Default Filename defaults.

-   **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

-   **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not selected a prefix format, suffix format, or static name.

Award Transfer Notifications Sync Export File

The Award Transfer Notification sync export file contains the following information:

- From Card Number - The Card number originating the transfer. The number is partially masked with X's.

- To Card Number - The Card number receiving the transfer. The number is partially masked with X's.

- From email address - The primary email address of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.

- From phone number - The primary phone number of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.

- To email address - The primary email address of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.

- To phone number - The primary phone number of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.

- Date and time when the transfer took place.

- The amount of the Award Coupon. Might be 0 for an Entitlement Coupon.

An entry for a transfer is included in the file only if there is phone or email contact information for either the originator of the transfer or the recipient, and if an interactive notification request was not successfully sent.

Points Transfer Notifications Sync Export File

The Award Transfer sync export file contains the following information:

- From Card Number - The Card number originating the transfer. The number is partially masked with X's.

- To Card Number - The Card number receiving the transfer. The number is partially masked with X's.

- From email address - The primary email address of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.

- From phone number - The primary phone number of the Customer originating the transfer. Included only if the Customer's contact permissions allow it.

- To email address - The primary email address of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.

- To phone number - The primary phone number of the Customer receiving the transfer. Included only if the Customer's contact permissions allow it.

- Date and time when the transfer took place.

- The number of points transferred.

An entry for a transfer is included in the file only if there is phone or email contact information for either the originator of the transfer or the recipient, and if an interactive notification request was not successfully sent.

Export Card Series

This Task has the following parameters:

Figure 20-41: 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 20-42: Release Expired PreAuth Parameters

Notify Card Renewal

This Task has the following parameters:
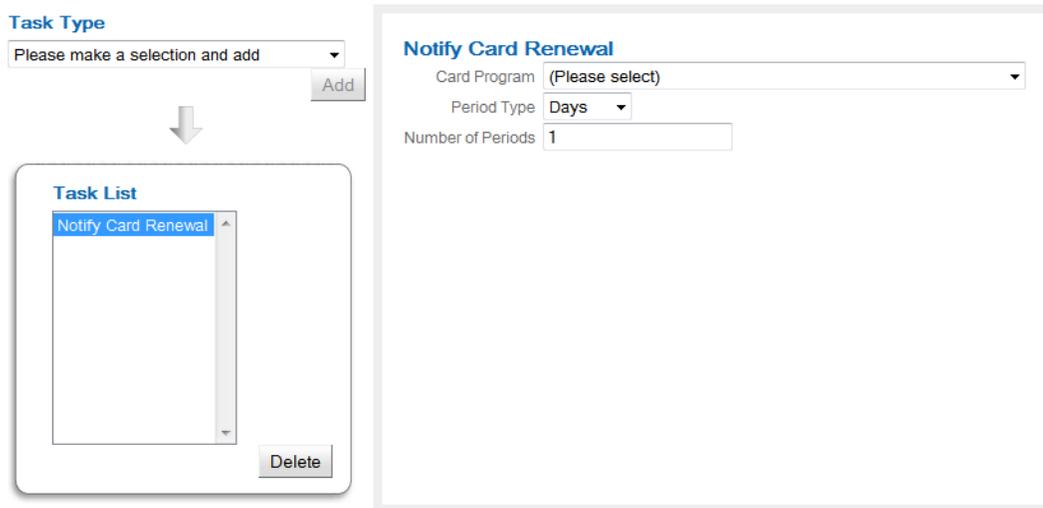
Figure 20-43: Notify Card Renewal Parameters

- **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.

Tender Account Sync

This Task has the following parameter:
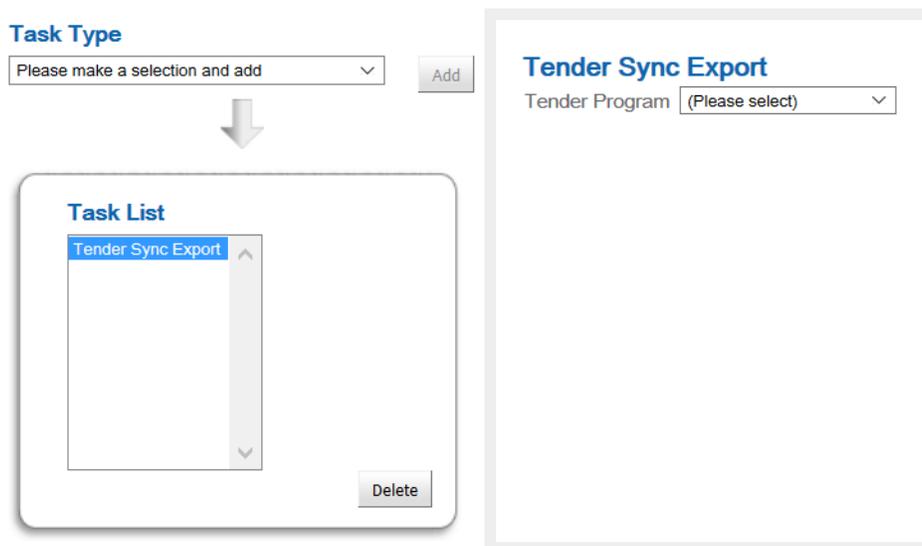
Figure 20-44: Tender Account Sync Parameters

- **Tender Program** - The Tender Program to include in the export files. The Task generates an export file of Tender Accounts and an export file of Tender Account Activity.

Tender Account Export File

The tender account export file contains the following information for each Tender account:

- Tender account ID.

- Last activity date.

- Effective date.

- Account expiry date.

- Card serial number.

- Card number.

- Card activation date.

- Date when card was first used.

- Date when card was last used.

- Card expiry date.

- Date when the card was associated with the customer.

- Start date, if any.

- End date., if any

- Customer ID.

- Primary flag, set to 1 if the customer is the primary account holder.

- Status indicator if Active or Inactive.

- Current balance on the account.

- Book balance for accounting purposes.

- Amount of balance that is frozen or unusable.

- Program ID to uniquely identify the tender program.

- Currency typecode.

- Usage count indicating the total number of times the tender account has been accessed for a transaction.

- Total number of lifetime credits for the account.

- Total number of lifetime debits for the account.

- Date created.

- User who created the account.

- Date updated.

- Use who updated the account.

Tender Account Activity Export File

The tender account activity export files contains the following information:

- Tender account ID.

- Program ID to uniquely identify the tender program.
- Unique identifier for the account activity record.
- Authorization code.
- Customer ID.
- Card number.
- Flag indicating whether the transaction was voided.
- Code to categorize the type of transaction or activity.
- Date and time when the activity took place.
- Amount of the activity or transaction.
- Currency typecode.
- Operator ID from the POS.
- Transaction ID from the POS.
- Transaction ID generated by Customer Engagement.
- Retail location where the activity took place.
- ID or serial number identifying the workstation where the activity took place.
- Date that corresponds to an accounting period fiscal day at the retail store.
- Account ID affected by the activity.
- ID of the activity.
- Flag indicating if the card was swiped during the activity.
- Error code, if any.
- User comments on the activity, if any.
- Code identifying the currency requested for the activity.
- Amount of currency being exchanged.
- Currency exchange rate.
- If the activity was a Card Merge, the unique ID for the source account of the merge.
- Unique identifier for the franchisee, if any.
- Account adjustment reason code, if any.
- Expiration date for the activity.
- Date created.
- User who created the activity.
- Date updated.
- Use who updated the activity.

Issue Anniversary Awards

This Task has the following parameters:

Figure 20-45: 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 the *Customer Engagement Implementation Guide* for more information on export templates.

Notify Awards Expire

This Task has the following parameters:

Figure 20-46: 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.

Award Sync Export

This task has the following parameters:

Figure 20-47: Award Sync Export Parameters

- **Select target batch exporter system** - Set to Marketing by default.

- **Export type** - Controls which records to include in the export file:

    - Export all active records - Include all active award account and award coupon records.

    - Export updated records only - Include award account and award coupon records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available

        Note: Regardless of your selection here, the first time you run the export all active award account and award coupon records are included.

- **Specify export filename** - These fields control the creation of the file containing new or updated award account records.

    At least one entry (prefix, static name, or suffix) is required:

    - **Prefix** - The date and time stamp format to use as a prefix for naming the export file.

        * no prefix - Do not use a date and time stamp prefix on the file name.

        * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

The setting of the Responsys Export Filename Default Prefix property defaults.

- **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Award Account Sync Default Filename property defaults.

- **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

- **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

- **Specify export filename** - These fields control the creation of the file containing new or updated award coupon records.

  At least one entry (prefix, static name, or suffix) is required:

  - **Prefix** - The date and time stamp format to use as a prefix for naming the export file.

    * no prefix - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

  The setting of the Responsys Export Filename Default Prefix property defaults.

  - **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Award Coupon Sync Default Filename property defaults.

  - **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above. The setting of the Responsys Export Filename Default Suffix property defaults.

  - **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

- **Award Program** = Use the dropdown list to select an award program to include in the export files.

Award Account Export File

The award account export file contains the following information:

- Customer ID.

- Card number.

- Card active flag (set to 1 if active; if not active, indicates a deactivation or merge).

- Card expiration date.
- First used date.
- Last used date.
- Program name.
- Program ID.
- Update date.
- Currency code.
- Account expiration date.
- Account ID.
- Award balance.
- E-award count.
- Entitlement count.

Award Coupon Export File

The award coupon export file contains the following information:

- Customer ID.
- Card number.
- Account ID.
- Program ID.
- Coupon typecode (e-award or entitlement).
- Coupon ID.
- Coupon balance, if any; for example, an entitlement for a line item discount would not have a balance.
- Currency code.
- Deal name, if any; for example, a deal name is specified for an entitlement.
- Deal ID, if any; for example, a deal ID is specified for an entitlement.
- Expiration date.
- Update date.

Distribute Loyalty Awards

This Task has the following parameter:
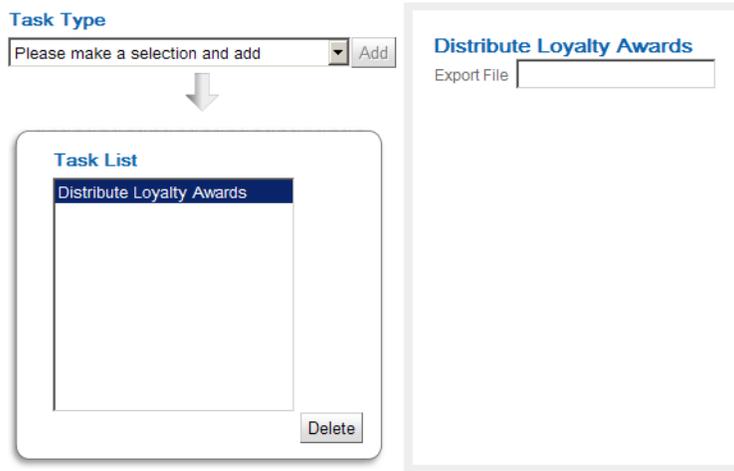
Figure 20-48: Distribute Loyalty Awards Parameters

> **Tip:** The <u>Create Loyalty Awards</u> process should be run before this process.

- **Export File** - This <u>Text Field</u> 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 the *Customer Engagement Implementation Guide* for more information on export templates.

Create Loyalty Awards

This Task has the following parameters:
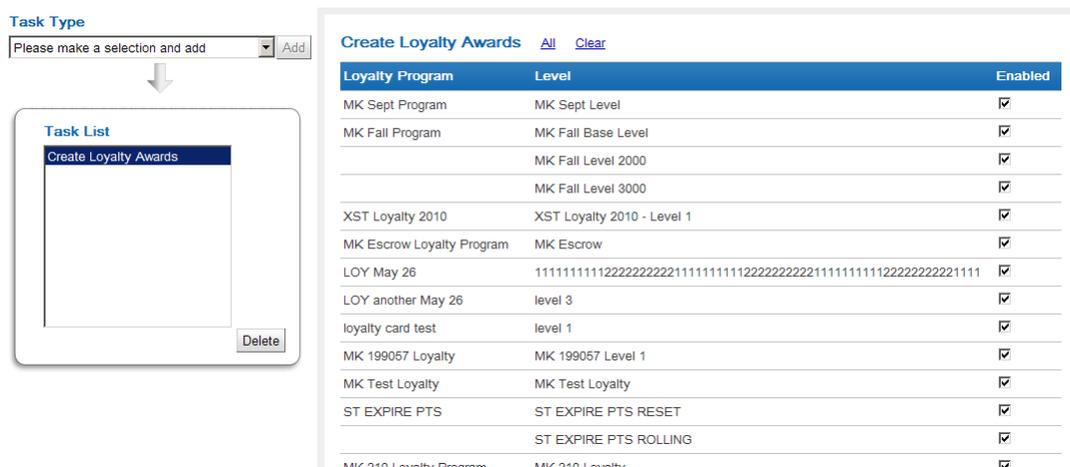
Figure 20-49: Create Loyalty Awards Parameters

- Each <u>Check Box</u> in the <u>List</u> 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, three files are created: an E-Award Export File, an Entitlement Coupons File, and a Loyalty Level Movement Export File. See the *Customer Engagement Implementation Guide* for more information on export templates.

Earn Loyalty Points

This Task has no additional parameters.
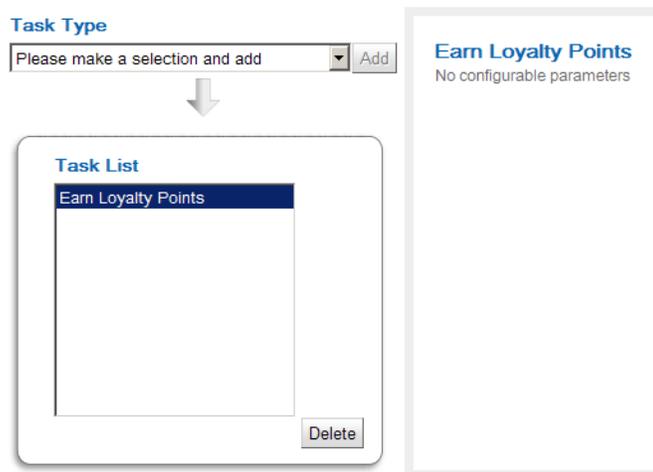
Figure 20-50: Earn Loyalty Points Parameters

Expire Loyalty Points

This Task has no additional parameters.
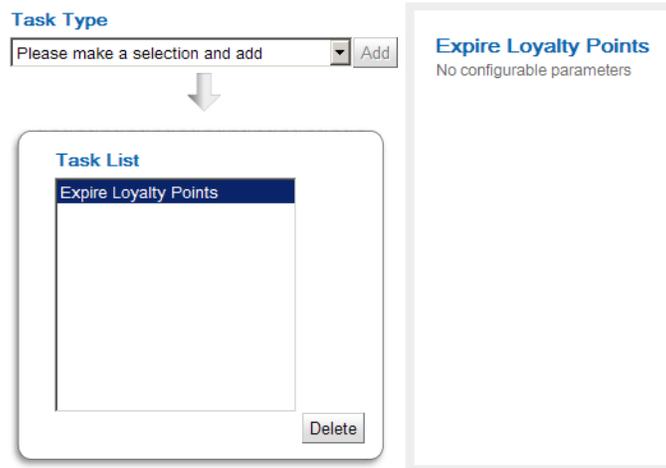
Figure 20-51: Expire Loyalty Points Parameters

Reset Loyalty YTD Points

This Task has no additional parameters.
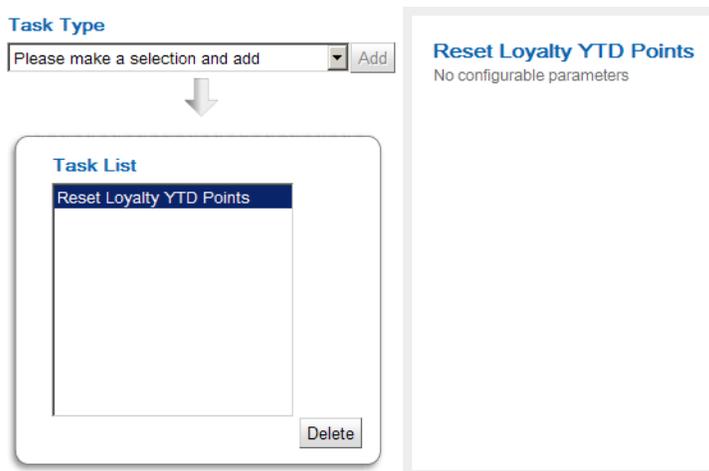
Figure 20-52: Reset Loyalty YTD Points Parameters

Loyalty Account Sync Export

Before you submit this task, you must select an export target system of either Marketing for a system such as Responsys, or BI/Analytics for a system such as Retail Insights. The Supported Batch Exporter Types property controls which of these options are available.

See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information about System Configuration.

Figure 20-53: Loyalty Account Sync Export Parameters - Select export target system

Loyalty Account Sync Export - BI/Analytics

If you select BI/Analytics as the export target system, the following options are displayed:

Figure 20-54: Loyalty Account Sync Export Parameters - BI/Analytics

- **Export type** - Controls which records to include in the export file:

    - Export all active records - Include all active loyalty account records.

- Export updated records only - Include loyalty account records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available

> **Note:** Regardless of your selection here, the first time you run the export all active loyalty account records are included.

- **Specify export filename** - If you selected an Export type of BI/Analytics, the setting of the Retail Insights Loyalty Account Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Account Sync Export File - BI/Analytics

The customer export file is a pipe-delimited values file that typically contains the following information:

- Loyalty Account Id

- Card Serial Number - Sixteen-digit number embossed on the card

- Primary Customer Number

- Loyalty Program Id

- Loyalty Program Level Id

- Account Active Flag

- Account Expiry Flag

- Earned Points Balance

- Escrow Points Balance

- Last Award Processed Date

- Last Accrual Date

- Last Program Level Change Date

- Last Transaction Date

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty account sync export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty account sync export file name is W_RTL_LYL_ACCOUNT_DS.dat, the file containing the header row names is W_RTL_LYL_ACCOUNT_DS.ctx.

Loyalty Account Sync Export - Marketing

If you select an export target system of Marketing, the following options are displayed

Figure 20-55: Loyalty Account Sync Export Parameters - Marketing

- **Select target batch exporter system** - Set to Marketing by default.

- **Export type** - Controls which records to include in the export file:

  - Export all active records - Include all active loyalty records.

  - Export updated records only - Include loyalty records only if they have changed since the last export. With this selection, the Once Immediately and Once Later options for scheduling the job are not available

    Note: Regardless of your selection here, the first time you run the export all active loyalty records are included.

- **Specify export filename** - These fields control the creation of the CSV file containing new or updated loyalty records. At least one entry (prefix, static name, or suffix) is required:

  - **Prefix** - The date and time stamp format to use as a prefix for naming the export file:

    * None - Do not use a date and time stamp prefix on the file name.

    * yyyyMMdd_HHmmss - Use a date and time stamp prefix in this format (for example, 20160630_123456 where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    * yyyy-MM-dd_HHmmss - Use a date and time stamp prefix in this format (for example, 2016-06-30-123456, where the year is 2016, the month is June, the date is 30, and the time is 12:34:56).

    The setting of the Responsys Export Filename Default Prefix property defaults.

  - **Static Name** - The text string to include in the file name between the prefix and suffix, if any. The setting of the Responsys Loyalty Account Sync Default Filename property defaults.

- **Suffix** - The date and time stamp format to use as a suffix for naming the export file. The date and time stamp format options for the suffix are the same as for the prefix, described above, with a default of no suffix.

- **Filename** - Displays an example of the export file name with the prefix and suffix format, if any. This field is blank if you have not yet selected a prefix format, suffix format, or static name.

• **Loyalty Program** - Select a single loyalty program to include in the export file.

Loyalty Account Sync Export File - Marketing

The customer export CSV file contains the following information:

• Customer ID.

• Card number.

• Card active flag (set to 1 if active; if not active, indicates a deactivation or merge).

• Card expiration date.

• First use date.

• Last use date.

• Life-to-date balance.

• Year-to-date balance.

• Earned point balance.

• Escrow point balance.

• Program name.

• Level ID.

• Level name.

• Account expiration date.

• Update date.

• Account ID.

Loyalty Account Activity Sync Export

This task has the following parameters:

Figure 20-56: Loyalty Account Activity Sync Export

- **Batch Exporter Type** - Defaults to BI/Analytics and cannot be changed.

- **Export Type** - Controls which records to include in the export file:

  - Export all active records - Include all active loyalty account records.

  - Export updated records only - Include loyalty account records only if they have changed since the last export. With this selection, the Once Immediately and

    Note: Regardless of your selection here, the first time you run the export all active loyalty account records are included.

    Once Later options for scheduling the job are not available

- **Specify export filename** - The setting of the Retail Insights Loyalty Transaction Data Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Account Activity Export File - BI/Analytics

The export file is pipe-delimited, and typically contains the following information:

- Loyalty Transaction ID - Main identifier of the loyalty account activity.

- Loyalty Program ID - Unique identifier of the loyalty program.

- Loyalty Program Level ID - Unique identifier of the loyalty program level.

- Loyalty Account ID - Main identifier of the loyalty account associated with the transaction.

- Card Serial Number - The card associated with the loyalty account.

- Customer Number - Unique identifier of the primary customer associated with the card.

- Transaction Date - Date when the loyalty transaction took place.

- Transaction Type Code - Includes Activate, Deactivate, Issue, PointRecovery, Return, Award, Expire, ChangeLevel, SustainExtension, AccountMerge, ResetExpirationDate, TransferOut, and TransferIn. Inquiries are not included.

- Transaction Trigger Type - System where the transaction was triggered from, such as POS, CRM server, or loyalty admin module.

- Retail Transaction ID - Unique identifier of the transaction, provided by the POS System.

- Points Accrued - Number of points accrued for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number.

- Points Redeemed - Number of Points Redeemed for an Award.

- Bonus Points - Number of points issued as bonus points for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number.

- Points Expired - Number of points expired as a part of this transaction.

- Transaction Amount - The sale transaction amount that has earned the given points in original currency for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number

- Original Currency Code - The currency code of the transaction amount.

- Converted Amount - The sale transaction amount that has earned the given points in program currency for an Issue, Point Recovery, Earn, or Return. For a return, this is a negative number.

- Program Currency Code - The currency code of the program.

- Location ID - Retail location ID where the transaction occurred.

- Points Transferred Out - The total number of points transferred out for the transaction. Included as a negative number when the transaction type is Transfer Out.

- Points Transferred In - The total number of points transferred in for the transaction. Included as a positive number when the transaction type is Transfer In.

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty account activity export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty account activity export file name is W_RTL_LYL_TRANS_DS.dat, the file containing the header row names is W_RTL_LYL_TRANS_DS.dat.ctx.

Loyalty Program Sync Export

This task has the following parameters:

Figure 20-57: Loyalty Program Sync Export

- **Batch Exporter Type** - Defaults to BI/Analytics and cannot be changed.

- **Export Type** - Controls which records to include in the export file:

  - Export all active records - Include all active loyalty programs.

  - Export updated records only - Include loyalty programs only if they have changed since the last export.

    Note: Regardless of your selection here, the first time you run the export all active loyalty programs are included.

- **Specify export filename** - The setting of the Retail Insights Loyalty Program Data Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Program Data Export File - BI/Analytics

The export file is pipe-delimited, and typically contains the following information:

- Loyalty Program Id

- Loyalty Program Name

- Points Name

- Points Currency Value

- Loyalty Program Active Flag

- Loyalty Program Start Date

- Loyalty Program End Date

- Loyalty Program Level Id

- Loyal Program Level Name

- Loyalty Program Level Active Flag

- Default Program Level flag

- Program Currency

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty program data export file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty program data export file name is W_RTL_LYL_PROG_DS.dat, the file containing the header row names is W_RTL_LYL_PROG_DS.dat.ctx.

Loyalty Award Transaction Sync Export

This task has the following parameters:

Figure 20-58: Loyalty Award Transaction Sync Export

- **Batch Exporter Type** - Defaults to BI/Analytics and cannot be changed.

- **Export Type** - Controls which records to include in the export file:

    - Export all active records - Include all award transactions for all active loyalty programs.

- Export updated records only - Include award transactions only if they have occurred since the last export.

> **Note:** Regardless of your selection here, the first time you run the export all award transactions for all active loyalty programs are included.

- **Specify export filename** - The setting of the Retail Insights Loyalty Award Transaction Data Sync Export Default Filename property is displayed and cannot be changed.

Loyalty Award Transaction Data Export File - BI/Analytics

The export file is pipe-delimited, and typically contains the following information:

- Award Transaction ID- The unique numeric identifier of the transaction.

- Award Account ID - The unique numeric identifier of the award account.

- Award Program ID - The unique numeric identifier of the award program.

- Card Serial Number - The serial number for the account.

- Customer Number - The unique numeric identifier of the customer.

- Award Type - E-Award or Entitlement Coupon.

- Award Transaction Type code - IssueCoupon, IssueEntitlementCoupon, Redeem, AutomaticRedeem, TransferIn, TransferOut, VoidAwardTransaction, NotifyCouponExpire, ActivateAccount, DeactivateAccount, and AccountMerge.

- Coupon ID - The unique numeric identifier for the award coupon.

- Coupon Effective Date - The date when the coupon becomes effective.

- Coupon Expiry Date - The date when the coupon expires.

- Issue Amount - Amount awarded in award currency during a E-Award issue. Populated when the transaction type is IssueCoupon or IssuePromoAwardCoupon.

- Redeem Amount - Amount redeemed in award currency during an E- Award redemption. Populated when the transaction type is Redeem or AutomaticRedeem.

- Balance Amount - Balance of an E-Award coupon.

- Deal ID - Deal associated to the given Coupon for an entitlement deal award.

- Deal Name - The name of an entitlement deal.

- External Deal ID - Promote-side Deal ID that is used to trigger the deal at POS for an entitlement coupon. The external deal ID and the Deal ID can be the same.

- Max Redeem Count - The maximum redeemable count for the deal. Included only for an Entitlement Deal.

- Redeemed Count - The redeemed count for this specific entitlement coupon record. Included only for an Entitlement Deal.

- Redemption Balance - The total count eligible for redemption. Calculated by subtracting the Redeemed Count from the Max Redeem Count. Included only for an Entitlement Deal.

- Award Currency - The currency defined for the award program.

- Award Transaction Date - The date when the transaction took place.

- Coupon Fully Redeemed Flag - Flag indicating if the given coupon has been fully redeemed. For an E-Award, this is the Issue Amount = Redeem Amount. For an Entitlement Deal, this is the Max Redeem Count = Redeemed Count.

- Coupon Expiry Flag - Flag indicating if the Expiry Date for the coupon has passed.

- Transfer Out Amount - The amount transferred out to another account.

- Transfer In Amount - The amount transferred in from another account.

The export file does not include a header row. Instead, there is a separate file with the same name as the loyalty award transaction data file, but with an extension of .ctx, that includes the titles of each column in the export file. For example, if the loyalty award transaction data file name is W_RTL_LYL_AWD_DS.dat, the file containing the header row names is W_RTL_LYL_AWD_DS.dat.ctx.

Delete Customers

This Task has the following parameters:

Figure 20-59: Delete Customers Parameters

- **Number of Days** - This Text Field defines the number of days after a Customer's Last Purchase Date on which a Customer will be deleted.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Customers that would be deleted, or if the Customers will be deleted.

  - **Checked (☑)** - Only a count of the Customers will be reported.

  - **Unchecked (☐)** - The Customers will be deleted.

Delete Inactive Customers

This Task has the following parameters:

Figure 20-60: 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 Inactive Customer Addresses

This Task has the following parameters:

Figure 20-61: Delete Inactive Customer Addresses Parameters

The deletion is always based on the setting of the Active flag. Customer addresses are flagged as inactive when you select the Delete option for the address.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Customer addresses that would be deleted, or if the Customer addresses will actually be deleted.

  - **Checked (☑)** - Only a count of the Customer addresses will be reported. The listing displayed at the Job Details Window indicates the total number of inactive addresses that would be deleted for all Customers, and the total number of Customers that would have inactive addresses deleted. These numbers might be different, for example, if you deleted two addresses for the same Customer.

  - **Unchecked (☐)** - The Customer addresses will be deleted.The listing displayed at the Job Details Window indicates the total number of inactive addresses that were deleted for all Customers, and the total number of Customers that had inactive addresses deleted. These numbers might be different, for example, if you deleted two addresses for the same Customer.

Delete Inactive Customer Phone Numbers

This Task has the following parameters:
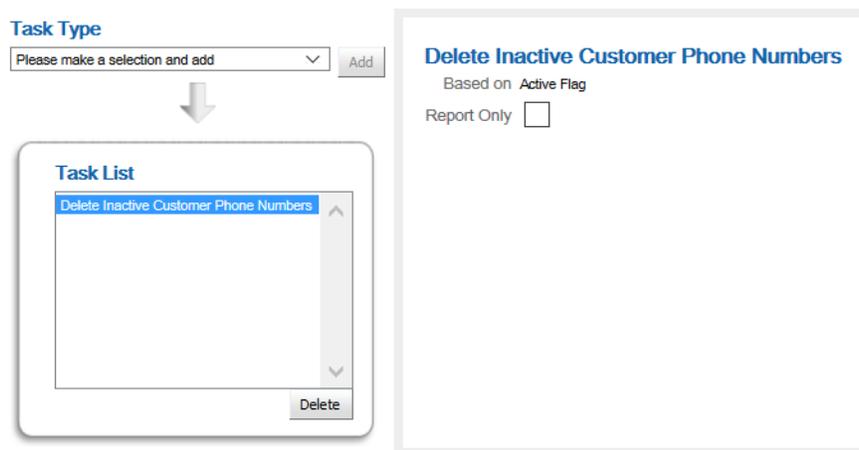
Figure 20-62: Delete Inactive Customer Phone Numbers Parameters

The deletion is always based on the setting of the Active flag. Customer phone numbers are flagged as inactive when you select the Delete option for the phone number.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Customer phone numbers that would be deleted, or if the Customer numbers will actually be deleted.

  - **Checked (☑)** - Only a count of the Customer phone numbers will be reported. The listing displayed at the Job Details Window indicates the total number of inactive phone numbers that would be deleted for all Customers, and the total number of Customers that would have inactive phone numbers deleted. These numbers might be different, for example, if you deleted two phone numbers for the same Customer.

  - **Unchecked (☐)** - The Customer phone numbers will be deleted.The listing displayed at the Job Details Window indicates the total number of inactive phone numbers that were deleted for all Customers, and the total number of Customers that had inactive phone numbers deleted. These numbers might be different, for example, if you deleted two phone numbers for the same Customer.

Delete Inactive Customer Email Addresses

This Task has the following parameters:

Figure 20-63: Delete Inactive Customer Email Addresses Parameters

The deletion is always based on the setting of the Active flag. Customer email addresses are flagged as inactive when you select the Delete option for the email address.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Customer email addresses that would be deleted, or if the Customer email addresses will actually be deleted.

  - **Checked (☑)** - Only a count of the Customer email addresses will be reported. The listing displayed at the Job Details Window indicates the total number of inactive email addresses that would be deleted for all Customers, and the total number of Customers that would have inactive email addresses deleted. These numbers might be different, for example, if you deleted two email addresses for the same Customer.

  - **Unchecked (☐)** - The Customer email addresses will be deleted.The listing displayed at the Job Details Window indicates the total number of inactive email addresses that were deleted for all Customers, and the total number of Customers that had inactive email addresses deleted. These numbers might be different, for example, if you deleted two email addresses for the same Customer.

Delete Transaction History

This Task has the following parameters:

Figure 20-64: Delete Transaction History Parameters

- **Number of Days** - This Text Field defines the number of days after a Transaction Business Date on which a Transaction will be deleted.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Transactions that would be deleted, or if the Transactions will be deleted.

  - **Checked (☑)** - Only a count of the Transactions will be reported.

  - **Unchecked (☐)** - The Transactions will be deleted.

Delete Promotion

This Task has the following parameters:

Figure 20-65: Delete Promotion Parameters

- **Number of Days** - This Text Field defines the number of days after a Promotion's End Date on which a Promotion will be deleted.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Promotions that would be deleted, or if the Promotions will be deleted.

- **Checked (☑)** - Only a count of the Promotions will be reported.

- **Unchecked (☐)** - The Promotions will be deleted.

Delete Merged/Archived Customers

This Task has the following parameters:

Figure 20-66: Delete Merged/Archived Customers Parameters

- **Number of Days** - This <u>Text Field</u> 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 <u>Check Box</u> indicates whether the Task will only report the number of Customers that would be deleted, or if the Customers will be deleted.

  - **Checked (☑)** - Only a count of the Customers will be reported.

  - **Unchecked (☐)** - The Customers will be deleted.

Delete Loyalty Accounts and Activities

This Task has the following parameters:

Figure 20-67: 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 and activities will be deleted.

Delete Loyalty Inquiry Activities

This Task has the following parameters:

Figure 20-68: Delete Loyalty Inquiry Activities Parameters

- **Number of Days** - This Text Field defines the number of days after a Loyalty Inquiry's Last Activity Date on which a Loyalty Inquiry will be deleted.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Loyalty Inquiries that would be deleted, or if the Loyalty Inquiries will be deleted.

    - **Checked (☑)** - Only a count of the Loyalty Inquiries will be reported.

    - **Unchecked (☐)** - The Loyalty Inquiries will be deleted.

Delete Segments

This Task has the following parameters:

Figure 20-69: Delete Segments Parameters

- **Number of Days** - This Text Field defines the number of days after a Segment's Last Run Date on which a Segment will be deleted.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Segments that would be deleted, or if the Segments will be deleted.

    - **Checked (☑)** - Only a count of the Segments will be reported.

    - **Unchecked (☐)** - The Segments will be deleted.

Delete Segment History

This Task has the following parameters:

Figure 20-70: Delete Segment History Parameters

- **Number of Days** - This Text Field defines the number of days after a Segment's Last Run Date on which the History for the Segment will be deleted.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Segment Histories that would be deleted, or if the Segment Histories will be deleted.

   - **Checked (☑)** - Only a count of the Segment Histories will be reported.

   - **Unchecked (☐)** - The Segment Histories will be deleted.

Delete Job History

This Task has the following parameters:

Figure 20-71: Delete Job History Parameters

- **Number of Days** - This Text Field defines the number of days after a Job's End Date on which the History for the Job will be deleted.

- **Report Only** - This [Check Box](#) indicates whether the Task will only report the number of Job Histories that would be deleted, or if the Job Histories will be deleted.

    - **Checked (☑)** - Only a count of the Job Histories will be reported.

    - **Unchecked (☐)** - The Job Histories will be deleted.

Delete Gift Registries

This Task has the following parameters:

Figure 20-72: 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 Item Registries

This Task has the following parameters:

Figure 20-73: Delete Inactive Item Registries

- **Number of Days** - This Text Field defines the number of days after an Inactive Wish List's or Gift Registry's Last Update Date on which the Wish List 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 Wish Lists will be deleted.

  - **Checked (☑)** - Only a count of the Wish Lists will be reported.

  - **Unchecked (☐)** - The Wish Lists will be deleted.

Delete Social Activity

This Task has the following parameters:

Figure 20-74: 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 <u>Text Field</u> defines the number of days after a Social Activity item's Last Activity Date on which the item will be deleted.

- **Report Only** - This <u>Check Box</u> indicates whether the Task will only report the number of Social Activity items that would be deleted, or if the Social Activity will be deleted.

    - **Checked (☑)** - Only a count of the Social Activity items that will be reported.

    - **Unchecked (☐)** - The Social Activity will be deleted.

Delete Award Inquiry Activities

This Task has the following parameters:

Figure 20-75: Delete Award Inquiry Activities Parameters

- **Number of Days** - This <u>Text Field</u> defines the number of days after a Award Inquiry's Last Activity Date on which a Award Inquiry will be deleted.

- **Report Only** - This <u>Check Box</u> 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.

Delete Web Service Tracking

This Task has the following parameters:

Figure 20-76: Delete Web Service Tracking Parameters

- **Number of Days** - This Text Field defines the number of days after which tracked Web Service activity will be deleted, based on the date when the record in the database was most recently updated.

- **Report Only** - This Check Box indicates whether the Task will only report the number of Web Service Tracking records that would be deleted, or if the Web Service Tracking records would be deleted.

  - **Checked (☑)** - Only a count of the consolidated daily, weekly, and monthly Web Service Tracking records will be reported.

  - **Unchecked (☐)** - The consolidated Web Service Tracking records will be deleted.

Delete Batch Process Tracking

This Task has the following parameters:

Figure 20-77: Delete Batch Process Tracking Parameters

- **Number of Days** - This [Text Field](#) defines the number of months after which tracked Batch Process activity will be deleted, based on the date when processing ended. If this field is set to 0, all existing consolidated daily, weekly, and monthly Batch Processing data is eligible for deletion.

- **Report Only** - This [Check Box](#) indicates whether the Task will only report the number of Batch Process Tracking records that would be deleted, or if the Batch Process Tracking records would be deleted.

  - **Checked (☑)** - Only a count of the consolidated daily, weekly, and monthly Batch Process Tracking records will be reported.

  - **Unchecked (☐)** - The consolidated Batch Process Tracking records will be deleted.

Delete Stored Files

This Task has the following parameters:

Figure 20-78: Delete Stored Files Parameters

- **Number of Days** - This [Text Field](#) defines the number of days after which transfer file data currently stored in the database will be deleted, based on each file's Create Date.

- **Report Only** - This [Check Box](#) indicates whether the Task will only report the number of stored file records that would be deleted, or if the stored file records would be deleted.

  - **Checked (☑)** - Only a count of the stored transfer files records will be reported.

  - **Unchecked (☐)** - The stored transfer file records will be deleted.

Data stored in the database on failed transfer files is deleted automatically based on the Delete Failed Transfer in X Days system configuration property.

See [Chapter 26](#), ["File Review, Transfer, and Dashboard"](#) for background on working with transfer file data.

Aggregate Loyalty Facts

This Task has the following parameters:

Figure 20-79: 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.
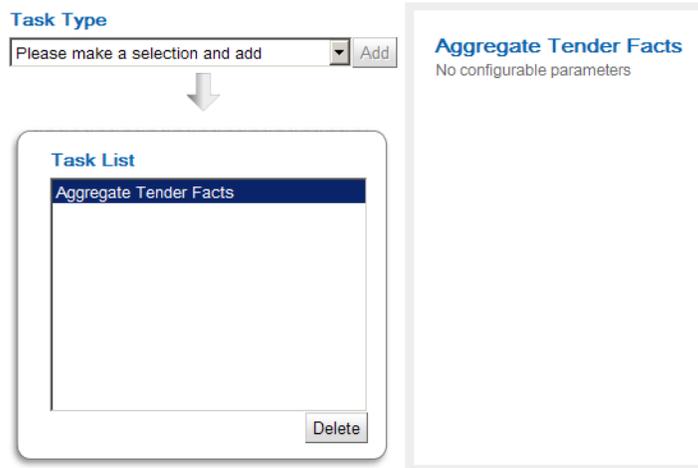
Figure 20-80: Aggregate Tender Facts Parameters

Dynamic Promotions

> **Tip:** This job should be scheduled for the very early morning, before Users will be generating Promotions. This allows the Job to run before any Dynamic Promotions are generated (see below).

This Task has no additional parameters.
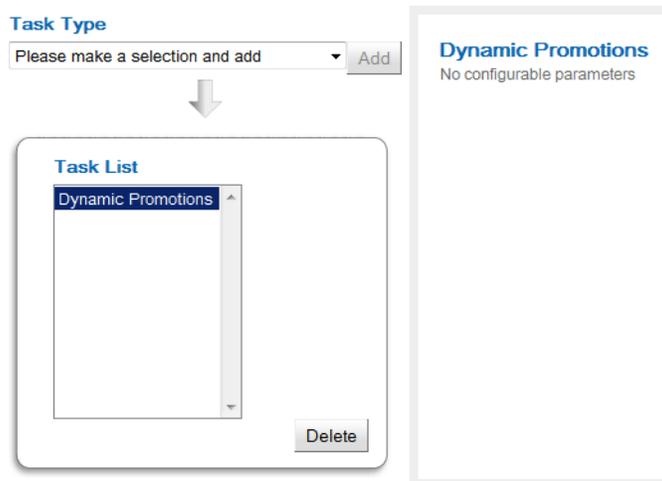
Figure 20-81: Dynamic Promotions Parameters

> **Note:** 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.

Promotion Response Data Import

This Task has no additional parameters.
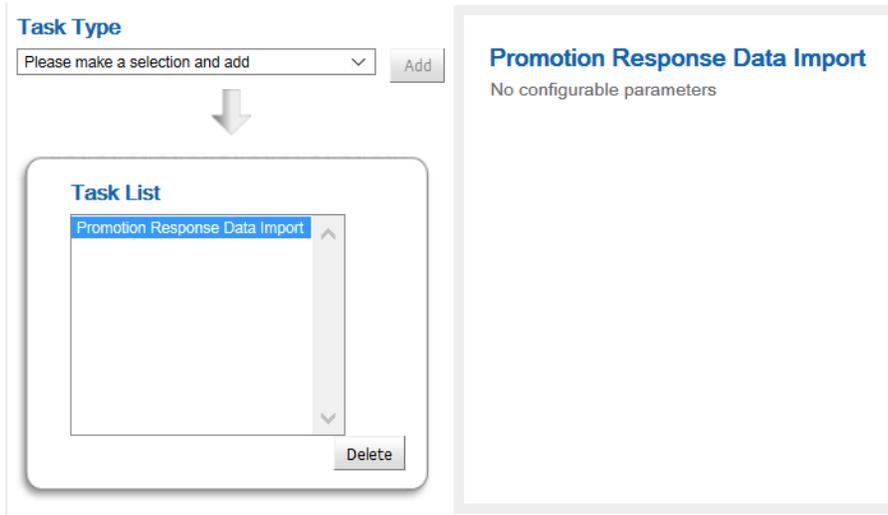
Figure 20-82: Promotion Response Data Import

This task processes the following import files to create Customer Notes recording each of the specific customer events. These files are typically submitted by a marketing system such as Responsys.

SENT_EMAILS Promotion Import File

This import file includes the following information:

- Campaign ID.

- Promotion ID.

- Event Type of 1 (sent email).

- Customer ID.

- Event Captured Date.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_SENT.

- User - OMC.

- Location - The organization's default location.

- Note contents:

  - Campaign ID.

  - Promotion ID.

  - Event Type ID.

CLICK_EMAILS Promotion Import File

This import file includes the following information:

- Event Type of 5 (click email).

- Customer ID.

- Event Captured Date.

- Campaign ID.

- Promotion ID.

- Offer Name (the name from the marketing system, such as Responsys).

- Offer Category (the category from the marketing system, such as Responsys).

- Offer URL.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_CLICKED.

- User - OMC.

- Location - The organization's default location.

- Note contents:

    - Campaign ID.

    - Promotion ID.

    - Event Type ID.

    - Offer Name.

    - Offer Number.

    - Offer Category.

    - Offer URL.

OPEN_EMAILS Promotion Import File

This import file includes the following information:

- Event Type of 4 (open email).

- Account ID.

- List ID (the list ID from the marketing system, such as Responsys).

- RIID (ID code from the marketing system, such as Responsys).

- Customer ID.

- Event Captured Date.

- Campaign ID.

- Promotion ID.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_OPENED

- User - OMC.

- Location - The organization's default location.

- Note contents:

    - Campaign ID.

    - Promotion ID.

    - Event Type ID.

FAIL_EMAILS Promotion Import File

This import file includes the following information:

- Customer ID.

- Event Type of 8 (failed email).

- Event Captured Date.

- Campaign ID.

- Promotion ID.

Each processed record in the import file creates a Customer Note:

- Type - EMAIL_FAILED

- User - OMC.

- Location - The organization's default location.

- Note contents:

  - Campaign ID.

  - Promotion ID.

  - Event Type ID.

Social Network Listener

This task has the following parameters:

Figure 20-83: Social Network Listener Parameters

- **Social Network** - This Selection Menu determines the social network to search for social activity matching the entered criteria.

Social Network Update

This task has the following parameters:

Figure 20-84: 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 20-85: 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.

File Transmission Activity Email Notification

This task has the following criteria:

Figure 20-86: File Transmission Activity Email Notification Parameters

- **Select processed file result type from below** - These Radio Buttons determine the result types to include in the generated email:

  - **All** - Include all results in the generated email.

  - **Error/Warning** [DEFAULT] - Include only errors or warnings in the generated email.

The email contents are similar to the information displayed at the Batch Import Review screens. See the *Customer Engagement Batch Processing and Web Services Guide* for more information.

- **Select Users** - Select one or more Users to receive the email from the Selected Users Selection Menu.

  a. Click Select Users to open a search window and search for the User to receive the email.

  b. Click **Add**.

     The User is added to the Selected Users List.

  c. Repeat steps a-b for each User to be added to the Selected Users List.

  d. To remove a User from the Selected Users List, highlight the User name in the Selected Users to select it. and click **Remove**. The User is removed from the Selected Users List.

- **Notify Email Address** - Enter one or more emails to add to the Notification Email List.

  a. Enter the email address.

  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.

21

Analytics/Reports

Overview

Oracle Retail Customer Engagement Cloud Services provides a set of pre-defined reports that cover all aspects of the application. The results can be modified through sorting and filtering.

The use of Oracle BI Publisher provides additional options for converting the reports into different file formats, as well as scheduling reports, reviewing job history, and republishing options.

About this Chapter

This chapter contains the following information:

- Reports - Describes the Reports page and the procedures for creating a Report, including:
  - Run a Report
  - Refresh Report List
  - Report Organization, including:
    * Account Management
    * Award Management
    * Campaign Management
    * Card Management
    * Customer Management
    * Item Management
    * Location Operations
    * Loyalty Management
    * Registry Management
    * Segment Management
    * Task Management
    * Tender Account Management
- Displaying Report - Describes the Reports display page, including:
  - BI Publisher Toolbar
  - View Report Options

- BI Publisher Actions
- Report Generation Options and Contents
  - Account Management Report
  - Award Management Reports
  - Campaign Management Reports
  - Card Management Reports
  - Customer Management Reports
  - Item Management Reports
  - Location Operations Reports
  - Loyalty Management Reports
  - Registry Management Reports
  - Segment Management Reports
  - Task Management Reports
  - Tender Account Management Reports

Reports

The Reports page is opened through the **Analytics->Reports** menu option.
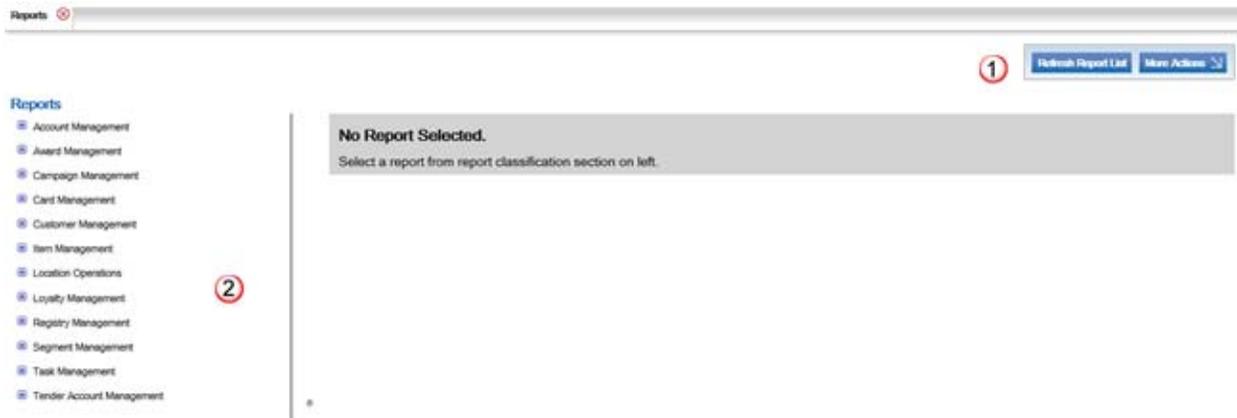
Figure 21-1: Reports Page

Table 21-1: *Reports Page Key*

Item	Description
①	**Refresh Report Button** - This button refreshes the displayed report information.
②	**Report Selection** - This area contains the Report categories and the individual Reports that can be selected to run.

Note: The **More Actions** button is not currently implemented.

Run a Report

To run a report:

1. Click the **Analytics->Reports** menu option.

   The Reports page opens (Figure 21-1).

2. Select the Report to run:

   a. In the Report Selection area, click the expand (⊞) button to open a Report category (see [Report Organization](#) for a list of Report categories and the Reports within each category).

   b. Click a Report to select it.

   A Report Criteria screen opens.
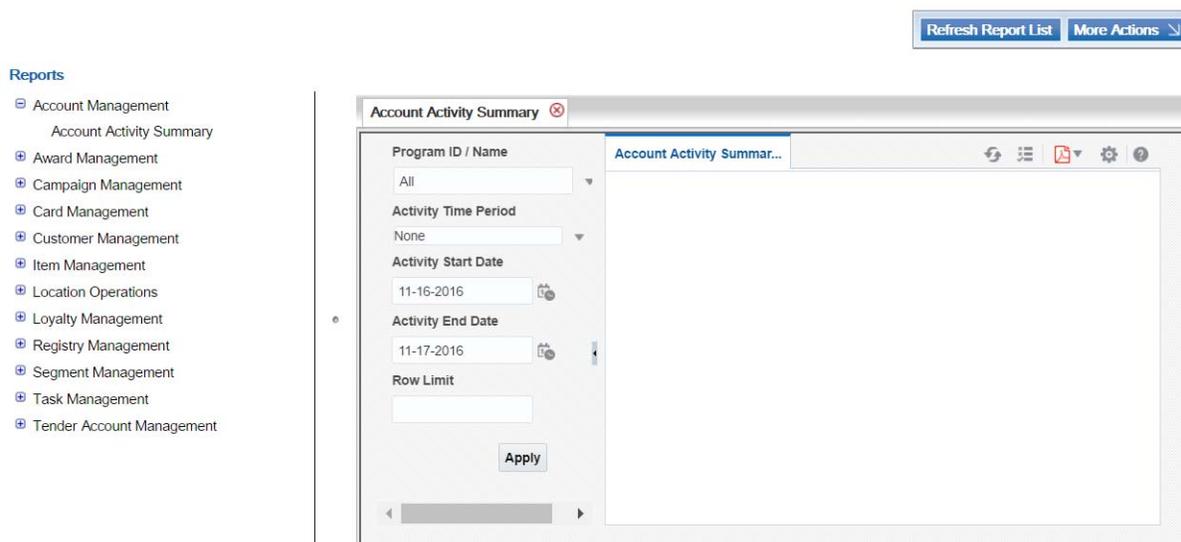
Figure 21-2: Report Selection Criteria

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 **Apply** button.

5. While the report is running, its progress is indicated in the central pane.
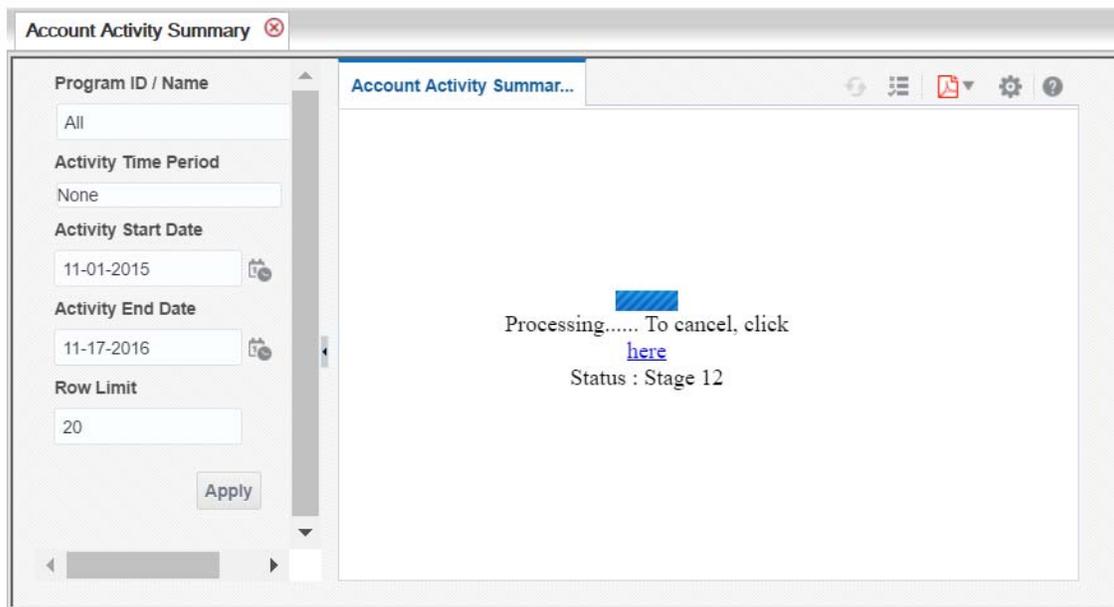
Figure 21-3: Report Processing

6. When processing is complete, the results are displayed in a Displaying Report page.

Figure 21-4: Report Run Results

Refresh Report List

Click the **Refresh Report List** option in the Run a Report 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 on the report.

> **Note:** In most cases, if no information is entered for a configuration field, all results for that field are included on the report (up to the defined **Limit Records** setting).

The reports available for generation are listed below.

Account Management

Account Activity Summary - This report presents transaction count and value summary information about the program activities, segregated by activity typecode, user, and reason code. See Account Activity Summary Report for more information.

Award Management

Award Account Activity Details - This report presents detailed information about activities performed on one or more given Award Accounts. See Award Account Activity Details Report for more information.

Award Account Activity Errors - This report presents detailed information about transaction errors associated with Award Accounts. See Award Account Activity Errors Report for more information.

Award Account Activity Trend - This report presents daily counts of Award Transactions, organized by Activity type, within a Program, and includes charts illustrating award account activity. See Award Account Activity Trend Report for more information.

Award Account Balance - This report presents the Account balance available at run time for each Account. See Award Account Balance Report for more information.

Award Account Error Trend - This report presents information about the number of times transaction errors occurred, by date, for each Program, and includes a chart illustrating error incidence. See Award Account Error Trend Report for more information.

Award Account Last Use - This report presents counts of Accounts within an Award Program, grouped by the number of days between last use date and system date at run time. See Award Account Last Use Report for more information.

Award Activity By Location - This report presents Award activity within a Program, by Location, for a selected date range. See Award Activity By Location Report for more information.

Award Activity By Program - This report presents a summary of Account activities, listed by type, for each Program. See Award Activity By Program Report for more information.

Award Entitlement Expiration - This report presents a listing of the expiration dates of issued Entitlement Coupons, providing information on how many are due to expire or have expired. See Award Entitlement Expiration Report for more information.

Award Entitlement Redemption - This report presents a count of redeemed Entitlement Coupons for each Entitlement Deal, and includes charts illustrating entitlement redemption activity. See Award Entitlement Redemption (Trend) Report for more information.

Award Entitlement Summary - This report displays the number of Issued Coupons for each deal within an Entitlement program. See Award Entitlement Summary Report for more information.

Award Program Balance Summary - This report presents summary statistics about current Account balances within each Award Program. See Award Program Balance Summary Report for more information.

Award Program Definitions - This report presents details about each Award Program definition. See Award Program Definition Report for more information.

Award Redemption Rate - This report presents information about the number of Award certificates issued & redeemed for each Card Prefix and Card Series by Program. See Award Redemption Rate Report for more information.

Campaign Management

Promotion Response By Category - This report presents the event response, by Product Hierarchy, for the selected Promotion events, including items purchased. See Promotion Response by Category Report for more information.

Promotion Response By Date - This report summarizes the value of the response, by business date, to the selected Promotion events. See Promotion Response by Date Report for more information.

Promotion Response By Deal - This report summarizes the value of the response, by Deal, to the selected Promotion events. See Promotion Response by Deal Report for more information.

Promotion Response By Location - This report summarizes the value of the response, by Location, to the selected Promotion events. See Promotion Response by Location Report for more information.

Promotion Response By Target - This report presents response data, by Segment Target, for selected Promotion events. See Promotion Response by Target Report for more information.

Promotion Response Detail - This report displays information about the Transactions created in response to each Promotion. See Promotion Response Detail Report for more information.

Promotion Target Detail - This report displays Customer information for the segment targeted in each Promotion. See Promotion Target Details Report for more information.

Promotion Target List - This report presents information about the Segment Targets associated with each Promotion within a Campaign. See Promotion Target List Report for more information.

Promotion Target Segment List - This report displays a list of each Target Segment associated with each Promotion within a Campaign. See Promotion Target Segment List Report for more information.

Card Management

Card Batch Activation Rate - This report displays the activation rate for each Batch within each Card Series on the Card Prefix. See Card Batch Activation Rate Report for more information.

Card Detail - This report presents detailed information about individual Cards defined in the system. See Card Detail Report for more information.

Card Series Activation Rate - This report presents the activation rate for each Card Series created for each Card Type. See Card Series Activation Rate Report for more information.

Customer Management

Address Summary - This report presents a count of Customers by address type, grouped by whether they are primary or valid.See Address Summary Report for more information.

Birthday Summary - This report presents Customer counts by birth month. See Birthday Summary Report for more information.

Customer Alt Key Summary - This report presents counts of the number of Customers by Alternate Key Type. See Customer Alt Key Summary Report for more information.

Customer Assoc Assign By Assoc Role - This report displays contact information for Customers associated to a particular Associate Role. See Customer Associate Assignment by Associate and Role Report for more information.

Customer Contact Email List - This report presents a listing of Customer names, addresses, and primary emails by Signup Location. See Customer Contact Email List Report for more information.

Customer Contact Phone List - This report presents a listing of Customer names, addresses, and phone numbers by Signup Location. See Customer Contact Phone List Report for more information.

Customer Purch By Dept By Year - This report presents a summary of Customer purchase activity by Department and year. See Customer Purchase by Department by Year Report for more information.

Customer Status Summary - This report presents the number of Customer records grouped by Identified/Unidentified (Anonymous Flag) within Active/Inactive (Status Flag). See Customer Status Summary Report for more information.

Gender Summary - This report presents the count of Customers grouped by gender. See Gender Summary Report for more information.

Location Capture Rate - This report presents a count of Customers, by Anonymous Flag, for each signup Location. See Location (Store) Capture Rate Report for more information.

Postal Code Summary - This report presents a count of Customers by Postal Code, filtered on only primary, active, home addresses. See Postal Code Summary Report for more information.

Social Network Summary - This report displays a count of Customers by Social Network, grouped by the Customer's Home Store. See Social Network Summary Report for more information.

State Summary - This report presents a count of active primary address records grouped by state. See State Summary Report for more information.

Summary Report - This report presents totals and percentages of types of addresses, email addresses, and phone numbers for Customers who signed up within a specified date range. See Summary Detail Report for more information.

Item Management

Item Attribute Summary - This report provides a count of Items that are associated with each given Item Attribute and Attribute value. See Item Attribute Summary Report for more information.

Location Operations

Capture Quality Report - This report presents the percentage of validated Customer data, organized by Operator ID, within each Location. See Capture Quality Summary Report for more information.

Customers by Home Location - This report presents a count of Customers for each Home Location. See Customer by Home Location Report for more information.

Shoppers By Location - This report presents Customer count and purchase statistics for each Location. See Shoppers by Location Report for more information.

Sign Up Location by Postal Code - This report presents the number of Customers, by Zip Code (or Postal Code) and on a given date, who signed up at the Location. See [Signup Location (Store) by Postal Code Report](#) for more information.

Sign Up Location By State - This report presents the number of Customers by state, grouped by signup Location. See [Signup Location by State Report](#) for more information.

Signup Location - This report presents the number of Customers by signup Location. See [Signup Location Report](#) for more information.

Signup Location Daily Trend - This report presents Customer counts by signup date and signup Location, and includes a chart illustrating Customer signups by date. See [Signup Location Daily Trend Report](#) for more information.

Loyalty Management

Loyalty Account Detail - This report presents details of the activities performed on each Loyalty Account. See [Loyalty Account Detail Report](#) for more information.

Loyalty Acct Activity Errors - This report presents details of errors for Loyalty Accounts by Program ID. See [Loyalty Account Activity Errors Report](#) for more information.

Loyalty Acct Level Summary - This report presents account level summaries for Loyalty accounts by Program ID. See [Loyalty Account Level Summary Report](#) for more information.

Loyalty Activity Type Summary - This report presents summary information on accounts and Loyalty activity types associated with Program Levels on Loyalty Programs. See [Loyalty Activity Type Summary Report](#) for more information.

Loyalty Activity Type Trend - This report presents summary information on Accounts by Activity Type by business date, organized by Loyalty Program Level and includes charts summarizing Loyalty activity. See [Loyalty Activity Type Trend Report](#) for more information.

Loyalty Issue Rule Impact - This report displays transaction level counts of merchandise associated with purchases against a Loyalty Issue Rule. See [Loyalty Issue Rule Impact Report](#) for more information.

Loyalty Rules Results Summary - This reports displays summary account information by Activity Type for each Loyalty Rule. It is organized by Program levels within the Loyalty Programs. See [Loyalty Rules Results Summary Report](#) for more information.

Loyalty Rules Results Trend - This report presents summary information on accounts by Activity Type by Activity Date for each Loyalty Rule. It is organized by Loyalty Program Level for each Loyalty Program and also includes summary level charts. See [Loyalty Rules Results Trend Report](#) for more information.

Lyl Accounts - Balance Summary - This report presents summary information about the Loyalty Account balances, by Program Level, within each Program. See [Loyalty Account Balance Summary Report](#) for more information.

Lyl Accounts - Last Use - This report presents Loyalty Account summary information within a Loyalty Program Level, grouped by the number of months since last use date and system date. See [Loyalty Account Last Use Summary Report](#) for more information.

Lyl Accounts - Lifecycle - This report presents Loyalty Account summary information within a Loyalty Program Level, grouped by the number of months the accounts have been in use. See [Loyalty Account Life Cycle Summary Report](#) for more information.

Lyl Acct Act Summary - Award - This report presents the earned points from Award rules, by Loyalty Account, within a given period of time. See [Loyalty Account Activity Summary Award Report](#) for more information.

Lyl Acct Act Summary - Issue - This report presents the earned points from Issue rules, by Loyalty Account, within a given period of time. See Loyalty Account Activity Summary Issue Report for more information.

Lyl Program Level Summary - This report presents the current balance statistics for Program Levels within Programs. See Loyalty Program Level Summary Report for more information.

Registry Management

Registry Detail - This report presents detailed information for Gift Registries or Wish Lists. See Registry Detail Report for more information.

Segment Management

- **N-Tile / Range Strata Summary** - This report presents details on Customer Segments broken out by strata. See N-Tile / Range Strata Report for more information.

- **Segment By Home Location** - This report presents a count of Customers, by Home Location, for Customer Segments. See Segment by Home Location Report for more information.

- **Segment By State** - This report presents a count of Customers, by State, for Customer Segment. See Segment by State Report for more information.

- **Segment Count List** - This report presents the details of each Segment run within a specified time period. See Segment Count List Report for more information.

- **Segment Customer Master** - This report presents a listing of information about the Customers in each Segment. See Segment Customer Master Report for more information.

- **Segment Purchase Profile Report** - This report presents counts, by Segment, of individual Items purchased. See Segment Purchase Profile Report for more information.

- **Segment Trend Analysis** - This report presents trend totals for Segments broken out by Run ID, and includes charts illustrating trend totals for Customer Segments. See Segment Trend Analysis Report for more information.

Task Management

Associate Task Detail - This report presents details on customer targeted tasks, by the associate assigned to them. See Associate Task Details Report for more information.

Associate Task Summary - This report presents a summary of the types of Tasks assigned to each Associate, and their current statuses. See Associate Task Summary Report for more information.

Task Summary - This report presents a summary of types of Tasks by their current statuses. See Task Status Summary Report for more information.

Tender Account Management

Tender Account Activity Summary - This report displays tender summary information by Activity Type, by Program. See Tender (Account) Activity Summary Report for more information.

Tender Activity Summary - This report is the same as the Tender Account Activity Summary Report.

Tender Activity Summary By Batch - This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program. See Tender Activity Summary by Batch Report for more information.

Tender Activity Type Trend - This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program, and includes charts illustrating Tender Type activity. See Tender Activity Type Trend Report for more information.

Displaying Report

The Reports page displays the results of a Report run using the specified criteria.
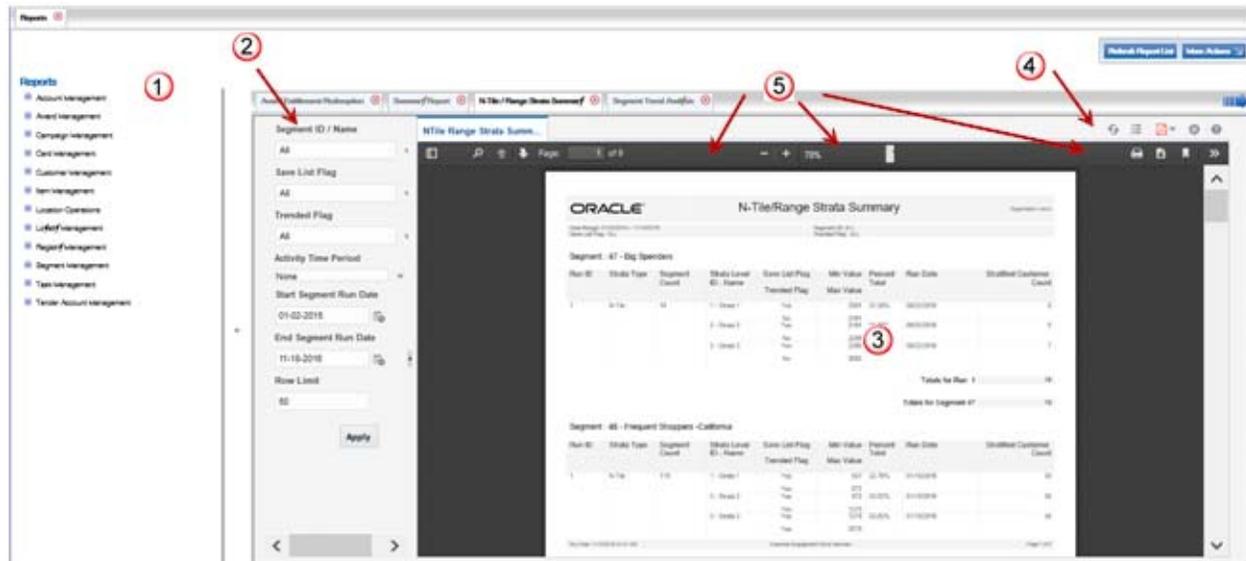
Figure 21-5: Displaying Reports Page

Table 21-2: *Displaying Reports Page Key*

Item	Description
1	**Report Selection** - The list of Reports available for generation See Report Organization for a list of Reports.
2	**Selection Criteria** - The selection criteria for the displayed Report.
3	**Report Contents** - The contents of the generated Report.
4	**BI Publisher Options** - The options available through BI Publisher to refresh, show or hide selection criteria, export the report to different formats, schedule, review job schedules, or share the report. There is also a Help button to open a Help window. See BI Publisher Toolbar for more information.
5	**PDF Options** - The options available through the PDF viewer to search, zoom in or out, print, download, rotate, or view document properties. See the documentation for your PDF viewer for more information.

BI Publisher Toolbar

The BI Publisher toolbar is displayed when a Report is generated.
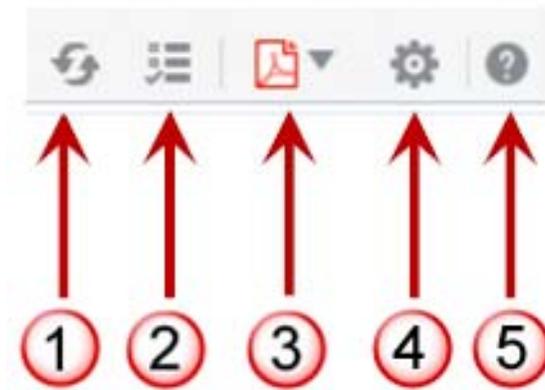
Figure 21-6: BI Publisher Toolbar

Table 21-3: *BI Publisher Toolbar Key*

Item	Description
	Refresh - Refresh the data on the displayed Report.
	Parameters - Show or hide the selection criteria for the Report.
	View Report - Open the View Report Options list to select an output format for the Report. See <u>View Report Options</u> for more information.
	Actions - Select from sending, scheduling, exporting, and job options. See <u>BI Publisher Actions</u>
	Help - Launch the BI Publisher online help.

View Report Options

The View Report Options list includes the formats available for viewing or saving a Report.
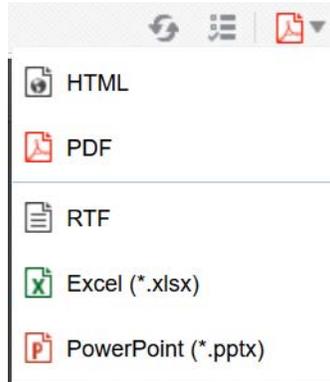
Figure 21-7: View Report Options List

Available options are:

- **HTML** - Display the Report in HTML format.
- **PDF** [DEFAULT] - Display the Report in PDF format.
- **RTF** - Display the Report in Rich Text Format.
- **Excel** - Display the Report in spreadsheet format (.xlsx).
- **PowerPoint** - Display the Report in presentation format (.pptx)

BI Publisher Actions

The BI Publisher Actions list includes the available sharing, scheduling, and publishing options.
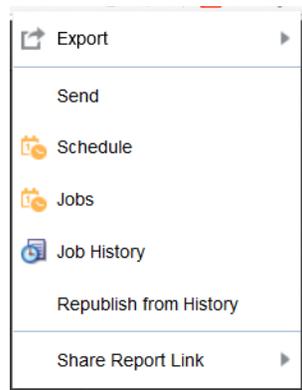
Figure 21-8: BI Publisher Actions

Available actions are:

- **Export** - Opens the View Report Options list.
- **Send** - Enter selection criteria and send the Report for immediate delivery to an email address, printer, or other destination.
- **Schedule** - Schedule generation and distribution of the Report.
- **Jobs** - View and manage scheduled jobs for the Report.

- **Job History** - View and manage completed and running Report jobs.

- **Republish from History** - Select a previously scheduled, completed Report generation for viewing.

- **Share Report Link** - Generate a link to the currently displayed Report.

See the BI Publisher online help for more information on these options.

Report Generation Options and Contents

The generation options and fields included on each report are described below.

Account Management Report

Account Activity Summary Report

This report presents transaction count and value summary information about the program activities, segregated by activity typecode, user, and reason code.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

    - Last Month

    - Last Year

    - Last 30 Days

    - Last 60 Days

    - Last 90 Days

    - This Week

    - This Month

    - This Year

    If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of individual Activity Typecodes with unique user IDs and reason codes for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Program ID - The program ID(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Account Type Code - AWARD, LOYALTY, or TENDER.

- Program ID - The ID and Name identifying a Program for a Card Definition.

- Activity Typecode - Describes the type of activity that took place for the Program during the date range. Possible types include:

  - Activate Account

  - Activate Card

  - Deactivate

  - Expire Coupon

  - Inquiry

  - Issue Award

  - Issue Coupon

  - Issue Entitlement Coupon

  - Issue Points

  - Issue Promo Award Coupon

  - Post Authorization

  - Pre Authorization

  - Redeem

  - Redemption

  - Release Authorization

  - Reload

  - Reset Expiration Date

  - Return

  - Void Transaction

  - Unblock

- Create User - The ID of the user who performed the activity. May also be set to SYSTEM or POS. Set to N/A if no user ID is specified.

- Reason Code - The reason code passed for the activity. Set to N/A if no reason code is specified. If the same activity typecode occurs for multiple activities for the same Program, user ID, and date range, but with different reason codes, each reason code is listed separately on the report.

- Total Trans Count - The total number of transactions for the particular activity typecode for this Program and date range, and the same user ID and reason code.

- Total Trans Value - The total value of the transactions for the particular activity typecode for this Program and date range, and the same user ID and reason code. Some activities, such as card activation or expiration date reset, may not have a transaction value. Other activities, such as issuing an award, can have a negative transaction value.

- Totals for Program: For all activity for the Program during the date range included on the report:

- Total Trans Count - The total number of transactions for this Program and date range.

- Total Trans Value - The total net value of transactions for this Program and date range.

- Totals for Typecode: For each Typecode (AWARD, LOYALTY, or TENDER) included on the report:

  - Total Trans Count - The total number of transactions for this Typecode and date range for all Programs included on the report.

  - Total Trans Value - The total net value of transactions for this Typecode and date range for all Programs included on the report.

- Report Totals:

  - Total Trans Count - The total number of transactions included on the report.

  - Total Trans Value - The total net value of transactions included on the report.

Award Management Reports

Award Account Activity Details Report

This report presents detailed information about activities performed on one or more given Award Accounts.

Selection Criteria:

- Account ID - The ID and Name identifying an Award Account. All Account IDs are selected by default. Optionally, select Search to work with the list of eligible Account IDs, search based on Account ID, or remove Account IDs from the list selected for the report.

- Serial Number - Optionally, enter a card's Serial Number to search for an award account by Serial Number rather than by Account ID.

- Void Flag - Optionally, select Yes or No to select Award Account activity based on whether the activity was voided.

- Activity Type Code - Codes identifying types of activity for an Account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove Activity Type Codes from the list selected for the report. Possible Activity Type Codes include:

  - Account Merge

  - Activate Card

  - Automatic Redeem

  - De-Activate Card

  - Expire Coupon

  - Inquiry

  - Issue Birthday Coupon

  - Issue Coupon

  - Issue Entitlement Coupon

  - Issue Promo Award Coupon

- Issue Signup Coupon

- Notify Coupon Expire

- Redeem

- Reset Expiration Date

- Void

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Activity Type Code - The list of activity type codes selected for the report. Set to ALL if there was no restriction.

- Void Flag - The void flag setting selected for the report. Set to ALL if there was no restriction.

- Account ID - The Account ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Serial Number - The Serial Number(s) selected when generating the report, or set to N/A if there was no restriction.

Detail Information:

Account ID - Indicates the ID number for the account. For each Account ID included on the report, there are two rows of data including the following:

- Workst. ID - Identifies the workstation where the activity took place.

- Award Trans. ID - The transaction ID of the award.

- Void Flag - Set to Yes if the activity was voided; otherwise, set to No.

- Notify Expiry Flag - Set to Yes if an award expiration notification export file has been created that includes the account. Created through the Notify Awards Expire Job.

- Coupon Code - The coupon code affected by the activity, such as a coupon issue or redemption; otherwise, set to N/A.

- Serial Number - Unique serial number for the award.

- Exchange Rate - The rate of exchange between the transaction's original currency and the base currency. Set to 1 if the two currencies are the same. Set to 0 if the activity does not reference a specific amount, such as a card activation.

- Activity Type - Describes the type of activity. Possible types:

  - Account Merge

  - Activate Card

  - Automatic Redeem

  - De-Activate Card

  - Expire Coupon

  - Inquiry

  - Issue Birthday Coupon

  - Issue Coupon

  - Issue Entitlement Coupon

  - Issue Promo Award Coupon

  - Issue Signup Coupon

  - Notify Coupon Expire

  - Redeem

  - Reset Expiration Date

  - Void

- Business Date - The retail business date when the activity occurred.

- Activity Date - The date when the activity took place.

- Loc. ID-Name - The numeric ID and name of the location where the activity occurred.

- Currency Code - The currency code for the transaction. Included only if there is an Activity Amount.

- Ref. Activity ID - The activity ID affected by this activity, if any; otherwise, set to N/A.

- Retail Trans. Seq. - The sequential transaction ID generated by the POS system, if any; otherwise, set to 0 or 1.

- Retail Trans ID - A sequence ID, generated by Customer Engagement, indicating the retail location ID, workstation ID, and transaction sequence number.

- Create User - The ID of the user that created the activity record.

- Create Date - The date when the activity was recorded in the database.

- Comments - The comments entered for the activity, if any; otherwise, set to N/A.

- Error Code - The error code associated with the activity, if any; otherwise, set to N/A.

- Activity Amount - The amount of the activity. Set to 0.00 if there is no associated amount, such as for a card activation.

- Requested Amount - The amount of the transaction in the requested currency. Same as the Activity Amount if there is no currency conversion.

- Totals for the Account ID:

  - Activity Amount - The total amount for activities for the Account ID that are included on the report.

  - Requested Amount - The total requested amount for the Account ID that are included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.

- Report Totals:

  - Activity Amount - The total amount for activities included on the report.

  - Requested Amount - The total requested amount for activities included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.

Award Account Activity Errors Report

This report presents detailed information about transaction errors associated with Award Accounts.

Selection Criteria:

- Program ID - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Serial Number - Optionally, enter a Card's Serial Number to search for a specific Account by Serial Number rather than by Program ID.

- Error Code - Codes identifying types of errors. All error codes are selected by default. Optionally, select Search to work with the list of eligible Error Codes, search based on Error Code, or remove Error Codes from the list selected for the report. Possible Error Codes include:

  - Account Already Active

  - Account Expired

  - Account Inactive

  - Award Program Expired

  - Award Program Not Effective

  - Cannot Void Trans Type

  - Card Expired

- Card Inactive

- Coupon ID Invalid for Expire

- Coupon ID Invalid or Expired

- Coupon Request Amount Invalid

- Coupon Request Date Invalid

- Coupon Request Exceeds Balance

- Coupon Request Neg Amt Invalid

- Currency Exchange Rate Not Found

- Currency ID Missing

- General Error

- Invalid Entitlement Deal

- Invalid Pin Provided

- Loyalty Award Account Error

- Minimum Balance Not Met

- Missing Pin Number

- No Physical Card

- Original Transaction Not Found

- Original Transaction Required

- Original Transaction Voided

- Reloads Not Permitted

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity error records for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Program ID - The ID and Name identifying a Program for a Card Definition. Set to ALL if there was no restriction.

- Error Code - The list of error codes selected for the report. Set to ALL if there was no restriction.

- Serial Number - The serial number(s) selected when generating the report. Set to N/A if there was no restriction.

Detail Information:

- Program ID - The program ID and description.

- Acct.ID - Serial Number - Indicates the ID number and Serial Number for the account.

For each Account ID included on the report, there are two rows of data including the following:

- Activity Type - Describes the type of activity. Possible types:
    - Account Merge
    - Activate Card
    - Automatic Redeem
    - De-Activate Card
    - Expire Coupon
    - Inquiry
    - Issue Birthday Coupon
    - Issue Coupon
    - Issue Entitlement Coupon
    - Issue Promo Award Coupon
    - Issue Signup Coupon
    - Notify Coupon Expire
    - Redeem
    - Reset Expiration Date
    - Void

- Currency Code - The currency code for the transaction. Included only if there is an Activity Amount; otherwise, set to N/A.

- Workst. ID - Identifies the workstation where the activity took place.

- Award Trans. ID - The transaction ID of the award.

- Void Flag - Set to Yes if the activity was voided; otherwise, set to No.

- Coupon ID - The unique identifier for the coupon affected by the activity, such as a coupon issue or redemption; otherwise, set to N/A.

- Exchange Rate - The rate of exchange between the transaction's original currency and the base currency. Set to 1 if the two currencies are the same. Set to 0 if the activity does not reference a specific amount, such as a card activation.

- Retail Trans ID - A sequence ID, generated by Customer Engagement, indicating the retail location ID, workstation ID, and transaction sequence number.

- Create User - The ID of the user that created the activity record.

- Activity Date - The date when the activity took place.

- Create Date - The date when the activity was recorded in the database.

- Error Code - The description of the error that occurred. Possible error codes include:

  - Account Already Active

  - Account Expired

  - Account Inactive

  - Award Program Expired

  - Award Program Not Effective

  - Cannot Void Trans Type

  - Card Expired

  - Card Inactive

  - Coupon ID Invalid for Expire

  - Coupon ID Invalid or Expired

  - Coupon Request Amount Invalid

  - Coupon Request Date Invalid

  - Coupon Request Exceeds Balance

  - Coupon Request Neg Amt Invalid

  - Currency Exchange Rate Not Found

  - Currency ID Missing

  - General Error

  - Invalid Entitlement Deal

  - Invalid Pin Provided

  - Loyalty Award Account Error

  - Minimum Balance Not Met

  - Missing Pin Number

  - No Physical Card

  - Original Transaction Not Found

  - Original Transaction Required

- Original Transaction Voided

- Reloads Not Permitted

- Requested Amount - The amount of the transaction in the requested currency. Same as the Activity Amount if there is no currency conversion.

- Activity Amount - The amount of the activity. Set to 0.00 if there is no associated amount, such as a card activation.

- Totals for the Account ID:

  - Requested Amount - The total requested amount for the Account ID included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.

  - Activity Amount - The total amount for activities for the Account ID included on the report.

- Totals for the Program ID:

  - Requested Amount - The total requested amount for the Program ID that were included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.

  - Activity Amount - The total amount for activities for the Program ID that were included on the report.

- Report Totals:

  - Activity Amount - The total amount for activities included on the report.

  - Requested Amount - The total requested amount for activities included on the report. The same as the total Activity Amount unless any requested amounts were in a different currency.

Award Account Activity Trend Report

This report presents daily counts of Award Transactions, organized by activity type, within a Program.

The report begins with two charts illustrating award account activity. One chart displays total activity counts for each date in the selected time period, while the other displays total activity amounts.

> **Note:** The charts on this report are useful only if you restrict the selection criteria to a single Program ID and Activity Type Code, so you can identify the totals for the type of activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Program ID and Activity Type Code.

Selection Criteria:

- Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Activity Type Code - Codes identifying types of activity for an account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove

Activity Type Codes from the list selected for the report. Possible Activity Type Codes include:

- Account Merge

- Activate Card

- Automatic Redeem

- De-Activate Card

- Expire Coupon

- Inquiry

- Issue Birthday Coupon

- Issue Coupon

- Issue Entitlement Coupon

- Issue Promo Award Coupon

- Issue Signup Coupon

- Notify Coupon Expire

- Redeem

- Reset Expiration Date

- Void

• Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

• Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

• Activity End Date - The last date to include on the report. Defaults to the current date (today).

• Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Activity Type Code - The Activity Type Code(s) selected when generating the report. Set to ALL if there was no restriction.

- Program ID - The ID and Name identifying the Program(s) selected when generating the report. Set to ALL if there was no restriction.

Activity Count Chart - Displays the total Activity Count for each Activity Type Code and Program ID by date.
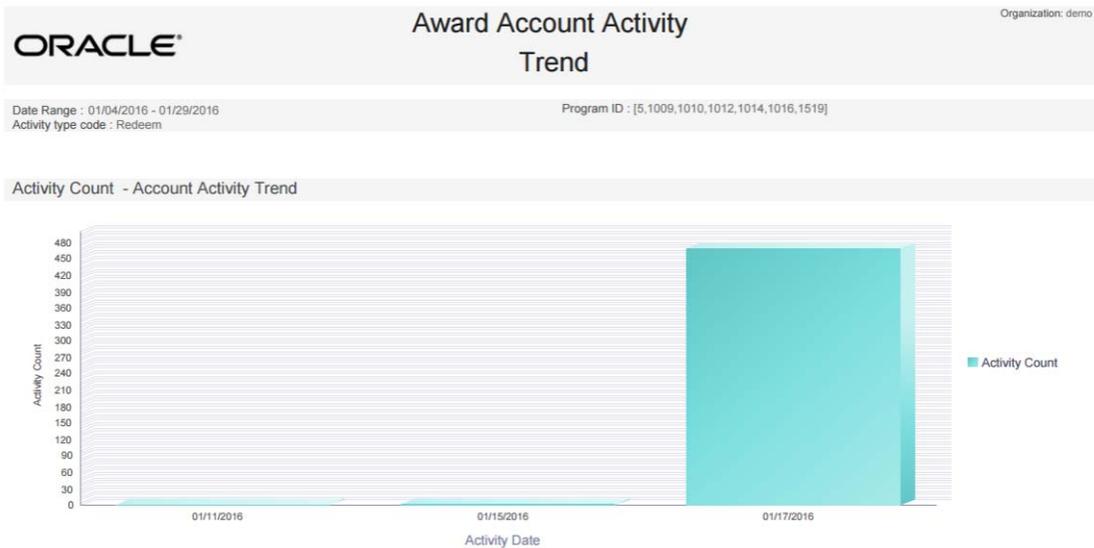
Figure 21-9: Award Account Activity Trend Report - Activity Count Chart

Activity Amount Chart - Displays the total Activity Amount for each Activity Type Code and Program ID by date.

Figure 21-10: Award Account Activity Trend Report - Activity Amount Chart

Detail Information:

- Program ID - The Program ID and description. For each Program:

- Activity Type - An entry for each type of activity that occurred for the program in the time period specified for the report. Possible Activity Type Codes include:

    - Account Merge

    - Activate Card

    - Automatic Redeem

    - De-Activate Card

    - Expire Coupon

    - Inquiry

    - Issue Birthday Coupon

    - Issue Coupon

    - Issue Entitlement Coupon

    - Issue Promo Award Coupon

    - Issue Signup Coupon

    - Notify Coupon Expire

    - Redeem

    - Reset Expiration Date

    - Void

- Activity Date - For each date when the Activity Type took place for the program during the date range selected when generating the report:

    - Activity Count - The total number of times the activity took place for that program, Activity Type, and date.

    - Activity Amount - The total value for the activity that took place for that program, Activity Type, and date. Set to 0.00 if there is no associated amount, such as for a card activation.

- Totals for program and Activity Type - For each Activity Type and Program during the date range selected when generating the report:

    - Activity Count - The total number of times the activity took place for that program.

    - Activity Amount - The total value for the activity that took place for that program.

- Totals for program - For each program included on the report:

    - Activity Count - The total number of activities of any type that took place during the date range selected when generating the report.

    - Activity Amount - The total value of activities of any type that took place during the date range selected when generating the report.

Report Totals:

- Activity Count - The total number of activities of any type, for any program, during the date range selected when generating the report.

- Activity Amount - The total value of activities of any type, for any program, during the date range selected when generating the report.

Award Account Balance Report

This report presents the Account balance available at run time for each Account.

Selection Criteria:

- Program ID - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Serial Number - Optionally, enter a card's Serial Number to search for a particular Serial Number.

- Account ID - The ID identifying an award account. All Account IDs are selected by default. Optionally, enter an account ID to search for a particular account.

- Include Expired Coupons? - Indicates whether to include expired coupons on the report. Set to No by default.

- Limit Records - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of individual Serial Number/Account ID records for the entire report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Include Expired Coupons - Set to Yes if the Include Expired Coupons option was selected when generating the report; otherwise, set to No.

Detail Information:

- Program ID - The ID identifying a Program for a Card Definition.

- Program Name - The name of the Program.

- For each Award Account included on the report:

  - Serial Number - Unique serial number for the Award Account.

  - Account ID - Indicates the ID number for the Account.

  - Number of Coupons - The number of award coupons for the account.

  - Award Balance - The total balance of the coupons.

  - Average Coupon Value - The average value of the coupons (Award Balance / Number of Coupons).

- Program Totals - For each Program included on the report:

  - Number of Coupons - The number of award coupons for the Program.

  - Award Balance - The total balance of the coupons.

  - Average Coupon Value - The average value of the coupons (Award Balance / Number of Coupons).

- Report Totals - For all Award Accounts included on the report:

  - Number of Coupons - The number of award programs included on the report.

- Award Balance - The total balance of the coupons.

- Average Coupon Value - The average value of the coupons (Award Balance / Number of Coupons).

Award Account Error Trend Report

This report presents information about the number of times transaction errors occurred, by date, for each Program.

The report begins with a chart illustrating award error frequency.

> **Note:** The chart on this report is useful only if you restrict the selection criteria to a single Error Code, so you can identify the total for dates when this error occurred. Otherwise, it might be difficult to determine the totals for the same date but a different error.

Selection Criteria:

- Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Error Code - Codes identifying types of errors. All error codes are selected by default. Optionally, select Search to work with the list of eligible Error Codes, search based on Error Code, or remove Error Codes from the list selected for the report. Possible Error Codes include:

  - Account Already Active

  - Account Expired

  - Account Inactive

  - Award Program Expired

  - Award Program Not Effective

  - Cannot Void Trans Type

  - Card Expired

  - Card Inactive

  - Coupon ID Invalid for Expire

  - Coupon ID Invalid or Expired

  - Coupon Request Amount Invalid

  - Coupon Request Date Invalid

  - Coupon Request Exceeds Balance

  - Coupon Request Neg Amt Invalid

  - Currency Exchange Rate Not Found

  - Currency ID Missing

  - General Error

  - Invalid Entitlement Deal

  - Invalid Pin Provided

- Loyalty Award Account Error

- Minimum Balance Not Met

- Missing Pin Number

- No Physical Card

- Original Transaction Not Found

- Original Transaction Required

- Original Transaction Voided

- Reloads Not Permitted

- Activity Time Period - Optionally, select a time period to include errors that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity error records for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Error Code - The Error Code(s) selected when generating the report. Set to ALL if there was no restriction.

- Program ID - The ID and Name identifying a Program selected when generating the report. Set to ALL if there was no restriction.

Error Count Chart - Displays the total Error Count for each Error Code and Program ID by date.
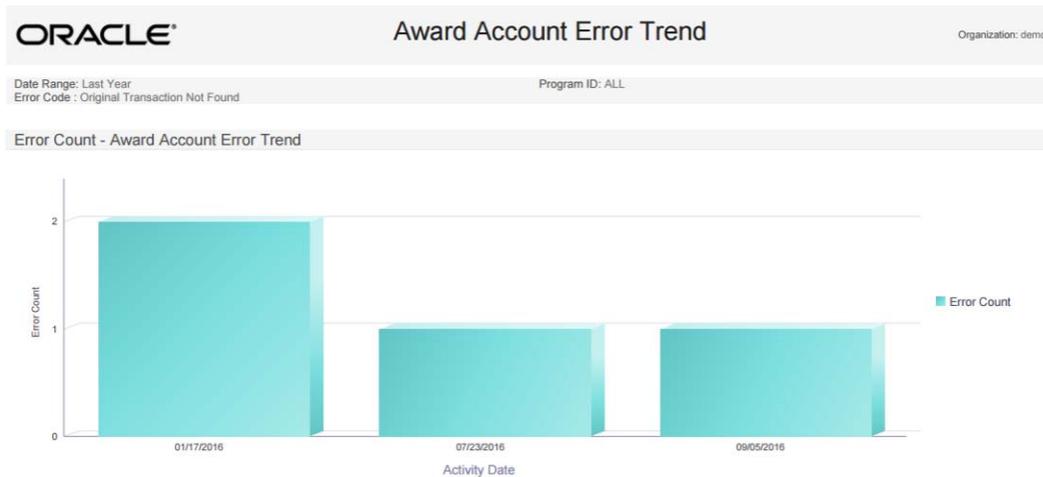
Figure 21-11: Award Error Trend Report - Error Count Chart

Report Contents

Detail Information:

- Program ID - The program ID and description.

- Error Code - The description of the error that occurred. Possible error codes include:

  - Account Already Active

  - Account Expired

  - Account Inactive

  - Award Program Expired

  - Award Program Not Effective

  - Cannot Void Trans Type

  - Card Expired

  - Card Inactive

  - Coupon ID Invalid for Expire

  - Coupon ID Invalid or Expired

  - Coupon Request Amount Invalid

  - Coupon Request Date Invalid

  - Coupon Request Exceeds Balance

  - Coupon Request Neg Amt Invalid

  - Currency Exchange Rate Not Found

  - Currency ID Missing

  - General Error

  - Invalid Entitlement Deal

  - Invalid Pin Provided

  - Loyalty Award Account Error

- Minimum Balance Not Met

- Missing Pin Number

- No Physical Card

- Original Transaction Not Found

- Original Transaction Required

- Original Transaction Voided

- Reloads Not Permitted

- For each error included on the report:

  - Activity Date - The date when the error occurred.

  - Error Count - The total number the errors occurred for that program ID and date.

- Total for each program - The total number of errors for the program that were included on the report.

- Report Totals - The total number of errors that were included on the report.

Award Account Last Use Report

This report presents counts of Accounts within an Award Program, grouped by the number of days between last use date and system date at report run time.

Selection Criteria:

- Program ID - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Limit Records - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of date intervals for the entire report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Program ID - The ID and Name identifying a Program for a Card Definition. Set to ALL if there was no restriction.

Detail Information:

- Program ID - The Program ID and description.

For each program included on the report:

- Date Interval - The range when accounts were last used. Possible ranges are Never Used, Less Than 30 Days, 31 to 60 Days, 61 to 90 Days, or Over 90 Days.

- Number of Accounts - The total number of Award Accounts that were used during the Date Interval.

- Award Balance - The total balance of Award Accounts that were used during the Date Interval.

- Number of Coupons - The total number of Award Coupons that were used during the Date Interval.

- Average Coupon Value - The average coupon value (Award Balance / Number of Coupons) used during the Date Interval.

Totals for Program - For each program and date interval included on the report, the following totals are included:

- Number of Accounts - The total number of Award Accounts for the program, including those Never Used, included on the report.

- Award Balance - The total balance of Award Accounts for the Program included on the report.

- Number of Coupons - The total number of coupons for the Program included on the report.

- Average Coupon Value - The average coupon value (Award Balance / Number of Coupons) for the program included on the report.

Report Totals:

- Number of Accounts - The total number of Award Accounts included on the report.

- Award Balance - The total balance of Award Accounts included on the report.

- Number of Coupons - The total number of coupons included on the report.

- Average Coupon Value - The average coupon value (Award Balance / Number of Coupons) included on the report.

Award Activity By Location Report

This report presents Award activity within a Program, by Location, for a selected date range.

Selection Criteria:

- Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

  The related Card is not indicated here, but is listed on the generated report.

- Location ID / Name - The ID and Name identifying a retail Location. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Activity Type - Codes identifying types of activity for an Award Account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove Activity Type Codes from the list selected for the report. Possible Activity Type Codes include:

  - Account Merge

  - Activate Card

  - Automatic Redeem

  - De-Activate Card

  - Expire Coupon

- Inquiry

- Issue Birthday Coupon

- Issue Coupon

- Issue Entitlement Coupon

- Issue Promo Award Coupon

- Issue Signup Coupon

- Notify Coupon Expire

- Redeem

- Reset Expiration Date

- Void

- **Void Flag** - Optionally, select Yes or No to select award activity based on whether the activity was voided.

- **Activity Time Period** - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- **Activity Start Date** - The first date to include on the report. Defaults to the previous date (yesterday).

- **Activity End Date** - The last date to include on the report. Defaults to the current date (today).

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- **Organization** - The code identifying your organization.

- **Date Range** - The date range selected when generating the report.

- **Void Flag** - The void flag setting selected for the report. Set to ALL if there was no restriction.

Detail Information:

- Program ID - The ID and Name identifying a Program for a Card Definition.

For each Program ID included on the report:

- Retail Location ID - The ID of the location where the activity occurred.

- Retail Location Name - The name of the location where the activity occurred.

- Activity Type - Describes the type of activity. Possible types:

  - Account Merge

  - Activate Card

  - Automatic Redeem

  - De-Activate Card

  - Expire Coupon

  - Inquiry

  - Issue Birthday Coupon

  - Issue Coupon

  - Issue Entitlement Coupon

  - Issue Promo Award Coupon

  - Issue Signup Coupon

  - Notify Coupon Expire

  - Redeem

  - Reset Expiration Date

  - Void

- Void Flag - Set to Yes if the activity was voided; otherwise, set to No.

- Transaction Count - The total number of transactions for the activity included on the report for the Activity Type, Program ID, and Location ID.

- Activity Amount - The total amount of the activity included on the report for the Activity Type, Program ID, and Location ID. Set to 0.00 if there is no associated amount for the Activity Type, such as for a card activation.

- Average Value - The average value (total Activity Amount / Transaction Count) included on the report for the Activity Type, Program ID, and Location ID.

- Totals for the Location ID:

  - Transaction Count - The total number of transactions included on the report for the Program ID and Location ID.

  - Activity Amount - The total amount of transactions included on the report for the Program ID and Location ID.

  - Average Value - The average value (total Activity Amount / Transaction Count) included on the report for the Program ID and Location ID.

- Totals for the Program ID:

  - Transaction Count - The total number of transactions included on the report for the Program ID.

  - Activity Amount - The total amount of transactions included on the report for the Program ID.

- Average Value - The average value (total Activity Amount / Transaction Count) included on the report for the Program ID.

• Report Totals:

  - Transaction Count - The total number of transactions included on the report.

  - Activity Amount - The total amount of transactions included on the report.

  - Average Value - The average value (total Activity Amount / Transaction Count) included on the report.

Award Activity By Program Report

This report presents a summary of Account activities, listed by type, for each Program.

Selection Criteria:

• Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

• Activity Type - Codes identifying types of activity for an award account. All activity type codes are selected by default. Optionally, select Search to work with the list of eligible Activity Type Codes, search based on Activity Type Code, or remove Activity Type Codes from the list selected for the report. Possible Activity Type Codes include:

  - Account Merge

  - Activate Card

  - Automatic Redeem

  - De-Activate Card

  - Expire Coupon

  - Inquiry

  - Issue Birthday Coupon

  - Issue Coupon

  - Issue Entitlement Coupon

  - Issue Promo Award Coupon

  - Issue Signup Coupon

  - Notify Coupon Expire

  - Redeem

  - Reset Expiration Date

  - Void

• Void - Optionally, select Yes or No to select award activity based on whether the activity was voided.

• Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- The Activity Type Code(s) selected when generating the report. Set to ALL if there was no restriction.

- Program ID - The ID and Name identifying a Program selected when generating the report. Set to ALL if there was no restriction.

- Void Flag - The void flag setting selected for the report. Set to ALL if there was no restriction.

Detail Information:

- Program ID - The ID and Name identifying a Program for a Card Definition.

For each Program ID included on the report:

- Activity Type - Describes the type of activity. Possible types:

  - Account Merge

  - Activate Card

  - Automatic Redeem

  - De-Activate Card

  - Expire Coupon

  - Inquiry

  - Issue Birthday Coupon

- Issue Coupon

- Issue Entitlement Coupon

- Issue Promo Award Coupon

- Issue Signup Coupon

- Notify Coupon Expire

- Redeem

- Reset Expiration Date

- Void

- Void Flag - Set to Yes if the activity was voided; otherwise, set to No.

- Transaction Count - The total number of transactions for the activity included on the report for the Activity Type and Program ID.

- Activity Amount - The total amount of the activity included on the report for the Activity Type and Program ID. Set to 0.00 if there is no associated amount for the Activity Type, such as for a card activation or expiration.

- Average Value - The average value (total Activity Amount / Transaction Count) included on the report for the Activity Type and Program ID.

- Totals for the Program ID:

  - Transaction Count - The total number of transactions included on the report for the Program ID.

  - Activity Amount - The total amount of transactions included on the report for the Program ID.

  - Average Value - The average value (total Activity Amount / Transaction Count) included on the report for the Program ID.

- Report Totals:

  - Transaction Count - The total number of transactions included on the report.

  - Activity Amount - The total amount of transactions included on the report.

  - Average Value - The average value (total Activity Amount / Transaction Count) included on the report.

Award Entitlement Expiration Report

This report presents a listing of the expiration dates of issued Entitlement Coupons, providing information on how many are due to expire or have expired.

Selection Criteria:

- Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Include Expired Coupons? - Optionally, select Yes or No to select Entitlement Coupons based on whether the coupons have already expired.

- Row Limit - Optionally, use this field to specify the maximum number of Entitlement Coupons to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Include Expired Coupons - The expiration setting selected for the report. Set to ALL if there was no restriction based on whether the coupons have already expired.

- Program ID - The ID and Name identifying a Program selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Deal ID - The ID identifying a Deal.

- Deal Name - The name of a Deal.

For each Deal included on the report:

- Deal Typecode - Describes the type of Deal. Possible types:
    - Buy X Get Set
    - Buy X Get X
    - Buy X Get Y
    - Fixed Quantity/Price
    - Gift with Purchase
    - Item Price Override
    - Kit
    - Line Item Discount
    - Nth Item Discount
    - Transaction Discount
    - Tiered Discount

- Expiry Date - The date when the Deal expires.

- Coupon Count - The total number of Coupons for the Deal with the same Expiry Date.

- Totals for the Deal ID:
    - Coupon Count - The total number of Coupons for the Deal.

- Report Totals:
    - Coupon Count - The total number of Coupons included on the report.

Award Entitlement Redemption (Trend) Report

This report presents a count of redeemed Entitlement Coupons for each Entitlement Deal.

The report begins with a series of charts illustrating entitlement redemption activity.

> **Note:** The charts on this report are useful only if you restrict the selection criteria to a single Deal, so you can identify the total dates and activities for the Deal. Otherwise, it might be difficult to determine the different totals for the same dates but for different Deals.

Selection Criteria:

- Deal ID / Name - The ID and Name identifying a Deal. All Deals are selected by default. Optionally, select Search to work with the list of eligible Deals, search based on Deal Name, or remove Deals from the list selected for the report.

- Location ID / Name - The ID and Name identifying a retail Location. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Activity Time Period - This criterion is not implemented for this report. All redemptions for the selected Deal and/or Location are eligible for inclusion, regardless of activity date.

- Activity Start Date - This criterion is not implemented for this report.

- Activity End Date - This criterion is not implemented for this report.

- Row Limit - Optionally, use this field to specify the maximum number of Deals with redemptions to include on the report.

Select Apply to apply the selected criteria and generate the report.

Entitlement Redemption Count Chart - Displays the total redemption counts for each date.
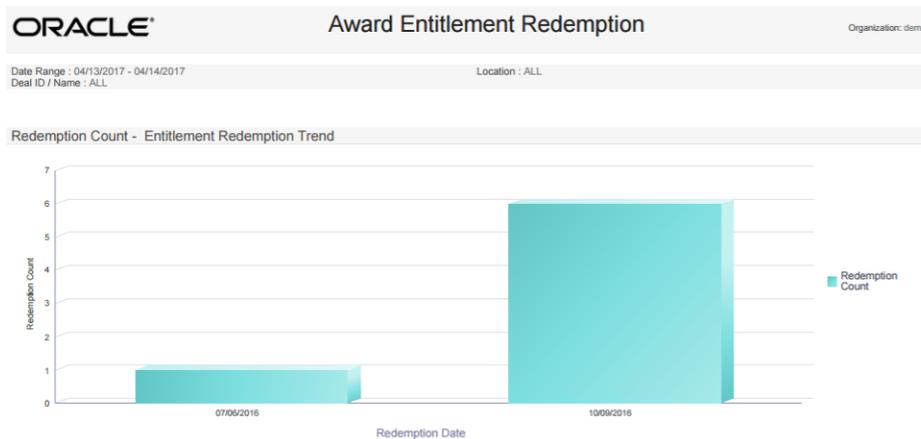
Figure 21-12: Award Entitlement Redemption Report - Entitlement Redemption Count Chart

Entitlement Redemption Percentage Trend Chart - Displays the percentage of the deal redeemed for each date.
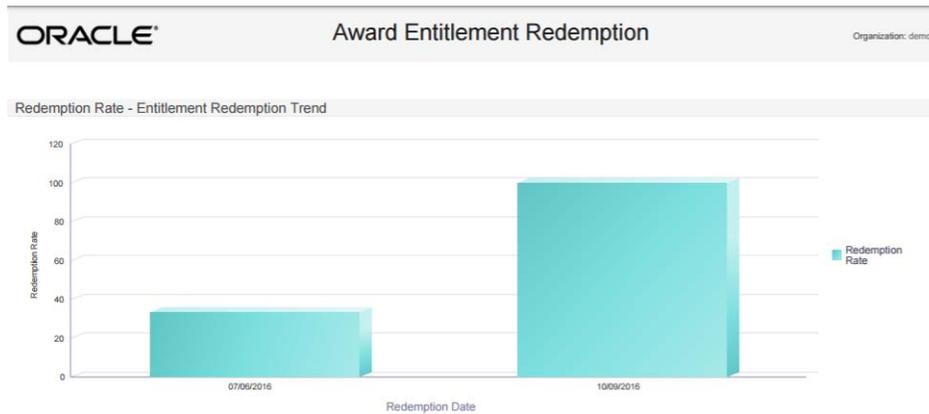
Figure 21-13: Award Entitlement Redemption Report - Entitlement Redemption Percentage Rate Chart

Entitlement Redemption Redeemed Value Trend Chart - Displays the total redeemed value for the deal for each date.
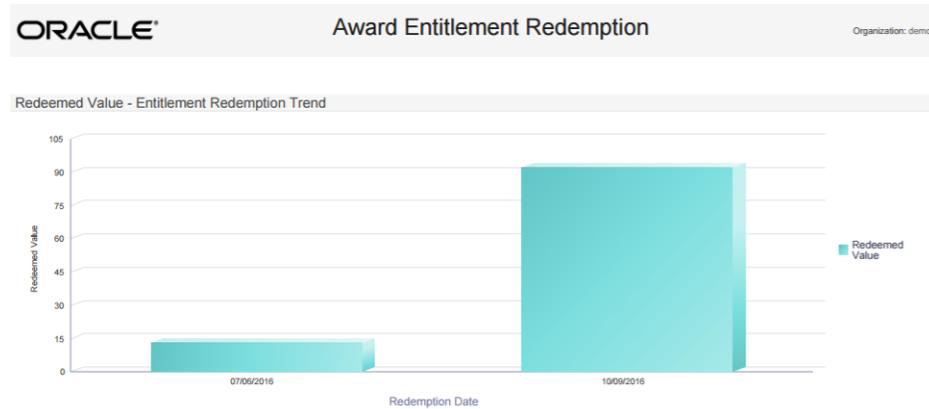
Figure 21-14: Award Entitlement Redemption Report - Entitlement Redemption Redeemed Value Chart

Entitlement Redemption Sales Value Trend Chart - Displays the total sales value for the deal for each date.
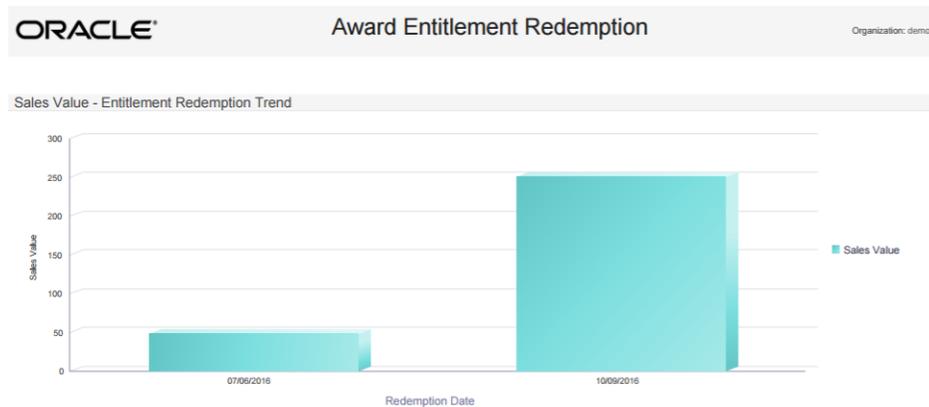
Figure 21-15: Award Entitlement Redemption Report - Entitlement Redemption Sales Value Chart

Entitlement Redemption Discount Rate Trend Chart - Displays the discount percentage for the deal for each date.
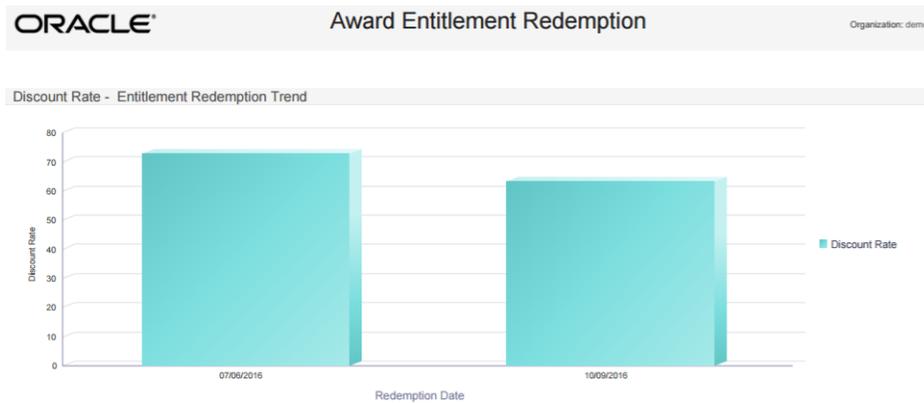
Figure 21-16: Award Entitlement Redemption Report - Entitlement Redemption Discount Rate Chart

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected for the report; however, the redemptions included on the report are not restricted by date range.

- Location - The ID of the Location(s) selected when generating the report. Set to ALL if there was no restriction.

- Deal ID - The ID of the Deal(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Deal ID - The ID identifying a Deal.

- Deal Name - The name of a Deal.

For each Deal included on the report:

- Deal Type - Describes the type of Deal. Possible types:

    - Buy X Get Set

    - Buy X Get X

    - Buy X Get Y

    - Fixed Quantity/Price

    - Gift with Purchase

    - Item Price Override

    - Kit

    - Line Item Discount

    - Nth Item Discount

    - Transaction Discount

    - Tiered Discount

- Status - Indicates if the Deal is currently Active or Inactive.

- Redemption Rate - The Redemption Count / the Issue Count for the Deal on the date, presented as a percentage.

- Discount Rate - The average discount applied for the Deal on the date, presented as a percentage.

- Redeemed Value - The total value of the redemptions for the Deal on the date.

- Sales Value - The total value of all sales for the date.

- Issue Count - The number of times the Deal was issued for the date.

- Redemption Count - The number of times the Deal was redeemed for the date.

- Totals for the Deal Type:

  - Redemption Rate - The Redemption Count / the Issue Count for the Deal and Deal Type, presented as a percentage.

  - Discount Rate - The average discount applied for the Deal and Deal Type, presented as a percentage.

  - Redeemed Value - The total value of the redemptions for the Deal and Deal Type.

  - Sales Value - The total value of all sales for the Deal and Deal Type.

  - Issue Count - The number of times the Deal and Deal Type was issued.

  - Redemption Count - The number of times the Deal and Deal Type was redeemed.

- Totals for the Deal:

  - Redemption Rate - The Redemption Count / the Issue Count for the Deal, presented as a percentage.

  - Discount Rate - The average discount applied for the Deal, presented as a percentage.

  - Redeemed Value - The total value of the redemptions for the Deal.

  - Sales Value - The total value of all sales for the Deal.

  - Issue Count - The number of times the Deal was issued.

  - Redemption Count - The number of times the Deal was redeemed.

- Report Totals:

  - Redemption Rate - The Redemption Count / the Issue Count included on the report, presented as a percentage.

  - Discount Rate - The average discount applied for data included on the report, presented as a percentage.

  - Redeemed Value - The total value of the redemptions included on the report.

  - Sales Value - The total value of all sales included on the report.

  - Issue Count - The number of times the Deals included on the report were issued.

  - Redemption Count - The number of times the Deals included on the report were redeemed.

Award Entitlement Summary Report

This report displays the number of Issued Coupons for each deal within an Entitlement program.

Selection Criteria:

- Activity Time Period - Optionally, select a time period to include Award Entitlement Programs from this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

    - Last Month

    - Last Year

    - Last 30 Days

    - Last 60 Days

    - Last 90 Days

    - This Week

    - This Month

    - This Year

    If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of Award Entitlement Programs to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program ID - The ID and Name identifying an Award Entitlement Program for a Card Definition.

For each Program ID included on the report:

- Deal ID - The ID identifying a Deal.

- Deal Name - The name of a Deal.

For each Deal included on the report:

- Deal Typecode - Describes the type of Deal. Possible types:

    - Buy X Get Set

    - Buy X Get X

    - Buy X Get Y

    - Fixed Quantity/Price

- Gift with Purchase

- Item Price Override

- Kit

- Line Item Discount

- Nth Item Discount

- Transaction Discount

- Tiered Discount

- Status - Indicates whether the Deal is currently Active.

- Issue Count - The total number of transactions where the award was issued.

- Totals for Program ID: The total number of Issues for the Program.

- Report Totals: The total number of Issues included on the report.

Award Program Balance Summary Report

This report presents summary statistics about current Account balances within each Award Program.

Selection Criterion:

- Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

Select Apply to apply the selected criterion and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Programs - The ID and Name identifying the Program(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Program ID - The ID identifying an Award Program for a Card Definition.

- Program Name - The Name identifying the Program.

For each Program ID included on the report:

- Balance Range - The accounts are broken out into three brackets based on their current values:

  - Balance = 0

  - Between 1 and $50

  - Greater than 50

- Number of Accounts - The total number of accounts for the Program in each balance range.

- Total Balance - The total current value of the accounts for the Program in each balance range.

- Average Balance - The average balance for the accounts for the Program in each balance range: the Total Balance / Number of Accounts. Set to 0.00 if the balance range is 0.

The Program Totals for each Program included on the report:

- Number of Accounts - The total number of accounts for the Program.

- Total Balance - The total current value of the accounts for the Program.

- Average Balance - The average balance for the accounts for the Program: the Total Balance / Number of Accounts.

Report Totals:

- Number of Accounts - The total number of accounts for the Programs included on the report.

- Total Balance - The total current value of the accounts for the Programs included on the report.

- Average Balance - The average balance for the accounts for the Programs included on the report: the Total Balance / Number of Accounts.

Award Program Definition Report

This report presents details about each Award Program definition.

Selection Criteria:

- Program ID / Name - The ID and Name identifying a Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include Programs active during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of Programs to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Programs - The ID and Name identifying the Program(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information: Broken out into two rows of data:

- Program ID - The ID and Name identifying a Program for a Card Definition.

- Program Description - The Description of the program.

- Start Date - The start date for the card series.

- End Date - The End Date defined for the program.

- Program Currency Type - The code identifying the currency for the card.

- Initial Balance - The Initial Account Balance defined for the award program for the card.

- Card Required - Set to Yes if Card required was selected for the program; otherwise, set to No.

- Active Flag - Set to Yes if the program is currently active; otherwise, set to No.

- Allow Foreign Currency - Set to Yes if the Allow Foreign Currency was selected for the program; otherwise, set to No.

- Allow Reload - Set to Yes if Allow Reloads is selected for the program; otherwise, set to No.

- Account Expire - Set to 1 if Account Level Expiration is set to Yes for the program; otherwise, set to 0.

- No of Periods - The number of periods, such as months, before the accounts expire.

- Award Expiration - Indicates the criteria, such as Rolling, for expiring the awards for the program; otherwise, set to None.

- No of Periods - The number of periods, such as months, before the awards expire.

- Create Date - The date when the program was created.

- Create User - The user ID of the person who created the program.

- Update Date - The most recent date when the program was updated.

- Update User - The user ID of the person who most recently updated the program.

Award Redemption Rate Report

This report presents information about the number of Award certificates issued & redeemed for each Card Prefix and Card Series by Program.

Selection Criterion:

- Program ID / Name - The ID and Name identifying an Award Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work

with the list of eligible Programs, search based on Program Name, or remove
Programs from the list selected for the report.

- Row Limit - Optionally, use this field to specify the maximum number of rows to
  include on the report. This limit applies to the total number of individual card series
  for the entire report.

Select Apply to apply the selected criterion and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Program ID - The ID and Name identifying the Program(s) selected when generating
  the report. Set to ALL if there was no restriction.

Detail Information:

- Program ID - The ID identifying a Program for a Card Definition.

- Program Name - The Name identifying the Program.

For each Program ID included on the report:

- Card Prefix - The five-digit prefix defined for the prefix identifying a card type.

- Card Series Sequence - The two-digit number identifying a series number for the
  Card Prefix. For each Card Series:

    - Card Display Name - The name defined for the Card Definition.

    - Redemption Rate - The total redemption rate for the Card Series, calculated as
      Total Redeemed Value / Total Issued Value. For example, if the Total Redeemed
      Value is 1000, and the Total Issued Value is 3430, the Redemption rate is .29
      (1000/3430).

    - Total Certificates Issued - The total count of certificates issued for the Card
      Series.

    - Total Issued Value - The total value of the certificates issued for the Card Series.

    - Total Redeemed Value - The total value of certificates redeemed for the Card
      Series.

The totals for each Card Prefix:

- Total Certificates Issued - The total count of certificates issued for the Card Prefix.

- Total Issued Value - The total value of the certificates issued for the Card Prefix.

- Total Redeemed Value - The total value of certificates redeemed for the Card Prefix.

The totals for each Program:

- Total Certificates Issued - The total count of certificates issued for the Program.

- Total Issued Value - The total value of the certificates issued for the Program.

- Total Redeemed Value - The total value of certificates redeemed for the Program.

Report Totals:

- Total Certificates Issued - The total count of certificates included on the report.

- Total Issued Value - The total value of the issued certificates included on the report.

- Total Redeemed Value - The total value of redeemed certificates included on the report.

Campaign Management Reports

Promotion Response by Category Report

This report presents the event response, by Product Hierarchy, for the selected Promotion events, including items purchased. Only promotions that have had response are included.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of individual Items for the entire report. If you specify a Row Limit, any promotions that do not specify items are not included.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Campaign ID - The Campaign ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Program ID - The program ID(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Campaign - The unique number identifying the Campaign.

  - Promotion ID - Name - Type - For each Deal for the Promotion included on the report:

    * Promotion ID - The unique number identifying the Promotion.

    * Name - The name describing the Promotion.

    * Type - Possible Promotion Types are AWARD, COUPON, MESSAGE, and PRODUCT.

  - Item Dept ID - Name - The unique number identifying and name describing the item department, if any; otherwise, set to N/A - N/A.

  - Item Sub Dept ID - Name - The unique number identifying and name describing the item subdepartment, if any; otherwise, set to N/A - N/A.

  - Item Class ID - Name - The unique number identifying and name describing the item class, if any; otherwise, set to N/A - N/A.

  - Item Style ID - The unique number identifying the item style, if any; otherwise, set to N/A.

  - Start Date and End Date - The Start Date and End Date specified for the Promotion.

  - Purchase Quantity - The total number of units purchased through the Promotion.

  - Purchase Total - The total revenue (Direct + Indirect) received from the Promotion Target.

  - Customers Responded - The total number of customers who redeemed a coupon for the Promotion.

  - Average Spent - The Customers Responded / the Purchase Quantity.

- Totals for Promotion:

  - Purchase Quantity - The total number of units purchased through the Promotion.

  - Purchase Total - The total revenue (Direct + Indirect) received from the Promotion Target.

  - Customers Responded - The total number of customers who redeemed a coupon for the Promotion.

  - Average Spent - The Customers Responded / the Purchase Quantity for the Promotion.

- Totals for Campaign:

- Purchase Quantity - The total number of units purchased through the Campaign.

- Purchase Total - The total revenue (Direct + Indirect) received from the Campaign.

- Customers Responded - The total number of customers who redeemed a coupon for the Campaign.

- Average Spent - The Customers Responded / the Purchase Quantity for the Campaign.

• Report Totals:

- Purchase Quantity - The total number of units purchased through all Campaigns on the report.

- Purchase Total - The total revenue (Direct + Indirect) received from all Campaigns on the report.

- Customers Responded - The total number of customers who redeemed a coupon for all Campaigns on the report.

- Average Spent - The Customers Responded / the Purchase Quantity for all Campaigns on the report.

Promotion Response by Date Report

This report summarizes the value of the response, by business date, to the selected Promotion events. Only promotions that have had responses are included.

Selection Criteria

• Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

   If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.

• Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

• Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

    If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

- Row Limit - Optionally, use this field to specify the maximum number of Promotion Type rows to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Campaign ID - The Campaign ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Program ID - The program ID(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name of the Campaign.

- For each Promotion included for the Campaign:

    - Promo ID - Name - The unique number identifying the Promotion, and the name describing the Promotion.

    - Promo Type - Possible types are Award, Coupon, Message, and Product.

    - Start Date, End Date, and Business Date - The Promotion's Start Date, End Date, and the first Business Date when a a redemption occurred.

    - Gross Margin (%) - Gross Profit / Revenue.

    - Number of Responders - The total number of customers who responded to the Promotion.

    - Trans Total - The Total Revenue (Direct + Indirect) received from the Target for the Promotion.

    - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with the Promotion.

    - Markdown Total - The total value of markdowns applied to Indirect line items.

    - Indirect Revenue - The total extended selling price of all line items that were not associated with the Promotion, but included in the transactions.

    - Cost of Goods Sold - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue. Based on the item's Unit Cost.

    - Gross Profit - Total Revenue - Cost Of Goods Sold.

- Totals for Promotion by Business Date:
    - Number of Responders - The total number of customers who redeemed a coupon for the Promotion on the Business Date.
    - Trans Total - The Total Revenue (Direct + Indirect) received from the Target for the Promotion on the Business Date.
    - Direct Revenue - The total extended selling price of all line items sold on the Business Date for the Target that were associated with the Promotion.
    - Markdown Total - The total value of markdowns applied to Indirect line items.
    - Indirect Revenue - The total extended selling price of all line items that were not associated with the Promotion, but were included in the transactions.
    - Cost of Goods Sold - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue. Based on the item's Unit Cost.
    - Gross Profit - Total Revenue - Cost Of Goods Sold.
- Totals for Campaign:
    - Number of Responders - The total number of customers who redeemed a coupon for the Campaign.
    - Trans Total - Total Revenue (Direct + Indirect) received from the Target for the Campaign.
    - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with the Campaign.
    - Markdown Total - The total value of markdowns applied to Indirect line items.
    - Indirect Revenue - The total extended selling price of all line items that were not associated with the Campaign.
    - Cost of Goods Sold - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue.
    - Gross Profit - Total Revenue - Cost Of Goods Sold.
- Report Totals:
    - Number of Responders - The total number of customers who redeemed a coupon for a Promotion included on the report.
    - Trans Total - The Total Revenue (Direct + Indirect) received from the Target for a Promotion included on the report.
    - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with a Promotion included on the report.
    - Markdown Total - The total value of markdowns applied to Indirect line items.
    - Indirect Revenue - The total extended selling price of all line items that were not associated with a Promotion included on the report, but were included in the transactions.
    - Cost of Goods Sold - Total cost of goods sold to the Target for all line items, whether included in Direct or Indirect Revenue. Based on the item's Unit Cost.
    - Gross Profit - Total Revenue - Cost Of Goods Sold.

Promotion Response by Deal Report

This report summarizes the value of the response, by deal, to the selected Promotion events. Only promotions that have had responses are included.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions and Deals may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Deal ID / Name - The ID and Name identifying a Deal. All Deals are selected by default. Optionally, select Search to work with the list of eligible Deals, search based on Deal Name, or remove Deals from the list selected for the report.

- Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

- Row Limit - Optionally, use this field to specify the maximum number of deals to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Campaign ID - The Campaign ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Program ID - The program ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Deal Name - The deal(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name describing the Campaign.

- Promo ID - Name - The unique number identifying the Promotion, and the name describing the Promotion.

- For each Deal included for a Promotion:
  - Start Date and End Date - The Start Date and End Date for the Promotion.
  - Target Name - The name describing the Target. Unidentified is displayed as the Target Name for customers who responded to the Promotion, but do not exist in Oracle Retail Customer Engagement Cloud Services.
  - Coupon Code - The related Coupon Code.
  - Deal ID - Name - The unique numeric identifier for the Deal and the name describing the Deal.
  - Deal Type - Possible deal types include:
    * Transaction Discount
    * Line Item Discount
    * Fixed Quantity/Price
    * Gift with Purchase
    * Buy X Get X
    * Buy X Get Y
    * Tiered Discount
    * Item Price Override
    * Buy X Get Set
    * Nth Item Discount
  - Customers Responded - The total number of customers who responded to the Deal.
  - Transaction Count - The total number of transactions using the Deal.
  - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with the Promotion and Deal.
  - Total Discount - Total amount of the discounts given through the Deal.
  - Average Spent - Direct Revenue / Customers Responded.
  - Average Discount - Total Discount / Customers Responded.

- Average Trans - Direct Revenue / Transaction Count.

- Totals for Promotion:

  - Customers Responded - The total number of customers who responded to the Promotion.

  - Transaction Count - The total number of transactions using the Promotion.

  - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with the Promotion.

  - Total Discount - Total amount of the discounts given through the Promotion.

  - Average Spent - Direct Revenue / Customers Responded.

  - Average Discount - Total Discount / Customers Responded.

  - Average Trans - Direct Revenue / Transaction Count.

- Totals for Campaign:

  - Customers Responded - The total number of customers who responded to the Campaign.

  - Transaction Count - The total number of transactions using the Campaign.

  - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with the Campaign.

  - Total Discount - Total amount of the discounts given through the Campaign.

  - Average Spent - Direct Revenue / Customers Responded.

  - Average Discount - Total Discount / Customers Responded.

  - Average Trans - Direct Revenue / Transaction Count.

- Report Totals:

  - Customers Responded - The total number of customers who responded to a Promotion included on the report.

  - Transaction Count - The total number of transactions using a Promotion included on the report.

  - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with a Promotion included on the report.

  - Total Discount - Total amount of the discounts given through a Promotion included on the report.

  - Average Spent - Direct Revenue / Customers Responded.

  - Average Discount - Total Discount / Customers Responded.

  - Average Trans - Direct Revenue / Transaction Count.

Promotion Response by Location Report

This report summarizes the value of the response, by Location, to the selected Promotion events.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible

Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Location ID / Name - The ID and Name identifying a Location. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

- Row Limit - Optionally, use this field to specify the maximum number of promotion/location combinations to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Campaign ID - The Campaign ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Program ID - The program ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Location ID - The location(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name of the Campaign.

- Promo ID - Name - The unique number identifying the Promotion, and the name describing the Promotion.

- Promo Type - Possible types are Award, Coupon, and Product.

- Loc ID - Name - The unique number identifying the Location, and the name describing the Location.

- Start Date - Start Date for the Promotion.

- End Date - End Date for the Promotion.

- Gross Margin (%) - Gross Profit / Revenue for the Promotion in the Location.

- Customers Responded - The total number of customers who responded to the Promotion at the Location.

- Trans Count - The total number of transactions for the Promotion at the Location.

- Trans Total - The Total Revenue (Direct + Indirect) received for the Promotion at the Location.

- Direct Revenue - The total extended selling price of all line items associated with the Promotion sold to the Target at the Location.

- Markdown Total - The total value of markdowns applied to Indirect line items.

- Indirect Revenue - The total extended selling price of all line items not associated with the Promotion sold to the Target at the Location.

- Cost of Goods Sold - Total cost of goods sold to the Target for all line items at the Location, whether the items are included in Direct or Indirect Revenue. Based on the item's Unit Cost.

- Avg Spent - Trans Total / Customers Responded for the Target at the Location.

- Gross Profit - Trans Total - Cost Of Goods Sold for the Target at the Location.

- Totals for Promotion:

  - Customers Responded - The total number of customers who responded to the Promotion at all Locations.

  - Trans Count - The total number of transactions for the Promotion at all Locations.

  - Trans Total - Total Revenue (Direct + Indirect) received for the Promotion at all Locations.

  - Direct Revenue - The total extended selling price of all line items associated with the Promotion sold to the Target at all Locations.

  - Markdown Total - The total value of markdowns applied to Indirect line items.

  - Indirect Revenue - The total extended selling price of all line items not associated with the Promotion sold to the Target at all Locations.

  - Cost of Goods Sold - Total cost of goods sold to the Target for all line items at all Locations, whether included in Direct or Indirect Revenue.

- Avg Spent - Trans Total / Customers Responded for the Target at all Locations.

- Gross Profit - Trans Total - Cost Of Goods Sold for the Target at all Locations.

- Totals for Campaign:

  - Customers Responded - The total number of customers who responded to the Campaign.

  - Trans Count - The total number of transactions for the Campaign.

  - Trans Total - Total Revenue (Direct + Indirect) received for the Campaign.

  - Direct Revenue - The total extended selling price of all line items associated with the Campaign sold to the Target at all Locations.

  - Markdown Total - The total value of markdowns applied to Indirect line items.

  - Indirect Revenue - The total extended selling price of all line items not associated with the Campaign sold to the Target at all Locations.

  - Cost of Goods Sold - Total cost of goods sold to the Target for all line items at the Location, whether included in Direct or Indirect Revenue.

  - Avg Spent - Trans Total / Customers Responded for the Target of the Campaign at all Locations.

  - Gross Profit - Trans Total - Cost Of Goods Sold for the Target of the Campaign at all Locations.

- Report Totals:

  - Customers Responded - The total number of customers who responded to any of the Campaigns included on the report.

  - Trans Count - The total number of transactions for the Campaigns included on the report.

  - Trans Total - Total Revenue (Direct + Indirect) received for the Campaigns included on the report.

  - Direct Revenue - The total extended selling price of all line items associated with a Campaign included on the report sold to the Target at all Locations included on the report.

  - Markdown Total - The total value of markdowns applied to Indirect line items.

  - Indirect Revenue - The total extended selling price of all line items not associated with the Campaign sold to the Target at all Locations.

  - Cost of Goods Sold - Total cost of goods sold to the Target for all line items at the Location, whether included in Direct or Indirect Revenue.

  - Avg Spent - Trans Total / Customers Responded for the Target of the Campaign at all Locations.

  - Gross Profit - Trans Total - Cost Of Goods Sold for the Target of the Campaign at all Locations.

Promotion Response by Target Report

This report includes response data, by Segment Target, for the selected Promotion events.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

- Row Limit - Optionally, use this field to specify the maximum number of targets to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Campaign ID - The Campaign ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Program ID - The program ID(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name of the Campaign.

- Promo ID - Name - The unique number identifying the Promotion, and the name describing the Promotion.

- Promo Type - Possible types are AWARD, COUPON, MESSAGE, and PRODUCT.

- Start - End Date - The Start Date and End Date for the Promotion.

- Target Name - The name describing the customers targeted.

- Target Count - The total number of customers contacted.

- Customers Responded - The total number of customers in the Target who responded to the Promotion.

- Transaction Count - The total number of transactions for the Promotion for the Target.

- Promo Item Count - The number of units sold of items that were eligible for the Promotion.

- Revenue Total - The total extended selling price of all line items for the Target.

- Average Spent - Revenue Total / Customers Responded for the Target.

- Cost of Goods Sold - Total cost of goods sold to the Target for all line items at the Location, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.

- Markdown Total - The total value of markdowns applied to Indirect line items.

- Totals for Promotion:

  - Target Count - The total number of customers contacted for the Promotion.

  - Customers Responded - The total number of customers in Targets who responded to the Promotion.

  - Transaction Count - The total number of transactions for the Promotion.

  - Promo Item Count - The number of units sold that were eligible for the Promotion.

  - Revenue Total - The total extended selling price of all line items for the Targets for the Promotion.

  - Average Spent - Revenue Total / Customers Responded for the Targets for the Promotion.

  - Cost of Goods Sold - Total cost of goods sold to the Targets for all line items associated with the Promotion, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.

  - Markdown Total - The total value of markdowns applied to Indirect line items.

- Totals for Campaign:

  - Target Count - The total number of customers contacted for the Campaign.

  - Customers Responded - The total number of customers in Targets who responded to the Campaign.

  - Transaction Count - The total number of transactions for the Campaign.

- Promo Item Count - The number of units sold that were eligible for the Campaign.

- Revenue Total - The total extended selling price of all line items for the Targets for the Campaign.

- Average Spent - Revenue Total / Customers Responded for the Targets for the Campaign.

- Cost of Goods Sold - Total cost of goods sold to the Targets for all line items associated with the Campaign, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.

- Markdown Total - The total value of markdowns applied to Indirect line items.

- Report Totals:

  - Target Count - The total number of customers contacted for the Promotions included on the report.

  - Customers Responded - The total number of customers in Targets who responded to the Promotions included on the report.

  - Transaction Count - The total number of transactions for the Promotions included on the report.

  - Promo Item Count - The number of units sold that were eligible for the Promotions included on the report.

  - Revenue Total - The total extended selling price of all line items for the Targets for the Promotions included on the report.

  - Average Spent - Revenue Total / Customers Responded for the Targets for the Promotions included on the report.

  - Cost of Goods Sold - Total cost of goods sold to the Targets for all line items associated with the Promotions included on the1, whether the items included in Direct or Indirect Revenue. Based on the Unit Cost.

  - Markdown Total - The total value of markdowns applied to Indirect line items.

Promotion Response Detail Report

This report includes information about the Transactions created in response to Promotions.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Promotion responses that match the automatically selected criteria.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion

Start Date or Promotion End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name of the Campaign.

- Promo ID - Name - The unique number identifying the Promotion, and the name describing the Promotion.

- Start Date - Start Date for the Promotion.

- End Date - End Date for the Promotion.

- Promo Type - Possible types are AWARD, COUPON, MESSAGE, and PRODUCT.

- Business Date - The business date when the transaction took place.

- Retail Transaction ID - The transaction ID to reference retail location, workstation and transaction sequence number.

- Customer ID - Unique identifier for the customer.

- Customer Name - The customer's first and last name.

- Transaction Total - The total amount of the transaction, including the extended actual prices of items, but excluding any tax.

- Direct Revenue - The total extended selling price of all line items for the transaction that were associated with the Promotion.

- Indirect Revenue - The total extended selling price of all line items for the transaction that were not associated with the Promotion.

- Markdown Total - The total value of markdowns applied to Indirect line items for the transaction.

- Cost of Goods Sold - Total cost of goods sold for all line items on the transaction, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.

- Gross Profit - The Transaction Total - Cost of Goods Sold.

- Gross Margin % - The Gross Profit / Transaction Total, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.

- Totals for Promotion:

  - Transaction Total - The total amount of the transactions for the Promotion, including the extended actual prices of items, but excluding any tax.

  - Direct Revenue - The total extended selling price of all line items for the transactions that were associated with the Promotion.

  - Indirect Revenue - The total extended selling price of all line items for the transactions that were not associated with the Promotion.

  - Markdown Total - The total value of markdowns applied to Indirect line items for the transactions.

  - Cost of Goods Sold - Total cost of goods sold for all line items on the transactions, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.

  - Gross Profit - The Promotion total of The Transaction Total - Cost of Goods Sold.

  - Gross Margin % - The Promotion total Gross Profit / Transaction Total, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.

- Totals for Campaign:

  - Transaction Total - The total amount of the transactions for the Campaign, including the extended actual prices of items, but excluding any tax.

  - Direct Revenue - The total extended selling price of all line items for the transactions that were associated with a Promotion for the Campaign.

  - Indirect Revenue - The total extended selling price of all line items for the transactions that were not associated with a Promotion for the Campaign.

  - Markdown Total - The total value of markdowns applied to Indirect line items for the transactions.

  - Cost of Goods Sold - Total cost of goods sold for all line items on the transactions, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.

  - Gross Profit - The Campaign total of The Transaction Total - Cost of Goods Sold.

  - Gross Margin % - The Campaign total Gross Profit / Transaction Total, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.

- Report Totals:

- Transaction Total - The total amount of the transactions included on the report, including the extended actual prices of items, but excluding any tax.

- Direct Revenue - The total extended selling price of all line items for the transactions associated with a Promotion included on the report.

- Indirect Revenue - The total extended selling price of all line items for the transactions that were not associated with a Promotion.

- Markdown Total - The total value of markdowns applied to Indirect line items for the transaction.

- Cost of Goods Sold - Total cost of goods sold for all line items on the transaction, regardless of whether the items are included in Direct or Indirect Revenue. Based on Unit Cost.

- Gross Profit - The total of The Transaction Total - Cost of Goods Sold that were included on the report.

- Gross Margin % - The total Gross Profit / Transaction Total included on the report, expressed as a percentage. For example, Gross Profit of 18.97 divided by Transaction Total of 56.93 produces a Gross Margin % of .33%.

Promotion Target Details Report

This report displays Customer information for the segment targeted in each Promotion.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions, Targets, and Customers may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to data that match the automatically selected criteria.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Target Name - The name describing the group of Customers targeted for a Promotion. All Targets associated with a selected Promotion are selected by default. Optionally, select Search to work with the list of eligible Targets, search based on Target Name, or remove Targets from the list selected for the report.

- Customer ID / Name - The ID and Name identifying a Customer. All Customers that have been included in a selected Target are selected by default. Optionally, select Search to work with the list of eligible Customers, search based on Customer Name, or remove Customers from the list selected for the report.

- Customer Alternate Key Types - The Alternate Key Types identifying a Customer in an integrated system. All Alternate Key Types are selected by default. Optionally, select Search to work with the list of eligible Alternate Key Types, search based on Alternate Key Type Name, or remove Alternate Key Types from the list selected for the report.

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. Each row includes a Customer record and unique Alternate Key Type. For example, if a customer has three Alternate Keys, the customer is included on the report in three separate rows.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Promotion ID / Name - The Program ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Campaign ID / Name - The Campaign ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Customer Alt Key Type - The Customer alt key type(s) selected when generating the report, or set to N/A if there was no restriction.

- Customer ID / Name - The Customer ID / Name(s) selected when generating the report, or set to ALL if there was no restriction.

- Target Name - The Target name(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name of the Campaign.

- For each unique Customer/Alternate Key included on the report:

    - Promo ID - Name - The unique number identifying the Promotion, and the name describing the Promotion.

    - Target Name - The name describing the customers targeted.

    - Customer ID - Unique identifier for the Customer.

    - Customer Name - Customer Last Name.

    - Alt Key Type - Name identifying the type of Alternate Key. Typically, identifies the integrating system assigning the Alternate Key.

    - Alternate ID - The unique identifier for the Customer in the integrating system.

    - Address - The Customer's primary street address.

    - City - The City for the Customer's primary address.

    - State - The state or province for the Customer's primary address.

    - Postal Code - The postal or ZIP code for the Customer's primary address.

This report does not include any totals.

Promotion Target List Report

This report displays information about the Segment Targets associated with the Promotions within a Campaign.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

If you select a Campaign, one or more Promotions and Targets may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to data that match the automatically selected criteria.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Target Name - The name describing the group of Customers targeted for a Promotion. All Targets are selected by default. Optionally, select Search to work with the list of eligible Targets, search based on Target Name, or remove Targets from the list selected for the report.

- Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

- Row Limit - Optionally, use this field to specify the maximum number of targets to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name of the Campaign.

- Promotion - The unique number identifying the Promotion, and the name describing the Promotion.

- Start Date - The Promotion's Start Date.

- End Date - The Promotion's End Date.

- For each Target included on the report:

  - Target Name - The name describing the customers targeted.

  - Base Target Count - The total number of customers in the Target.

  - Household Filter? - Set to Yes if Customer Household Consolidation was selected for the Target in the Promotion.

  - Household Count - The total number of households in the Target. May be lower than the Base Target Count if Customer Household Consolidation took place for the Target in the Promotion.

  - Filtered? - Set to Yes if filtering took place when selecting members of the Target for the Promotion.

  - Filtered Count - The total number of Customer records from the Target that were selected for the Promotion after filtering.

  - Filter Type - The type of filtering applied, if any. Possible types are Top Sales and Random.

  - Control Group Count - The total number of Customer records from the Target, if any, that were assigned to the Control Group for the Promotion.

  - Control Group Type - The Control Group Type selected, if any. Possible types are Promotion Level and Target Level.

- Totals for Promotion:

  - Base Target Count - The total number of customers for the Promotion.

  - Household Count - The total number of households for the Promotion. May be lower than the Base Target Count if Customer Household Consolidation took place for a Target in the Promotion.

  - Filtered Count - The total number of Customer records that were selected for the Promotion after filtering any of the Targets.

  - Control Group Count - The total number of Customer records that were assigned to a Control Group for the Promotion.

- Totals for Campaign:

  - Base Target Count - The total number of customers for the Campaign.

  - Household Count - The total number of households for the Campaign. May be lower than the Base Target Count if Customer Household Consolidation took place for a Target in the Campaign.

  - Filtered Count - The total number of Customer records that were selected for the Promotions in the Campaign after filtering any of the Targets.

  - Control Group Count - The total number of Customer records that were assigned to a Control Group for the Campaign.

- Report Totals:

  - Base Target Count - The total number of customers for the Targets included on the report.

- Household Count - The total number of households for the Targets included on the report. May be lower than the Base Target Count if Customer Household Consolidation took place for a Target.

- Filtered Count - The total number of Customer records that were selected for the Promotions included on the report after filtering any of the Targets.

- Control Group Count - The total number of Customer records that were assigned to a Control Group for a Target included on the report.

Promotion Target Segment List Report

This report presents the Target Segments associated with Promotions within a Campaign.

Selection Criteria

- Campaign ID / Name - The ID and Name identifying a Campaign. All Campaigns are selected by default. Optionally, select Search to work with the list of eligible Campaigns, search based on Campaign Name, or remove Campaigns from the list selected for the report.

  If you select a Campaign, one or more Promotions may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to data that match the automatically selected criteria.

- Promotion ID / Name - The ID and Name identifying a Promotion. All Promotions are selected by default. Optionally, select Search to work with the list of eligible Promotions, search based on Promotion Name, or remove Promotions from the list selected for the report.

- Promotion Status - The Promotion status to include on the report. All statuses are selected by default. Optionally, select Search to work with the list of eligible statuses, search based on status name, or remove statuses from the list selected for the report.

- Promotion Time Period - Optionally, select a time period to include Promotions that have Start Dates during this period on the report rather than entering a Promotion Start Date or Promotion End Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  If you select a Promotion Time Period, the Promotion Start Date is ignored.

- Promotion Start Date - The first Start Date to include on the report. Defaults to the previous date (yesterday).

- Promotion End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Campaign - The unique number identifying the Campaign, and the name describing the Campaign.

- Promo ID - The unique number identifying the Promotion.

- Promotion Name - The name describing the Promotion.

- Promotion Type - The type of Promotion. Possible types are AWARD, COUPON, MESSAGE, and PRODUCT.

- Status - The current status of the Promotion. Possible statuses are Approved, Clear, Conflict, Saved, and Terminated.

- Start Date - The Start Date for the Promotion.

- End Date - The End Date for the Promotion.

- For each Target:

   - Target Name - The Name describing the Target.

   - Segment ID - A unique numeric identifier for the Segment used as the Target.

   - Segment Name - The Name describing the Segment used as the Target.

This report does not include any totals.

Card Management Reports

Card Batch Activation Rate Report

This report displays the activation rate for each Batch within each Card Series on the Card Prefix.

Selection Criteria

- Card Prefix - The numeric prefix identifying a Card program. All Card Prefixes are selected by default. Optionally, select Search to work with the list of eligible Card Prefixes, search based on Card Prefix, or remove Card Prefixes from the list selected for the report.

   If you select a Card Prefix, one or more Card Series Sequences may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Card Series Sequences that match the automatically selected criteria.

- Card Series Sequence - The sequence number identifying a generated Card Series.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Card Prefix - The Card Prefix(es) selected when generating the report, or set to ALL if there was no restriction.

- Card Series Sequence - The Card Series Sequence number(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Card Prefix - The numeric prefix identifying a Card program.

- Card Series Sequence - The sequence number identifying a generated Card Series.

- Card Series Description - The name describing the Card Series.

- For each Batch in the Card Series Sequence:

  - Batch Number - Batch Name - The unique number identifying a batch, and the name describing the batch.

  - Batch Size - The number of Cards generated in the Batch.

  - Active Flag - Always set to Yes. Batches that are not fully active are not included on the report.

  - Activation Rate - The percentage of the Cards in the Batch that are currently active. For example, if the Batch includes 1000 cards, and 150 are currently active, the Activation Rate is 15%.

  - Card Count - The number of currently active Cards in the Batch.

- Totals for Card Series - The number of currently active Cards in the Series.

- Total for Card Prefix - The number of currently active Cards for the Card Prefix.

- Report Totals - The number of activated Cards for all Card Prefixes on the report.

Card Detail Report

This report presents detailed information about individual Cards defined in the system.

Selection Criteria

- Card Prefix - The numeric prefix identifying a Card program. All Card Prefixes are selected by default. Optionally, select Search to work with the list of eligible Card Prefixes, search based on Card Prefix, or remove Card Prefixes from the list selected for the report.

  If you select a Card Prefix, the remaining criteria may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to Cards that match the automatically selected criteria.

- Card Series Sequence - The sequence number identifying a generated Card Series. All Card Series Sequences are selected by default. Optionally, select Search to work with the list of eligible Card Series Sequences, search based on Card Series Sequence, or remove Card Series Sequences from the list selected for the report.

- Batch Number - The system-assigned number identifying a batch for a Card Series. All Batch Numbers are selected by default. Optionally, select Search to work with the list of eligible Batch Numbers, search based on Batch Number, or remove Batch Numbers from the list selected for the report.

- Serial Number - The system-assigned number identifying a card, where the first 5 positions is the Card Prefix, the next 2 positions is the Card Series Sequence, the next 3 positions is the Batch Number, and the remaining positions uniquely identify the Card within the Prefix, Sequence, and Batch. All Serial Numbers are selected by default. Optionally, select Search to work with the list of eligible Serial Numbers, search based on Serial Number, or remove Serial Numbers from the list selected for the report.

- Card Activation Time Period - Optionally, select a time period to include Cards that have been activated during this period on the report rather than entering a Card Activation Start Date or Card Activation End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Card Activation Time Period, the Card Activation Start Date is ignored.

- Card Activation Start Date - The first Card Activation Date to include on the report. Defaults to the previous date (yesterday).

- Card Activation End Date - The last date to include on the report. Defaults to the current date (today). This criterion is not currently used.

- Row Limit - Optionally, use this field to specify the maximum number of batches to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Card Prefix - The Card Prefix(es) selected when generating the report, or set to ALL if there was no restriction.

- Card Series Sequence - The Card Series Sequence number(s) selected when generating the report, or set to ALL if there was no restriction.

- Serial Number - The Serial Number(s) selected when generating the report, or set to ALL if there was no restriction.

- Batch Number - The Batch Number(s) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Card Prefix - The numeric prefix identifying a Card program.

- Card Series Sequence - Card Name - Card Series Description:

  - Card Series Sequence - The sequence number identifying a generated Card Series.

  - Card Name - The name describing the Series.

  - Card Series Description - The description of the Card Series.

- Batch Number - Batch Display Name - The unique number identifying a batch, and the name describing the batch. The Batch Number defaults to 001, and the Batch Name defaults to [Batch-001].

- Serial Number - The system-assigned number identifying a Card, where the first 5 positions is the Card Prefix, the next 2 positions is the Card Series Sequence, the next 3 positions is the Batch Number, and the remaining positions uniquely identify the Card within the Prefix, Sequence, and Batch.

- Card Number - The unique card number identifying a Card.

- Active Flag - Set to Yes if the Card is currently active, or set to No if the Card has been deactivated. Only Cards that have been activated are included on the report.

- Activation Date - The date when the Card was first activated. If the Card has been deactivated and then reactivated, the original activation date is displayed.

- First Use Date - The first date when there was any activity on the Card.

- Last Use Date - The most recent date when there was any activity on the Card.

There are no totals on the report.

Card Series Activation Rate Report

This report presents the activation rate for each Card Series created for each Card Type.

Selection Criteria

- Card Prefix - The numeric prefix identifying a Card program. All Card Prefixes are selected by default. Optionally, select Search to work with the list of eligible Card Prefixes, search based on Card Prefix, or remove Card Prefixes from the list selected for the report.

Select Apply to apply the selected criterion and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Card Prefix - The Card Prefix(es) selected when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Card Prefix - The numeric prefix identifying a Card program.

- Card Series - The sequence number identifying a generated Card Series.

- Card Name - The name describing the Card.

- Card Series Description - The description of the Card Series.

- Active Series Flag - Always set to Yes. Series are included on the report only if at least some of the generated cards are active.

- Number of Batches - The total number of batches generated for the Card Series that is at least partially active.

- Total Card Count - The total number of cards generated for a Card Series that is at least partially active.

- Active Card Count - The total number of currently active Cards in the Series.

- Activation Rate - The percentage of Cards in the Series that are currently active: Active Card Count / Total Card Count.

- Total for Card Prefix - The totals for the Card Series and Card Prefix. Repeats the Number of Batches, Total Card Count, and Active Card Count from the previous line on the report.

- Report Totals:

  - Number of Batches - The total number of batches for all Card Prefixes included on the report.

  - Total Card Count - The total number of Cards in all batches that are at least partially active for all Card Prefixes included on the report.

  - Active Card Count - The total number of currently active Cards included on the report.

Customer Management Reports

Address Summary Report

This report presents a count of Customers by address type, grouped by whether they are primary or valid.

Selection Criteria

- Valid Flag - Indicates whether an address has failed validation, as described under . Set to All by default. Optionally, select All to display options, including Yes for only Valid addresses or No for only invalid addresses to include in the totals on the report.

- Activity Start Date - Select the first date to include on the report.

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of unique categories, based on combination of Address Type, Valid Address setting, and Address Status, to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Start Range - The Activity Start Date selected when generating the report.

- Valid Flag Setting - The selected setting of the Valid Flag: Yes, No, or ALL.

Detail Information: For each Address Type, Valid Address setting, and Address Status combination for which any addresses were created since the Activity Start Date:

- Address Type - The user-defined address type that was created.

- Valid Address - If <u>Customer Validation</u> is enabled, set to No for any addresses that failed validation; otherwise, set to Yes.

- Address Status - Indicates if the addresses are flagged as Primary or Not Primary.

- Customer Count - The total number of customer records that had an address created matching the category of Address Type, Valid Address setting, and Address Status.

- Percentage - The percentage of all customer address activity on the report that is represented by the category of Address Type, Valid Address setting, and Address Status: Customer Count for the category / Customer Count for the entire report.

- Report Totals:

    - Customer Count - The total number of customers who had addresses created since the Activity Start Date.

    - Percentage - Set to 100%.

Birthday Summary Report

This report presents a count of Customers by birth month. Customers are included in the totals only if their birthday months are known.

Selection Criteria

- Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering an Customer Sign Up Date From or Customer Sign Up Date To. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals, even if their birthdays were not specified until after this range of dates. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

    - Last Month

    - Last Year

    - Last 30 Days

    - Last 60 Days

    - Last 90 Days

    - This Week

    - This Month

    - This Year

    If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- Customer Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals, even if their birthdays were not specified until after this range of dates. Defaults to the previous date (yesterday).

- Customer Sign Up Date To - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of months, starting with January, to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Customer Sign Up Date Range - The date range selected when generating the report.

Detail Information:

- Birth Month - The month when the Customers' birthday occurs.

- Customer Count - The total number of Customer records created during the specified date range that have birthdays during this month.

- Percent - The percentage of all Customer records included on the report with birthdays during this month: Customer Count for the month / Customer Count for the entire report.

- Report Totals:

  - Customer Count - The total number of Customers whose birthdays are known that are included on the report.

  - Percentage - Set to 100%.

Customer Alt Key Summary Report

This report presents counts of Customers by Alternate Key Type. Customers are included in the counts on the report only if they are assigned Alternate Keys.

Selection Criteria

- Alt Key Type Code - The code identifying an alternate key used to identify a customer in a different system. All Alt Key Type Codes are selected by default. Optionally, select Search to work with the list of eligible Alt Key Type Codes, search based on Alt Key Type Code, or remove Alt Key Type Codes from the list selected for the report.

- Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering an Customer Sign Up Date From or Customer Sign Up Date To, even if their Alt Key Type Codes were not specified during this range of dates. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

- This Year

If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- Customer Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals, even if their Alt Key Type Codes were not specified during this range of dates. Defaults to the previous date (yesterday).

- Customer Sign Up Date To - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum Alt Key Type Codes to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Alt Key Type Code - The Alt Key Type Code(s) specified when generating the report, or set to ALL if there was no restriction.

Detail Information:

- Alt Key Typecode - The key identifying a Customer in another system.

- Customer Count - The total number of Customer records created during the specified date range that have this type of Alt Key assigned.

- Key Count - The total number of Alt Keys that are assigned to Customers created during the specified date range. This number might be higher than the Customer Count if, for example, a single Customer was assigned multiple Alt Keys for the same external system.

- Report Totals:

  - Customer Count - The total number of Customer records created during the specified date range that are assigned to any type of Alt Key that are included on the report.

  - Key Count - The total number of Alt Keys assigned to Customers that are included in the totals on the report.

Customer Associate Assignment by Associate and Role Report

This report displays contact information for Customers associated to a particular Associate Role.

Selection Criteria

- Associate - The code identifying a Customer Associate. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.

- Associate Role - The code and name identifying the role that an Associate performs for Customers. All Associate Roles are selected by default. Optionally, select Search

to work with the list of eligible Roles, search based on Role Name, or remove Roles from the list selected for the report.

- Customer ID - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.

- Limit Records - Optionally, use this field to specify the maximum number of Customer Associate assignments to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

Selected search criteria are not included in the report header area.

Detail Information:

- Associate- The Name identifying an Associate.

- Role - The Role in which the Associate is assigned to the Customer. If the Associate is assigned through multiple Roles, the Customer is listed additional times for the Associate under the most recently assigned Role. For example, an Associate was first assigned to the Customer as a Sales Associate, and then assigned to the same Customer as Suit Buyer. The Associate is listed on the report with a Role of Suit Buyer, with the Customer listed twice under this Role.

For each Associate and Role:

- Customer ID - The unique numeric identifier for the Customer.

- First Name - The Customer's first name.

- Last Name - The Customer's last name.

- Address - The first street address line for the Customer's primary address. All address information is blank if there is no primary address identified for the Customer.

- City - The city for the Customer's primary address.

- State - The state for the Customer's primary address.

- Country - The country for the Customer's primary address.

- Phone - The Customer's primary phone number. Blank if no primary phone number is identified for the Customer.

- Email - The Customer's primary email address. Blank if no primary email address is identified for the Customer.

There are no totals on this report.

Customer Contact Email List Report

This report presents a listing of Customer names, addresses, and primary emails by Signup Location.

Selection Criteria

- Sign Up Location - The location where the Customer was enrolled. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Customer ID - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.

- Sign Up Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering an Sign Up Date From or Sign Up Date To. The dates when email addresses were created are not used as criteria. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Time Period, the Sign Up Date From and Sign Up Date To criteria are ignored.

- Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the totals, even if their primary email addresses were not created or updated during this range of dates. Defaults to the previous date (yesterday).

- Sign Up Date To - The last date to include on the report. Defaults to the current date (today).

- Limit Records - Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each mailing address for a customer, including deleted mailing addresses, if the customer has a primary email address.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Customer Sign Up Date - The date range selected for inclusion on the report.

Any additional selection criteria are not included in the report header area.

Detail Information: For each mailing address created for a Customer with a primary email address, including non-primary mailing addresses and deleted mailing addresses:

- Sign Up Location - The Location where the Customer record was created.

- Customer ID - The unique numeric identifier for the Customer.

- Customer Name - The Customer's first and last name.

- Address - The Address Line 1 for the mailing address.

- City and State - The city and state for the Customer's address.

- Postal Code - The postal code for the Customer's address.

- Email Address - The Customer's current primary email address. The same primary email address is listed for each mailing address listed for the Customer.

- Total Sales Amount - The total extended amount of items and miscellaneous charges in the Customer's transaction history.

There are no totals on the report.

Customer Contact Phone List Report

This report presents a listing of Customer names, addresses, and phone numbers by Signup Location.

Selection Criteria

- Customer ID - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.

- Sign Up Location - The location where the Customer was enrolled. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. The dates when phone numbers were created are not used as criteria. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- Customer Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the report. Defaults to the previous date (yesterday).

- Customer Sign Up Date To - The last date to include on the report. Defaults to the current date (today).

- Limit Records - Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each mailing address for a customer, including deleted mailing addresses, regardless of whether the customer has a phone number. If the customer does have a phone number, there is a separate entry on the report for each mailing address/phone number combination. For example, if the customer has two mailing addresses and two phone numbers, there are four entries on the report for the customer.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range- The date range selected for inclusion on the report.

- Customer ID - The customer ID selected for inclusion on the report; otherwise, set to ALL.

- Sign Up Location - The Sign Up Location(s) selected for inclusion on the report; otherwise, set to ALL.

Detail Information: There is a separate entry on the report for each mailing address for a customer, including deleted mailing addresses, regardless of whether the customer has a phone number. If the customer does have a phone number, there is a separate entry on the report for each mailing address/phone number combination. For example, if the customer has two mailing addresses and two phone numbers, there are four entries on the report for the customer:

- Sign Up Location - The Location where the Customer record was created. For each Sign Up Location:
    - Customer ID - Name:
        * Customer ID - The unique numeric identifier for the Customer.
        * Customer Name - The Customer's first and last name.
    - Address - The Address Line 1 for the mailing address.
    - City and State - The city and state for the Customer's address.
    - Postal Code - The postal code for the Customer's address.
    - Phone - The phone number for the Customer.
    - Total Sales Amount - The total extended amount of items and miscellaneous charges in the Customer's transaction history.

There are no totals on the report.

Customer Purchase by Department by Year Report

This report presents a summary of Customer purchase activity by Department and year. Customers are included on the report only if they have purchase activity.

Selection Criteria

- Customer ID - The numeric ID uniquely identifying a customer. Optionally, enter a single Customer ID to generate the report for this Customer. Searching for a Customer here is not supported.

- Department ID / Name - The Department associated with items purchased by Customers. Optionally, select Search to work with the list of eligible Departments,

search based on Department Name, or remove Departments from the list selected for the report.

- Year - The year when purchases occurred. Optionally, enter a single year to generate the report for purchases that occurred in this year. Searching for a year here is not supported.

- Customer Sign Up Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. Customers are included on the report only if they have purchase activity. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- Customer Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the totals. Only Customers with purchase activity are included on the report. Defaults to the previous date (yesterday).

- Customer Sign Up Date To - The last date to include on the report. Only Customers with purchase activity are included on the report. Defaults to the current date (today).

- Limit Records - Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each Customer, Department, and year. For example, if a Customer has purchases in one Department in 2016 and 2017, and purchases in a different Department in 2017, there are three rows for the Customer on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range- The date range selected for inclusion on the report.

- Customer ID - The customer ID specified for inclusion on the report; otherwise, set to ALL.

- Department ID - The Department ID(s) specified for inclusion on the report; otherwise, set to ALL.

Detail Information: For each Customer included on the report:

- Customer - The Customer ID and Name. For the Customer:

    - Item Dept ID - The unique numeric identifier for a Department.

    - Department Description - The description of the Department.

    - Year - The year when the purchase activity occurred for the Customer in the Department.

    - Total Purchase Amount - The total extended amount of items purchased in the Customer's transaction history.

- Totals for Customer - The Total Purchase Amount for the Customer included on the report.

- Report Totals - The Total Purchase Amount included on the report for all Customers.

Customer Status Summary Report

This report presents a summary of Customers grouped whether they are active or inactive, and identified or unidentified.

Selection Criteria

- Active - Indicates whether the Customer is Active, or has been flagged as Inactive. A customer might be inactive through a customer merge, dynamic target job processing, or customer deletes. Optionally, remove one of the Active Flag settings.

- Anonymous Flag - A Customer submitted by an integrating system is flagged as anonymous when there is no identifying information such as name, address, phone number, or email address. Optionally, remove one of the Anonymous Flag settings.

- Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. Customers are included on the report only if they have purchase activity. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

    - Last Month

    - Last Year

    - Last 30 Days

    - Last 60 Days

    - Last 90 Days

    - This Week

    - This Month

    - This Year

    If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- Customer Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Sign Up Date To, are included in the totals. Only Customers with purchase activity are included on the report. Defaults to the previous date (yesterday).

- Customer Sign Up Date To - The last date to include on the report. Only Customers with purchase activity are included on the report. Defaults to the current date (today).

- Limit Records - Optionally, use this field to specify the maximum number of records to include on the report. There is a separate entry on the report for each combination of Active flag setting / Customer Status setting.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected for inclusion on the report.

Detail Information:

- Active - Set to Yes if the totals are for active Customers, or set to No if the totals are for inactive Customers. A Customer might be flagged as inactive through a customer merge, dynamic target job processing, or customer deletes.

- Customer Status - Possible settings:

    - Identified - The Customer's identity is known.

    - Unidentified - The Customer is anonymous. A Customer submitted by an integrating system is flagged as anonymous when there is no identifying information such as name, address, phone number, or email address.

- Customer Count - The total number of Customer records included on the report with the same Active flag and Status settings.

- Percent - The percentage of the Customers included in the totals on the report represented by the Customer Count for this Status and Active flag.

- Status Totals:

    - Customer Count - The total number of Customer records included on the report with the same Status.

    - Percent - The percentage of the Customers included in the totals on the report represented by the Customer Count for this Status.

- Report Totals

    - Customer Count - The total number of Customers included in the totals on the report.

    - Percent - Set to 100.00%.

Gender Summary Report

This report presents a summary of Customers grouped by gender.

Selection Criteria

- Customer Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals.

- Customer Sign Up Date To - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of gender categories to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected for inclusion on the report.

Detail Information:

- Gender - The gender identified for a Customer. N/A indicates that no gender was identified.

- Gender Percentage - The percentage of all Customer records, regardless of when they were created, that have been identified as this gender.

- Customer Count - The total number of Customer records identified as this gender created within the date range selected for the report, even if their gender was identified after this date range.

- Report Totals - The total number of Customers included in the report.

Location (Store) Capture Rate Report

This report presents a count of Customers, by Anonymous Flag, for each Sign Up Location. A Customer submitted by an integrating system is flagged as anonymous when there is no identifying information such as name, address, phone number, or email address.

Selection Criteria

- Location ID / Name - The location where the Customer was enrolled. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Customer Sign Up Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Sign Up Date From or Customer Sign Up Date To. Only Customers with purchase activity are included on the report. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

If you select a Time Period, the Customer Sign Up Date From and Customer Sign Up Date To criteria are ignored.

- Customer Sign Up Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Customer Sign Up Date To, are included in the totals.

- Customer Sign Up Date To - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. Each Location/Anonymous Status counts as a row.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range- The date range selected for inclusion on the report.

- Location ID - The Location ID(s) selected for inclusion on the report; otherwise, set to ALL.

Detail Information:

- Sign Up Store - The numeric code identifying the Location that originated Customers.

- Store Name - The name describing the Location.

- Anonymous Status - Set to No for the total number of Customers created by the Location with identifying information, such as the Customers' names, addresses, phone numbers, and email addresses; otherwise, set to Yes for the total number of Customers created without this identifying information.

- Customer Count - The total number of Customers created at the Location with the indicated Anonymous Status during the Date Range selected for the report.

- Percent - The percentage of Customers included on the report that are represented by this Customer Count.

- Report Totals:

  - Customer Count - The total number of Customers included on the report.

  - Percent - Set to 100.00%.

Postal Code Summary Report

This report presents a count of Customers by Postal Code, filtered on only primary, active, home addresses.

Selection Criteria

- Postal Code - The Postal Code for a Customer's primary address. Optionally, select Search to work with the list of eligible Postal Codes, search based on Postal Code, or remove Postal Codes from the list selected for the report.

- Address Effective Time Period - Optionally, select a time period to include Customers whose primary addresses became effective during this period on the report rather than entering an Address Effective Date From or Address Effective Date To. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select a Time Period, the Address Effective Date From and Address Effective Date To criteria are ignored.

• Address Effective Date From - The first date to include on the report. Primary Customer addresses created on or after this date, and on or before the Address Effective Date To, are included in the totals.

• Address Effective Date To - The last date to include on the report. Defaults to the current date (today).

• Row Limit - Optionally, use this field to specify the maximum number of Postal Codes to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

• Organization - The code identifying your organization.

• Address Effective Date Range- The date range selected for inclusion on the report.

• Postal Code - The Postal Code(s) selected for inclusion on the report; otherwise, set to ALL.

Detail Information:

• Postal Code - The Postal Code for a Customer's primary address. A blank Postal Code might be used to summarize anonymous Customer records.

• Customer Count - The number of Customers who were created or updated with a primary address in this Postal Code during the date range.

• Percent - The percentage of Customers included on the report who were created or updated with a primary address in this Postal Code.

• Report Totals:

- Customer Count - The total number of Customers included on the report.

- Percent - Set to 100.00%.

Social Network Summary Report

This report displays a count of Customers by Social Network, grouped by the Customer's Home Store.

Select Apply to generate the report. There are no selection criteria.

Report Contents

Header Information:

- Organization - The code identifying your organization.

Detail Information:

- Anonymous Flag - The totals are separate based on whether the Anonymous Flag for the Customer is set to Yes or No. A Customer submitted by an integrating system is flagged as anonymous when there is no identifying information such as name, address, phone number, or email address.

- Home Store - The numeric code identifying the Location where the Customer record was created.

- Social Media - The Social Media type, such as FACEBOOK, TWITTER, or LINKEDIN, associated with the Customer through a message from an integrating system.

- Customer Count - The total number of Customers from this Location that are associated with this Social Media type. For example, the report can include a Customer Count of the total number of Customers originating from a specific store Location, associated with TWITTER, that have the Anonymous flag set to No.

- Totals for Anonymous Flag - The total number of Customers from all Locations, associated with all Social Media types, with the same Anonymous Flag setting.

State Summary Report

This report presents a count of active primary address records grouped by state.

Selection Criteria

- Time Period - Optionally, select a time period to include Customers whose primary addresses became effective during this period on the report rather than entering a Customer Address Date From or Customer Address Date To. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Time Period, the Address Effective Date From and Address Effective Date To criteria are ignored.

- Customer Address Date From - The first date to include on the report. Primary Customer addresses created on or after this date, and on or before the Address Effective Date To, are included in the totals.

- Customer Address Date To - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of states to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range- The date range selected for inclusion on the report.

Detail Information:

- State - The U.S. state for a Customer's primary address.

- Customer Count - The number of Customers who were created or updated with a primary address in this state during the date range.

- Percent - The percentage of Customers included on the report who were created or updated with a primary address in this state.

- Report Totals:

    - Customer Count - The total number of Customers included on the report.

    - Percent - Set to 100.00%.

Summary Detail Report

This report presents totals and percentages of types of addresses, email addresses, and phone numbers for Customers who signed up within a specified date range.

Selection Criteria

- Summary Type - The type of information to summarize: Address, E-mail, or Telephone. Optionally, remove one or more summary types.

- Valid Flag - Indicates whether the mailing address, email address, or telephone number was flagged as valid or invalid. Optionally, remove one of the Valid Flag settings.

- Address Type - The address types, such as Home, Business, Not Defined, or Work. Applies to mailing address, email, and telephone totals included on the report. Optionally, remove one or more address types. Note that all address types used for your organization might not be included in this list.

- Customer Signup Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Customer Signup Date From or Customer Signup Date To. Only Customers with active mailing addresses, email addresses, or telephone numbers are included in the totals on the report. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

    - Last Month

    - Last Year

    - Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select a Time Period, the Customer Signup Date From and Customer Signup Date To criteria are ignored.

• Customer Signup Date From - The first date to include on the report. Customer records created on or after this date, and on or before the Signup Date To, are included in the totals. Only Customers with mailing addresses, email addresses, or telephone numbers are included in the report totals. Defaults to the previous date (yesterday).

• Customer Signup Date To - The last date to include on the report. Only Customers with mailing addresses, email addresses, or telephone numbers are included in the report totals. Defaults to the current date (today).

• Limit Records - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each combination of mailing address, email, or telephone type and valid flag setting.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

• Organization - The code identifying your organization.

• Date Range - The date range selected for inclusion on the report.

• Summary Type - The summary type(s) selected for inclusion on the report; otherwise, set to ALL.

• Valid Flag - The Valid Flag setting selected for inclusion on the report; otherwise, set to ALL.

• Type - The mailing address, email, and telephone Type(s) selected for inclusion on the report; otherwise, set to ALL.

Detail Information:

• For each Summary Type (Address, Email, and Telephone):

   - Type - The type of record, such as Home, Business, or Vacation.

   - Valid - Set to Yes if the Customer Count includes valid address, email, or telephone records; otherwise, set to No.

   - Percent - The percentage of the Summary Type represented by the Customer Count. For example, if the Summary Type is Address, the Total for the Summary Type is 100, and the Customer Count for valid Work addresses is 20, the Percent is 20%.

   - Customer Count - The total number of current primary mailing addresses, email addresses, or telephone numbers of this Type and Valid setting.

• Totals for Summary Type - The total number of current, primary mailing addresses, email addresses, or telephone numbers included on the report.

Item Management Reports

Item Attribute Summary Report

This report provides a count of items that are associated with each given Item Attribute and Attribute value.

Selection Criteria

- Attribute - An Attribute assigned to one or more items. Optionally, select Search to work with the list of eligible Attributes, search based on Attribute, or select all Attributes for the report.

- Value - An Attribute Value setting. Optionally, enter a single Value to generate the report for this Attribute Value. Searching for a Value here is not supported.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

Detail Information:

- Attribute Code - The ID and Name for an Item Attribute. For each Attribute Code:

    - Attribute Value - A Value assigned to one or more items for an Attribute.

    - Item Count - The total number of items assigned this Attribute Value.

    - Total Item Count - The total number of items assigned a Value for this Attribute.

Location Operations Reports

Capture Quality Summary Report

This report presents the percentage of validated Customer data, organized by Operator ID, within each Location.

This report includes Customer records created by receiving transactions through an integration. Customer records created through Customer Engagement screens are not included in these totals.

Selection Criteria

- Location - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- Operator ID - A unique number identifying an employee. Optionally, enter a single Operator ID to generate the report for this Operator. Searching for an Operator here is not supported.

- Business Date - Optionally, select a time period to include Customers created during this period on the report rather than entering a Business Start Date or Business End Date. Only Customers created by receiving transactions through an integration are included in the totals on the report. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select a Time Period, the Business Start Date and Business End Date criteria are ignored.

- Business Start Date - The first date to include on the report. Customer records created on or after this date, and on or before the Business End Date, are included in the totals. Defaults to the previous date (yesterday).

- Business End Date - The last date to include on the report. Defaults to the current date (today).

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

Detail Information:

- Location - The ID and Name for a Location. For each Location:

  - Operator ID - A code identifying an employee.

  - Total Trans - The total number of Transactions submitted by the Operator and Location during the date range.

  - Address Valid - The total number of valid addresses for the Total Trans.

  - Address Invalid - The total number of invalid addresses for the Total Trans.

  - Address None - The total number of transactions submitted without addresses.

  - Address % Valid - The Address Valid total / the Total Trans, formatted as a percentage.

  - Phone Valid - The total number of valid phone numbers for the Total Trans.

  - Phone Invalid - The total number of invalid phone numbers for the Total Trans.

  - Phone None - The total number of transactions submitted without phone numbers.

  - Phone % Valid - The Phone Valid total / the Total Trans, formatted as a percentage.

  - Email Valid - The total number of valid email addresses for the Total Trans.

  - Email Invalid - The total number of invalid email addresses for the Total Trans.

  - Email None - The total number of transactions submitted without email addresses.

  - Email % Valid - The Email Valid / the Total Trans, formatted as a percentage.

- Location Totals:

  - Total Trans - The total number of Transactions submitted for the Location during the date range.

  - Address Valid - The total number of valid addresses for the Total Trans.

  - Address Invalid - The total number of invalid addresses for the Total Trans.

  - Address None - The total number of transactions submitted without addresses.

  - Address % Valid - The Address Valid total / the Total Trans, formatted as a percentage.

  - Phone Valid - The total number of valid phone numbers for the Total Trans.

  - Phone Invalid - The total number of invalid phone numbers for the Total Trans.

  - Phone None - The total number of transactions submitted without phone numbers.

  - Phone % Valid - The Phone Valid total / the Total Trans, formatted as a percentage.

  - Email Valid - The total number of valid email addresses for the Total Trans.

  - Email Invalid - The total number of invalid email addresses for the Total Trans.

  - Email None - The total number of transactions submitted without email addresses.

  - Email % Valid - The Email Valid / the Total Trans, formatted as a percentage.

- Report Totals:

  - Total Trans - The total number of Transactions included on the report.

  - Address Valid - The total number of valid addresses for the Total Trans.

  - Address Invalid - The total number of invalid addresses for the Total Trans.

  - Address None - The total number of transactions submitted without addresses.

  - Address % Valid - The Address Valid total / the Total Trans, formatted as a percentage.

  - Phone Valid - The total number of valid phone numbers for the Total Trans.

  - Phone Invalid - The total number of invalid phone numbers for the Total Trans.

  - Phone None - The total number of transactions submitted without phone numbers.

  - Phone % Valid - The Phone Valid total / the Total Trans, formatted as a percentage.

  - Email Valid - The total number of valid email addresses for the Total Trans.

  - Email Invalid - The total number of invalid email addresses for the Total Trans.

  - Email None - The total number of transactions submitted without email addresses.

  - Email % Valid - The Email Valid / the Total Trans, formatted as a percentage.

Customer by Home Location Report

This report presents a count of Customers for each Home Location.

This report includes Customer records created by transactions received through an integration. Customer records created through Customer Engagement screens are not included in these totals.

Selection Criteria

- Location - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- Signup Date Period - Optionally, select a time period to include Customers created during this period on the report rather than entering a Signup Start Date or Signup End Date. Only Customers created by receiving transactions through an integration are included in the totals on the report. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Time Period, the Signup Start Date and Signup End Date criteria are ignored.

- Signup Start Date - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).

- Signup End Date - The last date to include on the report. Defaults to the current date (today).

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Customer Signup Date Range - The date range selected when generating the report.

Detail Information:

- Home Location - The unique numeric identifier for the Location.

- Location Name - The Name describing the Location.

- Customer Count - The total number of Customers created for the Location through transactions receiving during the date range.

- Report Totals - The total number of Customers included on the report.

Shoppers by Location Report

This report presents Customer count and purchase statistics for each Location.

This report includes Customer records created by transactions received through an integration. Customer records created through Customer Engagement screens are not included in these totals.

Selection Criteria

- Location - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- Business Date - Optionally, select a time period to include Customers created during this period on the report rather than entering a Business Start Date or Business End Date. Only Customers created during this time period on transactions received through an integration are included in the totals on the report. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Time Period, the Business Start Date and Business End Date criteria are ignored.

- Business Start Date - The first date to include on the report. Customer records created on or after this date, and on or before the Business End Date, are included in the totals. Defaults to the previous date (yesterday).

- Business End Date - The last date to include on the report. Defaults to the current date (today).

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Business Date - The date range selected when generating the report.

Detail Information:

- Location - The ID and Name for a Location.

- Location Name - The Name describing the Location.

- Customer Count - The total number of Customers created for the Location through transactions received during the date range.

- Total Spent - The total extended amount of items and miscellaneous charges for transactions.

- Number of Transactions - The total number of separate transactions.

- Average Purchase - The Total Spent / the Number of Transactions, presented as a percentage.

- Percent of Total - The Total Spent for the Location / the Total Spent for the report, presented as a percentage.

- Report Totals:

  - Customer Count - The total number of Customers created for the Locations and date range included on the report.

  - Total Spent - The total extended amount of items and miscellaneous charges for transactions included on the report.

  - Number of Transactions - The total number of separate transactions included on the report.

  - Average Purchase - The Total Spent for the report / the Number of Transactions on the report, presented as a percentage.

  - Percent of Total - Set to 100.00%.

Signup Location (Store) by Postal Code Report

This report presents the number of Customers, by date, who signed up at Locations, organized by Postal Code or Zip Code.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- Location ID / Name - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- Postal Code - A postal or Zip code for a Location. Optionally, select Search to work with the list of eligible postal codes, search based on postal code, or select all postal codes for the report.

- Signup Time Period - Optionally, select a time period to include Customers whose records were created during this period on the report rather than entering a Signup Start Date or Signup End Date. Only Customers with active primary addresses are included in the totals on the report. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

- This Week

- This Month

- This Year

If you select a Signup Time Period, the Signup Start Date and Signup End Date criteria are ignored.

- Signup Start Date - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).

- Signup End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Store and Signup Date.

Select Apply to apply the selected criteria and generate the report.

Report Contents

The title listed on the report is Signup Store by Postal Code.

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected for inclusion on the report.

- Location ID - The Location(s) selected for inclusion on the report; otherwise, set to ALL.

- Postal Code - The Postal or Zip Code(s) selected for inclusion on the report; otherwise, set to ALL.

Detail Information:

- Store Name - The Location ID and the Name of the Location. The first Store Name listed might be blank if there were Customers created without assignment to a Location.

- Postal Code - The Postal Code or Zip Code for the Location. Blank if no Postal or ZIP Code is specified for the Location.

- Signup Date - The date when one or more Customer records were created with this store specified as the Signup Location.

- Customer Count - The total number of Customers created for the Store Location on this Signup Date.

- Totals for Location - The total number of Customers created for the Store Location during the date range included on the report.

- Report Totals - The total number of Customers created for the Store Locations and date range included on the report.

Signup Location by State Report

This report presents the number of Customers, by the state or province of the Customers' primary addresses, who signed up at the Location.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- Location ID / Name - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- State - The state or province for a Customer's primary address. Optionally, select Search to work with the list of eligible states or provinces, search based on state or province, or select all states or provinces for the report.

- Signup Date Period - Optionally, select a time period to include Customers whose records were originally created during this period on the report rather than entering a Signup Start Date or Signup End Date.

  Only Customers with active primary addresses are included in the totals on the report, regardless of whether the active primary addresses were defined during the date range. For example, a Customer signs up last month, and a primary address for the Customer is identified this month. When the report is run for last month, the state for the Customer's primary address is included in the report totals.

  Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Signup Date Period, the Signup Start Date and Signup End Date criteria are ignored.

- Signup Start Date - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).

- Signup End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Store and State.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Sign Up Date Range - The date range selected for inclusion on the report.

- Location ID - The Location(s) selected for inclusion on the report; otherwise, set to ALL.

- State - The state or province(s) selected for inclusion on the report; otherwise, set to ALL.

Detail Information:

- Sign Up Store - The unique numeric identifier for the originating Store Location. The first Sign Up Store listed might be blank if there were Customers created without assignment to a Location.

- Store Name - The name identifying the originating Store Location.

- State - The state or province for one or more Customers' current primary addresses. A blank State might indicate that a Customer's primary address was created without a state or province.

- Customer Count - The total number of Customers originating at this Store Location during the date range with active primary addresses in this State.

- Report Totals - The total number of Customers created for the Store Locations during the date range included on the report that have active primary addresses.

Signup Location Report

This report presents a list of Customer totals by Signup Location.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- Location ID / Name - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- Signup Date Period - Optionally, select a time period to include Customers whose records were originally created during this period on the report rather than entering a Signup Start Date or Signup End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select a Signup Date Period, the Signup Start Date and Signup End Date criteria are ignored.

- Signup Start Date - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).

- Signup End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Signup Location.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Signup Date Period - The date range selected for inclusion on the report.

- Location - The Location(s) selected for inclusion on the report; otherwise, set to ALL.

Detail Information:

- Signup Location - The ID and Name identifying an originating Store Location.

- Customer Count - The total number of Customers created during the date range and assigned to this Signup Location.

- Signup Percentage - The Customer Count for the Signup Location / the Customer Count for the entire report, presented as a percentage.

- Report Totals:

  - Customer Count - The total number of Customers created during the date range included on the report.

  - Signup Percentage - Set to 100.00%.

Signup Location Daily Trend Report

This report presents Customer counts by signup date and Location, and includes a chart depicting the signup trend over the selected date range.

> **Note:** The chart on this report is useful only if you restrict the selection criteria to a single Location, so you can identify the total signups for these dates for the Location. Otherwise, it might be difficult to determine the totals for the same date but a different Location.

If you change a Customer's Signup Location, the Customer is included in the totals for the new Signup Location rather than the original Location, but included in the Date Range for the Customer's original signup date.

Selection Criteria

- Location ID / Name - A Location in your organization. Optionally, select Search to work with the list of eligible Locations, search based on Location, or select all Locations for the report.

- Signup Time Period - Optionally, select a time period to include Customers whose records were originally created during this period on the report rather than entering a Signup Start Date or Signup End Date. Set to None by default. Available time periods are:

  - Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select a Signup Time Period, the Signup Start Date and Signup End Date criteria are ignored.

- Signup Start Date - The first date to include on the report. Customer records created on or after this date, and on or before the Signup End Date, are included in the totals. Defaults to the previous date (yesterday).

- Signup End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. There is a separate row on the report for each Signup Location and Signup Date.

Select Apply to apply the selected criteria and generate the report.

Report Contents

The title listed on the report is Signup Store Daily Trend.

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected for inclusion on the report.

- Location - The Location(s) selected for inclusion on the report; otherwise, set to ALL.

Number of Customers - Signup Store Daily Trend: Displays the total count of new Customers for each date and Location.
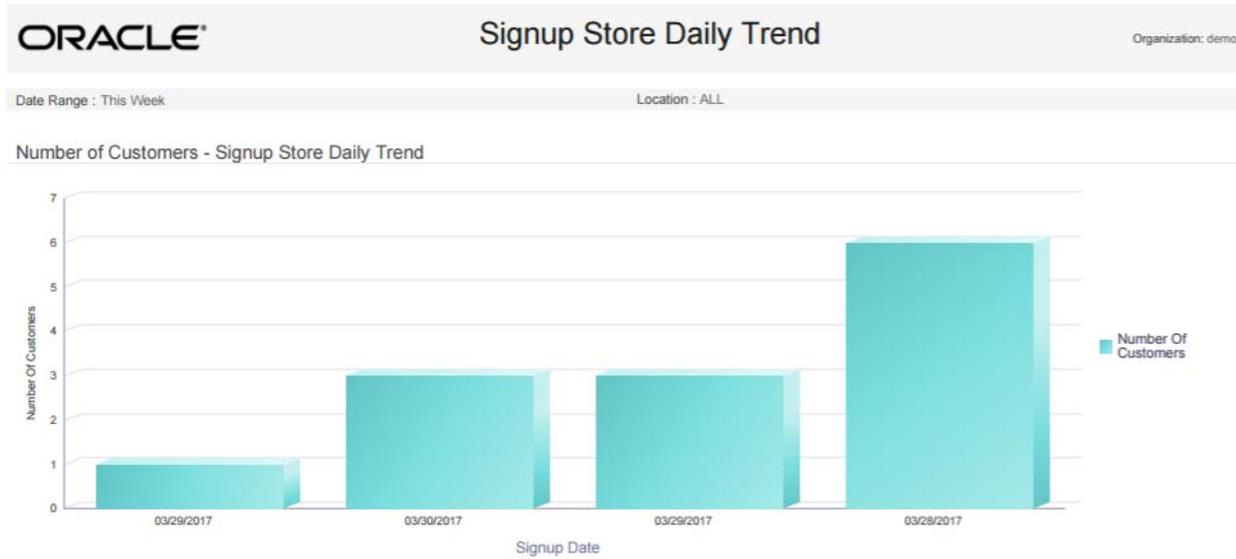
Figure 21-17: Signup Store Daily Trend Report - Number of Customers

Detail Information:

- Signup Location - The Location ID and Name for a Signup Location for one or more Customers. For each Signup Location:

    - Signup Date - The date when one or more Customer records were created.

    - Customer Count - The total number of Customers created on that date and assigned to the Signup Location.

- Totals for Location - The total number of Customers created during the date range and assigned to the Signup Location.

- Report Totals - The total number of Customers created during the date range and included on the report.

Loyalty Management Reports

Loyalty Account Detail Report

This report presents details of the activities performed for individual Loyalty Accounts.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program ID, or remove Programs from the list selected for the report.

    After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Account ID - Optionally, enter an Account ID to include a specific Loyalty Account on the report based on Account ID. Searching for an Account ID here is not supported.

- Serial Number - Optionally, enter a card's Serial Number to include a specific Loyalty Account on the report based on Serial Number. Searching for a Serial Number here is not supported.

- Void Flag - Optionally, select Yes or No to select Loyalty Account activity based on whether the activity was voided.

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity records for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Account ID - The unique identifier for the account associated with the card.

- Serial Number - The unique serial number for the card.

- Loyalty Program - The Loyalty Program for the card.

  For each activity included for an Account ID, Serial Number, and Loyalty Program:

  - Activity ID - A unique identifier for the activity.

- Activity Type - The type of activity performed. Possible types include:

  * Account Merge

  * Activate Account

  * Change Level

  * Deactivate

  * Issue Award

  * Issue Points

  * Point Recovery

- Activity Date - The date when the activity took place.

- Void - Set to Yes if the activity has been voided.

- Escrow Xfer - Set to Yes if the points are escrowed.

- Escrow Xfer Date - The date, if any, when escrowed points are converted to earned points.

- Prog Lvl ID - The unique numeric identifier for the Loyalty Program level.

- Prog Lvl Name - The name describing the Loyalty Program level.

- New Prog Lvl ID - The unique numeric identifier of the new Loyalty Program level assigned, if any.

- Loyalty Rule ID - The unique numeric identifier of the Loyalty rule applied.

- Loyalty Rule Name - The name describing the Loyalty rule.

- Business Date - The business date of the activity.

- Location ID - The unique numeric identifier of the Location where the activity took place.

- Sequence ID - The unique numeric sequence identifier, if any, for the activity.

- Comments - The comments, if any, describing the activity.

- Error Codes - The error codes, if any, associated with the activity.

- Register ID - The unique numeric identifier of the register, if any, where the transaction took place.

- Create Date - The date when the activity record was created.

- Create User - The user ID that created the activity record.

- Loyalty Points - The points earned, awarded, or subtracted through the activity.

• Totals for Account - The total net points earned, awarded, or subtracted for the account during the date range included on the report.

• Report Totals - The total net points earned, awarded, or subtracted for all activity included on the report.

Loyalty Account Activity Errors Report

This report presents details of errors for Loyalty Accounts by Program ID.

Selection Criteria

• Program ID / Name - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible

Programs, search based on Program ID, or remove Programs from the list selected for the report.

- Serial Number - Optionally, enter a card's Serial Number to include a specific Loyalty Account on the report based on Serial Number. Searching for a Serial Number here is not supported.

- Error Code - The code identifying the type of error that occurred. All error codes are selected by default. Optionally, select Search to work with the list of eligible error codes, search based on error code, or remove error codes from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include errors that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of errors for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Error Code - The error code(s) selected for inclusion on the report; otherwise, set to ALL.

- Program ID - The program ID(s) selected for inclusion on the report; otherwise, set to ALL.

- Serial Number - The serial number(s) selected for inclusion on the report; otherwise, set to N/A.

Detail Information:

- Program- The ID and Name of the Loyalty Program.

- Acct ID - The unique identifier for the account associated with the card.

- Program Level ID - Name - The ID and Name of the Loyalty Program level.

- Serial Number - The unique serial number for the card.

    - Activity ID - Type - The unique numeric identifier for the type of activity, and the name of the type. Examples of activity types are Activate or Issue Points.

    - Activity Date - The date when the activity took place.

    - Business Date - The business date when the activity took place.

    - Create Date - The date when the activity record was created.

    - Void Flag - Set to Yes if the transaction was voided.

    - Error Code - The description of the error that occurred.

    - Comments - Any comments entered for the activity.

    - Create User - The user ID that created the activity producing the error.

    - Trans. ID - The unique numeric identifier for the transaction.

    - Loc. ID - The unique identifier for the Location where the activity took place.

    - Number of Points - The number of points associated with the activity.

- Totals for Account - The total net points earned, awarded, or subtracted for activities in error for the account during the date range included on the report.

- Report Totals - The total net points earned, awarded, or subtracted for activities in error included on the report.

Loyalty Account Level Summary Report

This report presents account level summaries for Loyalty accounts by Program ID.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program ID, or remove Programs from the list selected for the report.

    After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Account - Optionally, enter an account number to include a specific Loyalty account on the report. Searching for an account here is not supported.

- Serial Number - Optionally, enter a card's Serial Number to include a specific Loyalty Account on the report based on Serial Number. Searching for a Serial Number here is not supported.

- Activity Time Period - Optionally, select a time period to include totals for cards created during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of accounts for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program ID - The unique numeric identifier for the Program.

- Program Name - The Name describing the Program.

For each account included on the report:

- Program Level - The unique numeric identifier for the current Program level for the account.

- Program Level Name - The Name describing the current Program level for the account.

- Account ID - The unique numeric identifier for the account.

- Serial Number - The unique serial number for the account.

- Earned Points Balance - The current total net earned points balance for the account.

- Bonus Points Balance - The current total net bonus points balance for the account.

- Escrow Points Balance - The current total net escrow points balance for the account.

- Program Totals:

  - Earned Points Balance - The current total net earned points balance for the accounts listed on the report for the Program.

- Bonus Points Balance - The current total net bonus points balance for the accounts listed on the report for the Program.

- Escrow Points Balance - The current total net escrow points balance for the accounts listed on the report for the Program.

• Report Totals:

- Earned Points Balance - The current total net earned points balance for the accounts listed on the report.

- Bonus Points Balance - The current total net bonus points balance for the accounts listed on the report.

- Escrow Points Balance - The current total net escrow points balance for the accounts listed on the report.

Loyalty Activity Type Summary Report

This report presents summary information on accounts and Loyalty activity types associated with Program Levels on Loyalty Programs.

Selection Criteria

• Program ID / Name - The ID and Name identifying a Loyalty Program. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program ID, or remove Programs from the list selected for the report.

After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

• Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

• Activity Type - The type of activity performed for a Loyalty account. Optionally, select Search to work with the list of eligible types, search based on type, or remove types from the list selected for the report. Possible Activity Types are:

- Account Merge

- Activate Card

- Award

- Balance Transfer

- Change Earn Date

- Change Level

- Deactivate Card

- Earn Points

- Expire Points

- Inquiry

- Point Recovery

- Reset Expiration Date

- Return

- Sustain Extension

- Void Transaction

- Activity Time Period - Optionally, select a time period to include totals for activities performed during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activities performed across all Programs and Levels included on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program ID - The unique numeric identifier for the Program.

- Program Name - The Name describing the Program.

For each activity type and Level included on the report:

- Program Level ID - The unique numeric identifier for the Program Level.

- Program Level Name - The Name describing the Program Level.

- Activity Type - The type of activity performed. Possible activity types include:

  - Account Merge

  - Activate Card

  - Award

  - Balance Transfer

- Change Earn Date

- Deactivate Card

- Earn Points

- Expire Points

- Inquiry

- Issue

- Point Recovery

- Reset Expiration Date

- Return

- Sustain Extension

- Void Transaction

• Number of Accounts - The total number of accounts that had this type of activity for the Program Level during the date range.

• Number of Points - The total number of points for the activity type. Can be a negative number, such as for an award, or can be 0.00, such as for an inquiry.

• Average Points - The Number of Points / the Number of Accounts.

• Program Totals:

- Number of Accounts - The total number of accounts that had this type of activity for all Program Levels

- Number of Points - The total number of points for all included activities for the Program.

- Average Points - The Number of Points / the Number of Accounts.

• Report Totals:

- Number of Accounts - The total number of accounts included on the report.

- Number of Points - The total number of points for all activities included on the report.

- Average Points - The Number of Points / the Number of Accounts.

Loyalty Activity Type Trend Report

This report presents summary information on Accounts by Activity Type by business date, organized by Loyalty Program Level.

The report begins with three charts summarizing loyalty activity. One chart displays total activity counts for each date in the selected time period, another displays the number of points involved in the activities for each date, and the third displays average points for each date.

> **Note:** The charts on this report are useful only if you restrict the selection criteria to a single Program ID, Program Level ID, and Activity Type, so you can identify the totals for the type of activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Program ID, Program Level ID, and Activity Type.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Activity Type - Codes identifying types of activity for a Loyalty account. All activity types are selected by default. Optionally, select Search to work with the list of eligible Activity Types, search based on Activity Type, or remove Activity Types from the list selected for the report. Possible Activity Types are:

  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer
  - Change Earn Date
  - Change Level
  - Deactivate Card
  - Earn Points
  - Expire Points
  - Inquiry
  - Point Recovery
  - Reset Expiration Date
  - Return
  - Sustain Extension
  - Void Transaction

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of records by Business Date, Program Level, Activity Type, and Activity Date for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Program ID - The numeric ID for a Loyalty Program selected when generating the report. Set to ALL if there was no restriction.

- Program Level - The numeric ID for a Loyalty Level selected when generating the report. Set to ALL if there was no restriction.

- Activity Type - The Activity Type(s) selected when generating the report. Set to ALL if there was no restriction.

Number of Accounts Chart - Displays the total number of Loyalty accounts for which there was activity for each date.

Figure 21-18: Loyalty Activity Type Trend Report - Number of Accounts Chart

Number of Points Chart - Displays the total number of points involved in activities for each date.

Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the amount of Points deducted is 500, the number of points depicted on this graph is 500 rather than -500.
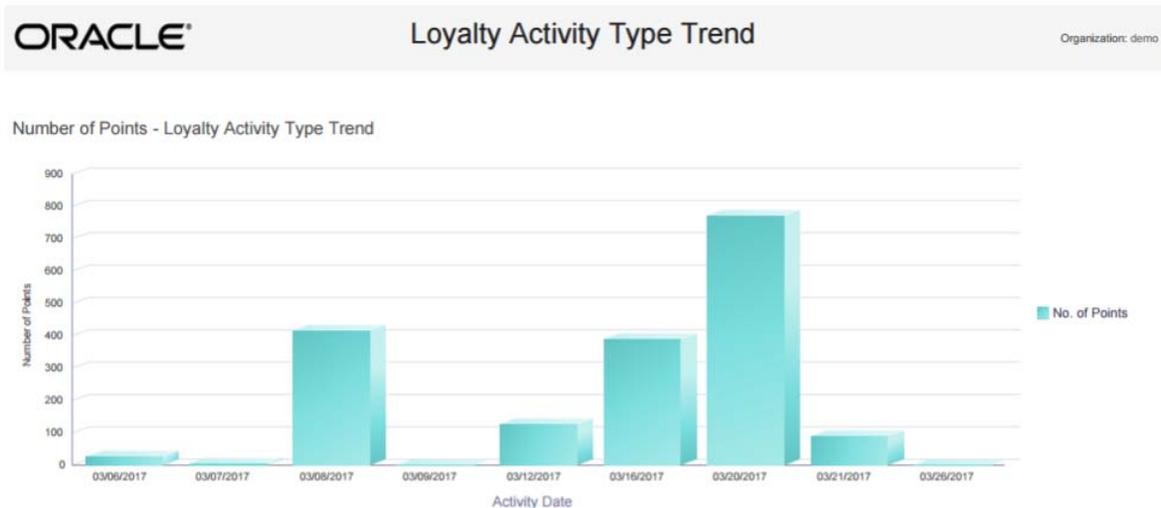
Figure 21-19: Loyalty Activity Type Trend Report - Number of Points Chart

Average Points Chart - Displays the average number of points involved in activities for each date.

Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the average amount of Points deducted is 100, the average amount of points depicted on this graph is 100 rather than -100.

Detail Information:

- Program - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

For each activity type and Level included on the report:

- Program Level ID - Name - The unique numeric identifier for the Program Level, and the Name describing the Program Level.

- Activity Type - The type of activity performed. Possible activity types include:
  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer
  - Change Earn Date
  - Deactivate Card
  - Earn Points
  - Expire Points
  - Inquiry
  - Issue
  - Point Recovery
  - Reset Expiration Date
  - Return
  - Sustain Extension
  - Void Transaction
- Business Date - The business date when the activity type occurred for the Loyalty Program and Level.
- Number of Accounts - The total number of accounts that had this type of activity for the Program Level on this date.
- Number of Points - The total number of points for the activity type on this date. A negative number, such as for an award, is expressed as an absolute value.
- Average Points - The Number of Points / the Number of Accounts.
- Totals for Activity Type:
  - Number of Accounts - The total number of accounts that had this type of activity for the Program Level during this date range.
  - Number of Points - The total number of points for the activity type for this Program Level during this date range. A negative number, such as for an award, is expressed as an absolute value.
  - Average Points - The Number of Points / the Number of Accounts.
- Totals for Program Level:
  - Number of Accounts - The total number of accounts that had activity for the Program Level during this date range.
  - Number of Points - The total number of points for this Program Level during this date range. A negative number, such as for an award, is expressed as an absolute value.
  - Average Points - The Number of Points / the Number of Accounts.
- Totals for Program:
  - Number of Accounts - The total number of accounts that had activity for the Program.

- Number of Points - The total number of points for all included activities for the Program.

- Average Points - The Number of Points / the Number of Accounts.

• Report Totals:

- Number of Accounts - The total number of accounts included on the report.

- Number of Points - The total number of points for all activities included on the report. Calculated by adding absolute values.

- Average Points - The Number of Points / the Number of Accounts.

Loyalty Issue Rule Impact Report

This report displays transaction level counts of merchandise associated with purchases against a Loyalty Issue Rule.

Selection Criteria

• Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

After you make a Program ID / Name selection, clear the Loyalty Rule ID that is automatically selected as a result and reset Loyalty Rule IDs as needed.

• Loyalty Rule ID / Name - The ID and Name identifying a Rule that controls issuing points for a Loyalty Level. Optionally, select Search to work with the list of eligible Rules, search based on Rule ID and Name, or remove Rules from the list selected for the report.

• Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

• Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

• Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of transactions that triggered the application of a Rule included on the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Program Level ID - The numeric ID(s) for Loyalty Level(s) selected when generating the report. Set to ALL if there was no restriction.

- Loyalty Rule ID - The numeric ID(s) for Rule(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Program Level ID - The unique identifier for a Loyalty Program Level.

- Loyalty Rule ID - Description - The unique identifier for a Loyalty Rule that controls issuing points, and the Description of the Rule.

- Item Dept ID - The unique identifier for the Department associated with the Item on the transaction.

- Item Class ID - The unique identifier of the Item Class that further defines the Item on the transaction.

- RTL Trans ID - A unique identifier for the retail transaction, referencing the Location and Workstation as well as the transaction sequence number.

- Number of Accounts - The number of Accounts associated with the transaction ID. Typically set to 1.

- Transaction Count - The number of transactions associated with the transaction ID. Typically set to 1.

- Item Extended Amount - The extended selling price of the items on the transaction.

- Totals for Rule:

    - Number of Accounts - The number of Accounts associated with the transactions where the Rule was applied.

    - Transaction Count - The number of transactions where the Rule was applied.

    - Item Extended Amount - The total extended selling price of the items on the transactions.

- Totals for Program Level ID:

    - Number of Accounts - The number of Accounts associated with the transactions where a Rule for the Program Level was applied. If an Account was associated with multiple transactions for the Program, it is included for each transaction.

    - Transaction Count - The number of transactions where a Rule for the Program was applied.

    - Item Extended Amount - The total extended selling price of the items on the transactions.

- Report Total:

- Number of Accounts - The number of Accounts for all transactions included on the report. If an Account was associated with multiple transactions on the report, it is included for each transaction.

- Transaction Count - The number of transactions included on the report.

- Item Extended Amount - The total extended selling price of the items on the transactions.

Loyalty Rules Results Summary Report

This reports displays summary account information by Activity Type for each Loyalty Rule. It is organized by Program levels within the Loyalty Programs.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Rule ID / Name - The ID and Name identifying a Rule that controls issuing points for a Loyalty Level. Optionally, select Search to work with the list of eligible Rules, search based on Rule ID and Name, or remove Rules from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of activity types that triggered the application of a Rule included on the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program ID - The unique numeric identifier for the Loyalty Program.

- Program Name - The Name describing the Loyalty Program.

- Program Level ID - The unique numeric identifier for the Loyalty Program Level.

- Program Level Name - The name describing the Loyalty Program Level.

- Loyalty Rule ID - The unique numeric identifier for the Loyalty Program Rule.

- Loyalty Rule Name - The name describing the Loyalty Program Rule.

- Activity Type - The type of activity that triggered the application of the Rule.

- Number Of Accounts - The number of Accounts for which the Rule was applied for the Activity Type.

- Number of Points - The total number of points applied through the Rule.

- Average Points - The Number of Points / the Number of Accounts.

- Program Totals:

  - Number of Accounts - The number of Accounts for which the Rule was applied for the Program.

  - Number Of Points - The total number of points applied for the Program.

  - Average Points - The Number Of Points / the Number of Accounts.

- Report Totals:

  - Number of Accounts - The number of Accounts for all activities included on the report.

  - Number Of Points - The number of points for all Accounts and activities included on the report.

  - Average Points - The total Number Of Points / the total Number of Accounts.

Loyalty Rules Results Trend Report

This report presents summary information on accounts by Activity Type by Activity Date for each Loyalty Rule. It is organized by Loyalty Program Level for each Loyalty Program.

The report begins with three charts illustrating loyalty rules results activity. One chart displays total number of accounts with rules activity for each date in the selected time

period, another displays the number of points involved in the rules results activities for each date, and the third displays average points used for rules results for each date.

> **Note:** The charts on this report are useful only if you restrict the selection criteria to a single Program ID, Program Level ID, and Activity Type, so you can identify the totals for the type of activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Program ID, Program Level ID, and Activity Type.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Activity Type - Codes identifying types of activity for a Loyalty account. All activity types are selected by default. Optionally, select Search to work with the list of eligible Activity Types, search based on Activity Type, or remove Activity Types from the list selected for the report. Possible Activity Types are:
  - Account Merge
  - Activate Card
  - Award
  - Balance Transfer
  - Change Earn Date
  - Change Level
  - Deactivate Card
  - Earn Points
  - Expire Points
  - Inquiry
  - Issue
  - Point Recovery
  - Reset Expiration Date
  - Return
  - Sustain Extension
  - Void Transaction

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:
  - Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of rules applied for all Program Levels, Activity Types, and Activity Dates for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Program - The numeric ID for a Loyalty Program selected when generating the report. Set to ALL if there was no restriction.

- Program Level - The numeric ID for a Loyalty Level selected when generating the report. Set to ALL if there was no restriction.

- Activity Type - The Activity Type(s) selected when generating the report. Set to ALL if there was no restriction.

Number of Accounts Chart - Displays the total number of Loyalty accounts for which rules were applied for each date.

Figure 21-20: Loyalty Rules Results Trend Report - Number of Accounts Chart

Number of Points Chart - Displays the total number of points involved in rules results for each date.

Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the amount of Points deducted is 500, the number of points depicted on this graph is 500 rather than -500.

Figure 21-21: Loyalty Rules Results Trend Report - Number of Points Chart

Average Points Chart - Displays the average number of points involved in rules results for each date.

Negative numbers are presented as absolute values. For example, if the Activity Type is Award, and the average amount of Points deducted is 100, the average amount of points depicted on this graph is 100 rather than -100.

Figure 21-22: Loyalty Rules Results Trend Report - Average Points Chart

Detail Information:

- Program - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

For each Program Level:

- Program Level ID - Name - The unique numeric identifier for the Program Level, and the Name describing the Level.

- Loyalty Rule ID - The unique numeric identifier for the Loyalty Rule.

- Description - The name describing the Rule.

- Activity Type - The activity associated with the rule result. Possible Activity Types are:

  - Account Merge

  - Activate Card

  - Award

  - Balance Transfer

  - Change Earn Date

  - Change Level

  - Deactivate Card

  - Earn Points

  - Expire Points

  - Inquiry

  - Issue

  - Point Recovery

  - Reset Expiration Date

- Return

- Sustain Extension

- Void Transaction

• Activity Date - The date when the activitie(s) took place.

• Number of Accounts - The number of Accounts involved in the rule results for the date, activity, and rule.

• Number of Points - The net total number of points involved in the rule results for the date, activity, and rule. Expressed as an absolute value.

• Average Points - The Number of Points / the Number of Accounts.

• Totals for Rule:

- Number of Accounts - The number of Accounts involved in rule results for the rule.

- Number of Points - The number of points involved in rule results for the rule.

- Average Points - The Number of Points / the Number of Accounts.

• Totals for Program Level:

- Number of Accounts - The number of Accounts involved in rule results for the Program Level.

- Number of Points - The number of points involved in rule results for the Program Level.

- Average Points - The Number of Points / the Number of Accounts.

• Totals for Program:

- Number of Accounts - The number of Accounts involved in rule results for the Program.

- Number of Points - The number of points involved in rule results for the Program.

- Average Points - The Number of Points / the Number of Accounts.

• Report Totals:

- Number of Accounts - The total number of Accounts involved in rule results on the report.

- Number of Points - The total number of points involved in rule results on the report.

- Average Points - The Number of Points / the Number of Accounts.

An account can be included in the Number of Accounts totals more than once if, for example, multiple rules were applied for the account during the date range on the report.

Loyalty Account Balance Summary Report

This report presents summary information about the Loyalty Account balances, by Program Level, within each Program.

Selection Criteria

• Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to

work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include Loyalty Cards generated during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

- Program Level ID - The unique numeric identifier for the Loyalty Program Level.

- Program Level Name - The Name describing the Loyalty Program Level.

- Balance Range - The range of balance totals categorizing the Loyalty Accounts for all generated Cards, including Cards not yet activated and Cards that have been activated and then deactivated. Possible ranges are:

  - Balance Less Than 0 - Includes Accounts with negative balances.

  - Balance Equals 0 - Includes Accounts whose balances are exactly 0.00.

- Balance Greater Than .01 - Includes Accounts whose balances are greater than 0.00, including Accounts with balances of .01.

• Rolled-Up Earned Points Balance - The total points balance for all Accounts included in the Balance Range.

• Number Of Accounts - The total number of Loyalty Accounts for all generated Cards in the Balance Range, including Cards not yet activated and Cards that have been activated and then deactivated.

• Totals for Program Level:

- Rolled-Up Earned Points Balance - The total points balance for all Accounts for the Level.

- Number of Accounts - The total number of Loyalty Accounts for all generated Cards for the Program Level, including Cards not yet activated and Cards that have been activated and then deactivated.

• Totals for Program:

- Rolled-Up Earned Points Balance - The total points balance for all Accounts for the Program.

- Number of Accounts - The total number of Loyalty Accounts for all generated Cards for the Program, including Cards not yet activated and Cards that have been deactivated.

• Report Totals:

- Rolled-Up Earned Points Balance - The total points balance for all Accounts included in the totals on the report.

- Number of Accounts - The total number of Loyalty Accounts for all generated Cards included in the totals on the report.

Loyalty Account Last Use Summary Report

This report presents Loyalty Account summary information within Loyalty Program Level, grouped by the number of months since last use date.

Selection Criteria

• Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

• Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

• Activity Time Period - Optionally, select a time period to include Loyalty Cards generated during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

- Program Level ID - The unique numeric identifier for the Loyalty Program Level.

- Program Level Name - The Name describing the Loyalty Program Level.

- Last Use Interval - The range of dates when there was most recently any activity for the Accounts. Possible intervals are:

  - Less Than 30 Days - Includes Cards that have not yet been activated.

  - 31 to 60 Days

  - 61 to 90 Days

  - Over 90 Days - Includes Cards that have been deactivated.

  - Never Used

- Number Of Accounts - The total number of Loyalty Accounts for all generated Cards for this Level in the Last Use Interval, including Cards not yet activated and Cards that have been deactivated.

- Earned Points Balance - The total points balance for all Accounts included in the Last Use Interval.

- Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

- Totals for Program Level:

  - Number Of Accounts - The total number of Loyalty Accounts for all generated Cards in the Program Level, including Cards not yet activated and Cards that have been deactivated.

  - Earned Points Balance - The total points balance for all Accounts for the Program Level.

- Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

- Totals for Program:

  - Number Of Accounts - The total number of Loyalty Accounts for all generated Cards in the Program, including Cards not yet activated and Cards that have been deactivated.

  - Earned Points Balance - The total points balance for all Accounts for the Program.

  - Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

- Report Totals:

  - Number Of Accounts - The total number of Loyalty Accounts for all generated Cards included in the report totals.

  - Earned Points Balance - The total points balance for all Accounts included in the report totals.

  - Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

Loyalty Account Life Cycle Summary Report

This report presents summary information within a Loyalty Program Level, grouped by the number of months that the Accounts have been in use.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include Loyalty Cards with activity or transactions during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Activation Intervals for all Programs and Program Levels for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

- Program Level ID - Name - The unique numeric identifier for the Loyalty Program Level, and the Name describing the Loyalty Program Level.

- Activation Interval - The time frame when the accounts were created. Possible time frames are:

  - Less Than 30 Days

  - 31 to 60 Days

  - 61 to 90 Days

  - Over 90 Days

- Number of Accounts - The total number of accounts for the Level and Activation Interval that have been activated. Includes accounts that have been activated and then deactivated.

- Earned Points Balance - The total balance of points for the accounts.

- Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

- Totals for Program Level:

  - Number of Accounts - The total number of accounts for the Program Level that have been activated. Includes accounts that have been activated and then deactivated.

  - Earned Points Balance - The total number of points for the accounts.

  - Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

- Totals for Program:

  - Number of Accounts - The total number of accounts for the Program that have been activated. Includes accounts that have been activated and then deactivated.

- Earned Points Balance - The total number of points for the accounts.

- Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

- Report Totals:

  - Number of Accounts - The total number of accounts included on the report that have been activated. Includes accounts that have been activated and then deactivated.

  - Earned Points Balance - The total number of points for the accounts.

  - Average Earned Points Balance - The Earned Points Balance / the Number of Accounts.

Loyalty Account Activity Summary Award Report

This report presents the earned points from Award rules, or paid points for Awards, by Loyalty Account, within a given period of time.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include Loyalty Cards with award transaction dates during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Account IDs for all Programs and Program Levels for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Program ID - The numeric ID for the Loyalty Program(s) selected when generating the report. Set to ALL if there was no restriction.

- Program Level - The numeric ID for the Loyalty Level(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Program - The unique numeric identifier for the Loyalty Program, and the Name describing the Loyalty Program.

- Program Level ID - Name - The unique numeric identifier for the Loyalty Program Level, and the Name describing the Loyalty Program Level.

- Account ID - The unique numeric identifier for the account.

- Earned Points - The current total earned points balance for the account during the activity period, net of points used for awards.

- Totals for Program Level - The total Earned Points for the Program Level during the activity period.

- Totals for Program - The total Earned Points included on the report for the Program during the activity period.

- Report Totals - The total Earned Points included on the report for the activity period.

Loyalty Account Activity Summary Issue Report

This report presents the earned points from Issue rules, by Loyalty Account, within a given period of time.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

  After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include Loyalty Cards with issue transaction dates during this period on the report rather than entering an

Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

• Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

• Activity End Date - The last date to include on the report. Defaults to the current date (today).

• Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Account IDs for all Programs and Program Levels for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

• Organization - The code identifying your organization.

• Date Range - The date range selected when generating the report.

• Program ID - The numeric ID for the Loyalty Program(s) selected when generating the report. Set to ALL if there was no restriction.

• Program Level - The numeric ID for the Loyalty Level(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

• Program ID - Name - The unique identifier for the Loyalty Program, and the Name describing the Loyalty Program.

• Program Level ID - Name - The unique identifier for the Loyalty Program Level, and the Name describing the Loyalty Program Level.

• Account ID - The unique numeric identifier for an account associated with any issue activity.

• Activity Type - Set to Issue.

• Earned Points - The total points issued for the account for the date range. Not net of points used for level changes or awards.

- Totals for Program Level - The total Earned Points for the Program Level for the date range. Not net of points used for level changes or awards.

- Totals for Program - The total Earned Points included on the report for the Program for the date range. Not net of points used for level changes or awards.

- Report Totals - The total Earned Points included on the report. Not net of points used for level changes or awards.

Loyalty Program Level Summary Report

This report presents the current balance statistics for Program Levels within Programs.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Loyalty Program for a Card Definition. All Loyalty Programs are selected by default. Optionally, select Search to work with the list of eligible Loyalty Programs, search based on Loyalty Program Name, or remove Loyalty Programs from the list selected for the report.

    After you make a Program ID / Name selection, clear the Program Level ID that is automatically selected as a result and reset Program Level IDs as needed.

- Program Level ID / Name - The ID and Name identifying a Level for a Loyalty Program. Optionally, select Search to work with the list of eligible Levels, search based on Level ID and Name, or remove Levels from the list selected for the report.

- Activity Time Period - Optionally, select a time period to include Loyalty Cards that were generated during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

    - Last Month

    - Last Year

    - Last 30 Days

    - Last 60 Days

    - Last 90 Days

    - This Week

    - This Month

    - This Year

    If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Program Levels for all Programs for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program - The unique identifier for the Loyalty Program, and the Name describing the Loyalty Program.

- Program Level ID - The unique numeric identifier for the Loyalty Program Level.

- Program Level Name - The Name describing the Loyalty Program Level.

- Number of Accounts - The total number of cards generated during the date range that are currently at this Program Level.

- Total Earned Point Balance - The total current net earned points for all accounts generated during the date range that are currently at this Program Level.

- Total Bonus Point Balance - The total current net bonus points applied for all accounts generated during the date range that are currently at this Program Level.

- Total Escrow Point Balance - The total current net escrow points for all accounts generated during the date range that are currently at this Program Level.

- Average Earned Balance - The Total Earned Point Balance / the Number of Accounts.

- Average Bonus Balance - The Total Bonus Point Balance / the Number of Accounts.

- Average Escrow Balance - The Total Escrow Point Balance / the Number of Accounts.

- Totals for Program:

  - Number of Accounts - The total number of cards generated during the date range for the Program.

  - Total Earned Point Balance - The total current net earned points for all accounts generated during the date range for the Program.

  - Total Bonus Point Balance - The total current net bonus points applied for all accounts generated during the date range for the Program.

  - Total Escrow Point Balance - The total current net escrow points for all accounts generated during the date range for the Program.

  - Average Earned Balance - The Total Earned Point Balance / the Number of Accounts.

  - Average Bonus Balance - The Total Bonus Point Balance / the Number of Accounts.

  - Average Escrow Balance - The Total Escrow Point Balance / the Number of Accounts.

- Report Totals:

  - Number of Accounts - The total number of cards included on the report.

  - Total Earned Point Balance - The total current net earned points for all accounts included on the report.

  - Total Bonus Point Balance - The total current net bonus points applied for all accounts included on the report.

- Total Escrow Point Balance - The total current net escrow points for all accounts included on the report.

- Average Earned Balance - The Total Earned Point Balance / the Number of Accounts.

- Average Bonus Balance - The Total Bonus Point Balance / the Number of Accounts.

- Average Escrow Balance - The Total Escrow Point Balance / the Number of Accounts.

Registry Management Reports

Registry Detail Report

This report presents detailed information for Gift Registries or Wish Lists.

Selection Criteria

- Customer ID / Name - The ID and Name identifying a Customer. All Customers are selected by default. Optionally, select Search to work with the list of eligible Customers, search based on Customer Name, or remove Customers from the list selected for the report. Only Customers selected with a Gift Registry or Wish List are available for selection.

  After you make a Customer ID / Name selection, clear the Registry ID that is automatically selected as a result and reset Program Level IDs as needed.

- Registry Type - The type of Registry: Gift Registry or Wish List. Both types are selected by default. Optionally, remove a type or Registry to exclude it from the report.

  After you make a Registry Type selection, clear the Registry ID / Name that is automatically selected as a result and reset Registry IDs as needed.

- Registry ID / Name - The ID and Name identifying a Gift Registry or Wish List. All Registries and Wish Lists are selected by default. Optionally, select Search to work with the list of Registries and Wish Lists, search based on Registry or Wish List Name, or remove Registries or Wish Lists from the list selected for the report.

- Registry Event Date Range - Optionally, select a time period to include Gift Registries scheduled during this period or Wish Lists created during this period on the report rather than entering an Registry Event Start Date or Registry Event End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

Gift Registries scheduled for future dates are not included in any of these time periods. To include Gift Registries for future dates, use the Registry Event Start Date and Registry Event End Date options to select a date range that includes the scheduled date for the future Gift Registry.

If you select a Registry Event Time Period, the Registry Event Start Date and Registry Event End Date criteria are ignored.

- Registry Event Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Registry Event End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of items for all Registries for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Customer ID - The numeric ID for the Customer(s) selected when generating the report. Set to ALL if there was no restriction.

- Registry ID - The numeric ID for the Registry(s) or Wish List(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Primary Customer ID - The unique numeric identifier for a Customer.

- Registry ID - Name - The unique numeric identifier for a Registry or Wish List, and the Name describing the Registry or Wish List.

- Event Date - The date for an Item Registry. Set to N/A for a Wish List. Repeated for each Item for the Registry.

- Venue Name and Venue Address - The Venue Name and Address for an Item Registry. Set to N/A for a Wish List. Repeated for each Item for the Registry.

- First Name and Last Name - The primary Customer's first and last name. Repeated for each Item for the Registry or Wish List.

- Email Address and Phone Number - The primary Customer's email address and phone number, as specified for the Registry or Wish List. Not from the current primary email address and phone from the Customer record. Set to N/A if not specified.

- Address - The primary Customer's address, as specified for the Registry or Wish List. Not from the current primary address from the Customer record. Set to N/A if not specified.

- Item ID - Name - The ID and Name of the Item on the Registry or Wish List.

- Desired Quantity - The desired quantity of the Item. Includes a two-position decimal.

- Purchased Quantity - The purchased quantity of the Item. Includes a two-position decimal.

- Totals for Registry:
  - Desired Quantity - The total desired quantity of all Items on the Registry or Wish List that are included on the report. Includes a two-position decimal.
  - Purchased Quantity - The total purchased quantity of all Items on the Registry or Wish List that are included on the report. Includes a two-position decimal.
- Report Totals:
  - Desired Quantity - The total desired quantity of all Items included on the report. Includes a two-position decimal.
  - Purchased Quantity - The total purchased quantity of all Items included on the report. Includes a two-position decimal.

Segment Management Reports

N-Tile / Range Strata Report
This report presents details on Customer Segments broken out by strata.

Selection Criteria
- Segment ID / Name - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Public Stratified Segments with a Customer Count > 0 are eligible for selection.
- Save List Flag - Optionally, select Yes or No to have the report include Segments based on whether the Save as List flag was selected at Segment creation. Set to All by default.
- Trended Flag - Optionally, select Yes or No to have the report include Segments based on whether the Trend Results? flag was selected at Segment creation.
- Activity Time Period - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.
- Start Segment Run Date - The first date to include on the report. Defaults to the previous date (yesterday).

- End Segment Run Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of levels for all runs of all Segment Strata for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Segment ID - The numeric ID for the Segment(s) selected when generating the report. Set to ALL if there was no restriction.

- Save List Flag - Indicates if a Save List Flag setting of Yes or No was selected when generating the report. Set to ALL if there was no restriction.

- Trended Flag - Indicates if a Trended Flag setting of Yes or No was selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Segment - The unique numeric identifier for the Segment and the Name describing the Segment.

- Run ID - The unique numeric identifier for a run of the Segment. Each Run is numbered sequentially, starting with a Run ID of 0.

- Strata Type - Either Range Strata or N-Tile.

- Segment Count - The number of Customer records included in the Segment.

- Strata Level ID - Name - The unique numeric identifier of the stratum and the Name describing the stratum.

- Save List Flag and Trended Flag - Indicates the settings of the Save as List flag and the Trend Results? flag specified at Segment creation.

- Min Value and Max Value - Depending on whether this is an N-Tile or Range Strata Segment:

  - N-Tile - The minimum and maximum values determined by the system when splitting the Segment into strata.

  - Range Strata - The Range From and Range To values specified when the Segment was created.

  For example, if the Segment is stratified based on Annual Income, these are the minimum and maximum Annual Income totals qualifying Customers for assignment to this stratum.

- Percent Total - The percentage of the Segment Count that consists of the Customers in this stratum: Stratified Customer Count / Segment Count, presented as a percentage.

- Run Date - The date when the Run took place.

- Stratified Customer Count - The total number of Customer records in the stratum.

- Totals for Run - The total Segment Count for the Run included on the report.

- Totals for Segment - The total Segment Count included on the report.

- Report Totals - The total Segment Count for all Segments included on the report.

Segment by Home Location Report

This report presents a count of Customers, by their Home Locations, for Customer Segments.

Customers who are not assigned to a Home Location are not included in the totals on the report.

Selection Criteria

- Segment ID / Name - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Segments that have at least one Customer with an address are eligible for selection.

- Time Period - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. For manual Segments, the time period applies to when the Customers were added to the Segments. Set to None by default. Available time periods are:

  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- Start Segment Run Date - The first date to include on the report. Defaults to the previous date (yesterday).

- End Segment Run Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of home location/ segment combinations for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- End Segment Run Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of states or provinces for all Segments for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Segment Name - The numeric ID for the Segment(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Segment ID - Name - The unique numeric identifier of the Segment and the Name describing the Segment.

- State - The name of the state or province where Customers in the Segment have addresses.

- Customer Count - The number of Customer addresses in this state for the Segment. Includes both primary and non-primary addresses.

- Totals for Segment - The total number of Customer addresses for the Segment.

- Report Totals - The total Customer Count for all Segments included on the report.

Segment Count List Report

This report presents the details of each Segment run within a specified time period.

Stratified and unstratified Segments that have not been run during the selected time period are not included on the report.

Selection Criteria

- Segment ID / Name - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Segments that have at least one Customer with an address are eligible for selection.

- Time Period - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:

    - Yesterday

    - Last Week

    - Last Month

    - Last Year

    - Last 30 Days

    - Last 60 Days

    - Last 90 Days

- This Week

- This Month

- This Year

  If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- Start Segment Run Date - The first date to include on the report. Defaults to the previous date (yesterday).

- End Segment Run Date - The last date to include on the report. Defaults to the current date (today).

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Segment ID - The numeric ID for the Segment(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Segment ID - Name - The unique numeric identifier for the Segment and the Name describing the Segment.

- Save List Option - Indicates the settings of the Save as List flag specified at Segment creation.

- Trended Flag - Indicates the settings of the Trend Results? flag specified at Segment creation.

- Last Run Date - The last date when the Segment was run. Set to N/A for manual Segments.

- Run Count - The number of times when a segment was run. This count does not apply for a manual Segment, although a Run Count might be listed.

- Customer Count - The total number of Customers in the Segment.

- Report Totals:

  - Run Count - The total Run Count for all Segments listed on the report.

  - Customer Count - The total number of Customers in all Segments listed on the report.

Segment Customer Master Report

This report presents a listing of information about the Customers in each Segment. Only Customers that have primary email, phone, and mailing addresses are included on the report.

Selection Criteria

- Segment ID / Name - The ID and Name identifying a Customer Segment. All Segments that include at least one Customer are selected by default. Optionally, select Search to work with the list of Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Segments that have at least one Customer are eligible for selection.

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Customers for all Segments for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Segment ID - The numeric ID for the Segment(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Segment ID - The unique numeric identifier for the Segment and the Name describing the Segment.

- Run Id - This field is not currently implemented.

- Cust ID - Name - The unique numeric identifier for the Customer, and the Customer's first and last name.

- Gender - The Customer's gender, if known; otherwise, set to N/A.

- Active Flag - Set to Yes unless the Customer has been flagged as inactive.

- Street, City, State - The street address, city, and state or province for the Customer's primary mailing address.

- Postal Code - The postal or Zip code for the Customer's primary mailing address.

- Phone Number - The Customer's primary phone number.

- Email - The Customer's primary email address.

- Home Location - The unique numeric code for the Customer's Home Location, if any.

- Birth Date - The Customer's birth date, if known.

- SignUp Date - The date when the Customer record was created.

- First Trans Date - The date of the Customer's first recorded transaction, if any; otherwise, set to N/A.

- Last Trans Date - The date of the Customer's most recently recorded transaction, if any; otherwise, set to N/A.

- Total Return Item Count Dollars - The total extended merchandise value of returned items from the Customer's transaction history. Rounded to the nearest whole number.

- Total Sale Item Count Dollars - The total extended merchandise value of sold items from the Customer's transaction history. Rounded to the nearest whole number.

- Total Trans Count - The total number of individual transactions from the Customer's transaction history. Each transaction can include multiple items.

- Total Profit Percent - The total Sale Item Count Dollars - the total extended Unit Cost of the items on the transactions / the total Sale Item Count Dollars. Presented as a percentage with a two-position decimal.

- YTD Return Item Count Dollars - The total extended merchandise value of returned items for the Customer's transactions during the current year. Rounded to the nearest whole number.

- YTD Sale Item Count Dollars - The total extended merchandise value of sold items from the Customer's transactions during the current year. Rounded to the nearest whole number.

- YTD Profit Percent - The total YTD Sale Item Count Dollars - the total extended unit cost of the items on the transactions / the total YTD Sale Item count Dollars. Presented as a percentage with a two-position decimal.

Segment Purchase Profile Report

This report presents counts, by Segment, of individual items purchased.

Segments that have not had purchases during the selected time period are not included on the report.

Selection Criteria

- Segment ID / Name - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report.

- Purchase Activity Time Period - This criterion is not implemented for this report. All purchases for the selected Segment are eligible for inclusion, regardless of activity date.

- Purchase Activity Start Date - This criterion is not implemented for this report.

- Purchase Activity End Date - This criterion is not implemented for this report.

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of items for all Segments for the entire report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Segment ID - The numeric ID for the Segment(s) selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Segment ID - Name - The unique numeric identifier of the Segment and the Name describing the Segment.

- Item Class - The code identifying the Class for the item.

- Item Sub Class - The code identifying the Sub Class for the item.

- Item ID - The unique identifier for the item.

- Item Description - The description of the item.

- Customer Count - The number of Customers within the Segment that purchased the item.

- Transaction Count - The total number of transactions in which Customers in the Segment purchased the item.

- Item Quantity - The total quantity of the item purchased by Customers in the Segment.

- Item Extended Amount - The total extended amount paid for all units of the item sold to Customers in the Segment.

- Units per Transaction - The average number of units of the item purchased in a transaction by a Customer in the Segment.

- Totals for Item Class:

  - Customer Count - The total number of Customers within the Segment that purchased any items in the Item Class.

  - Transaction Count - The total number of transactions in which Customers in the Segment purchased items in the Item Class.

  - Item Quantity - The total quantity of items in the Item Class purchased by Customers in the Segment.

  - Item Extended Amount - The total extended amount paid for all items in the Item Class sold to Customers in the Segment.

  - Units per Transaction - The average number of units in the Item Class purchased in a transaction by a Customer in the Segment. Rounded to the nearest whole number.

- Totals for Segment:

  - Customer Count - The total number of Customers within the Segment that purchased any items.

  - Transaction Count - The total number of transactions in which Customers in the Segment purchased items.

  - Item Quantity - The total quantity of items purchased by Customers in the Segment.

  - Item Extended Amount - The total extended amount paid for all items sold to Customers in the Segment.

  - Units per Transaction - The average number of units in purchased in a transaction by a Customer in the Segment. Rounded to the nearest whole number.

- Report Totals:

  - Customer Count - The total number of Customers included on the report.

  - Transaction Count - The total number of transactions included on the report.

  - Item Quantity - The total quantity of purchased items included on the report.

  - Item Extended Amount - The total extended amount paid for all items included on the report.

  - Units per Transaction - The average number of units purchased in a transaction. Rounded to the nearest whole number.

Segment Trend Analysis Report

This report presents trend totals for Customer Segments broken out by Run ID.

The report includes two charts illustrating trend totals for Customer Segments. One chart displays total Customer counts for each Run ID for a Segment, while the other displays total Customer counts for the strata within a Segment.

> **Note:** The charts on this report are useful only if you restrict the selection criteria to a single Customer Segment, so you can identify the totals for the Segment Run IDs and strata. Otherwise, it would be difficult to determine the different totals for multiple Customer Segments.

Selection Criteria

- Segment ID / Name - The ID and Name identifying a Customer Segment. All eligible Segments are selected by default. Optionally, select Search to work with the list of eligible Segments, search based on Segment Name, or remove Segments from the list selected for the report. Only Stratified Segments that have Trend Results? selected and have a Customer Count > 0 are eligible for selection.

- Save List Flag - Optionally, select Yes or No to have the report include Segments based on whether the Save as List flag was selected at Segment creation. Set to All by default.

- Activity Time Period - Optionally, select a time period to include Segments run during this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:
  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week
  - This Month
  - This Year

  If you select an Activity Time Period, the Start Segment Run Date and End Segment Run Date criteria are ignored.

- Start Segment Run Date - The first date to include on the report. Defaults to the previous date (yesterday).

- End Segment Run Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Run IDs for the entire report.

Select Apply to apply the selected criteria and generate the report.

The report does not include any content for Customer Segments that do not have the Save as List flag selected.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Segment ID - The numeric ID for the Segment(s) selected when generating the report. Set to ALL if there was no restriction.

- Save List Flag - Indicates if a Save List Flag setting of Yes or No was selected when generating the report. Set to ALL if there was no restriction.

Customer Count - Segment Count Trend Chart - Displays the total number of Customers included in the Segment for each Run ID. The date and Run ID are indicated below.
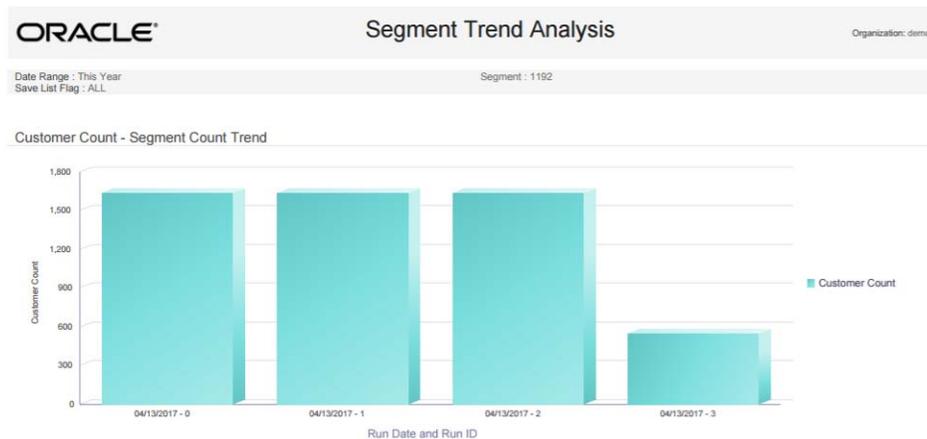
Figure 21-23: Segment Trend Analysis Report - Customer Count - Segment Count Trend Chart

An additional chart follows the Detail Information for the Segment Count Trend chart.

Detail Information for Segment Count Trend chart:

- Segment ID - Name - The unique numeric identifier for and the Name describing the Segment.

For each Run ID:

- Save List Flag - The setting of the Save List flag for the Segment. Always set to Yes for all Run IDs. The report does not include any data for a Segment that does not have the Save List flag selected.

- Run ID - A sequence number identifying the Run for the Segment. Each Run is numbered sequentially, starting with a Run ID of 0.

- Run Date - The date when the Run was generated.

- Customer Count - The number of Customers in the Segment after processing the Run.

- Totals for Segment - The total number of Customers for all Runs.

- Report Totals - The total number of Customers for all Runs of all Segments included on the report.

An additional chart follows this detail information.

Customer Count - Segment Strata Trend Analysis Chart - Displays the total number of Customers included in each stratum for the Segment for each Run ID. The date and Run ID are indicated below.
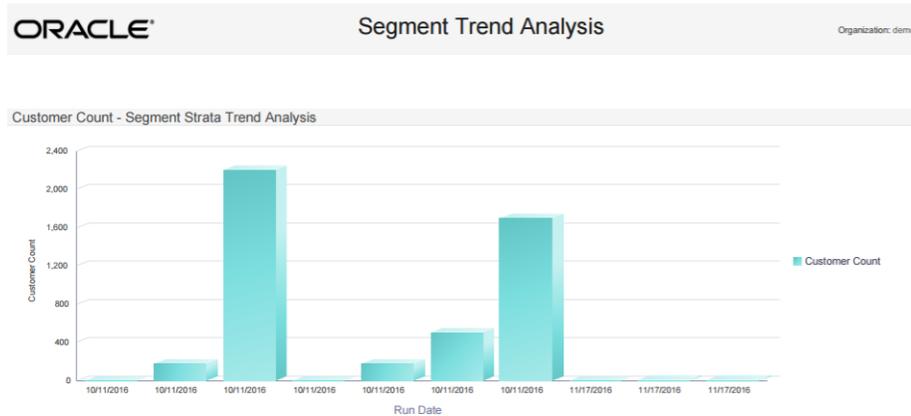
Figure 21-24: Segment Trend Analysis Report - Customer Count - Segment Strata Trend Analysis Chart

Detail Information for the Segment Strata Trend Analysis chart: For each Run ID:

- Segment ID - Name - The unique numeric identifier for and the Name describing the Segment.

- Save List Flag - The setting of the Save List flag for the Segment. Always set to Yes. The report does not include any data for a Segment that does not have the Save List flag selected.

- Run ID - A sequence number identifying the Run for the Segment. Each Run is numbered sequentially, starting with a Run ID of 0.

For each stratum in the Segment from the Run ID:

- Run Date - The date when the Run was generated. The same date is listed for all strata in the Run.

- Strata Min Value - The minimum value for a Customer to be included in the stratum. Based on the Field to Stratify On selected for the Segment.

- Strata Max Value - The maximum value for a Customer to be included in the stratum. Based on the Field to Stratify On selected for the Segment.

- Strata Average Value - The average value for all Customers in the stratum: the total Value / the Stratified Customer Count.

- Stratified Customer Count - The total number of Customers in the stratum.

  The report may include an extra stratum with a Strata Min Value, Strata Max Value, Strata Average Value, and Stratified Customer Count of 0.

- Totals for Run - The total number of Customers for all Strata in the Run.

- Totals for Segment - The total number of Customers for all Runs for the Segment included on the report.

- Report Totals - The total number of Customers for all Runs for all Segments included on the report.

Task Management Reports

Associate Task Details Report

This report presents details on customer targeted tasks, by the associate assigned to them.

Selection Criteria

- Location ID / Name - The ID and Name identifying a retail Location where Tasks might be assigned. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

  If you select a Location ID, additional criteria may be selected automatically. If needed, set any remaining criteria to All to avoid restricting the report results to those that match the automatically selected criteria.

- Task Type - Codes identifying types of Tasks. All Task Types are selected by default. Optionally, select Search to work with the list of eligible Task Types, search based on Task Type, or remove Task Types from the list selected for the report. Task Types include:

  - ADMIN

  - APPOINTMENT

  - EVENT

  - TASK

  - TODO

- Associate ID / Name - The user ID and name of the Associate assigned to the Task. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.

- Task Time Period - Optionally, select a time period to include Tasks scheduled for dates in this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week (excludes future dates)

  - This Month (excludes future dates)

  - This Year (excludes future dates)

  If you select a Task Time Period, the Task Start Date and Task End Date criteria are ignored.

- Task Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Task End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of Tasks to include on the report.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Location ID - The Location ID(s), if any, selected when generating the report. Set to ALL if there was no restriction.

- Task Type - The Task Type(s), if any, selected when generating the report. Set to ALL if there was no restriction.

- Associate ID - The Associate ID(s), if any, selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Task ID - A unique numeric identifier for the Task.

- Task Status - The current status of the Task. Possible statuses are:

    - Open

    - In Progress

    - Cancelled

    - Closed

- Task Priority - The priority of the Task. Possible priorities are:

    - Low

    - Medium

    - High

- Task Loc ID - The unique numeric identifier for the Location, if any, associated with the Task. Otherwise, set to N/A.

- Task Subject - The Subject entered to describe the Task.

- Task Start Date - The Start Date specified for the Task.

- Task End Date - The End Date specified for the Task.

- Customer ID - The unique numeric identifier for the Customer. Set to N/A if there is no Customer associated with the Task.

- Create Date - The date when the Task was created.

- Update Date - The date when the Task was most recently updated. Set to N/A if the Task has not been updated.

- Create User - The user ID of the User who created the Task.

- Update User - The user ID of the User who most recently updated the Task. Set to N/A if the Task has not been updated.

Associate Task Summary Report

This report presents a summary of the types of Tasks assigned to each Associate, and their current statuses.

Selection Criteria

- Location ID / Name - The ID and Name identifying a retail Location that might be associated with assigned Tasks. All Locations are selected by default. Optionally, select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Task Type - Codes identifying types of Tasks. All Task Types are selected by default. Optionally, select Search to work with the list of eligible Task Types, search based on Task Type, or remove Task Types from the list selected for the report. Task Types include:

  - ADMIN

  - APPOINTMENT

  - EVENT

  - TASK

  - TODO

- Associate ID / Name - The user ID and name of the Associate assigned to the Task. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.

- Task Time Period - Optionally, select a time period to include Tasks scheduled for dates in this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week (excludes future dates)

  - This Month (excludes future dates)

  - This Year (excludes future dates)

  If you select a Task Time Period, the Task Start Date and Task End Date criteria are ignored.

- Task Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Task End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. Each row represents a unique combination of Task Type, Associate ID, and Task Status.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Location ID - The Location ID(s), if any, selected when generating the report. Set to ALL if there was no restriction.

- Task Type - The Task Type(s), if any, selected when generating the report. Set to ALL if there was no restriction.

- Associate ID - The Associate ID(s), if any, selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Task Type - The type of Task. Possible Types are:
    - Admin
    - Appointment
    - Event
    - Task
    - Todo

- Associate ID - The identifier of the Associate assigned to the Task. Set to N/A if no Associate is assigned.

- Associate Name - The name of the Associate assigned to the Task. Set to N/A if no Associate is assigned.

- Task Status - The current status of the Task. Possible statuses are:
    - Open
    - In Progress
    - Cancelled
    - Closed

- Task Count - The total number of Tasks of this Type, assigned to this Associate (or unassigned), and in the same status, included on the report.

- Totals for Task Type - The total number of Tasks of this Type included on the report.

- Report Totals - The total number of Tasks included on the report.

Task Status Summary Report

This report presents a summary of types of Tasks by their current statuses.

Selection Criteria

- Location ID / Name - The ID and Name identifying a retail Location that might be associated with assigned Tasks. All Locations are selected by default. Optionally,

select Search to work with the list of eligible Locations, search based on Location Name, or remove Locations from the list selected for the report.

- Task Type - Codes identifying types of Tasks. All Task Types are selected by default. Optionally, select Search to work with the list of eligible Task Types, search based on Task Type, or remove Task Types from the list selected for the report. Task Types include:

  - ADMIN
  - APPOINTMENT
  - EVENT
  - TASK
  - TODO

- Associate ID / Name - The user ID and name of the Associate assigned to the Task. All Associates are selected by default. Optionally, select Search to work with the list of eligible Associates, search based on Associate Name, or remove Associates from the list selected for the report.

- Task Time Period - Optionally, select a time period to include Tasks scheduled for dates in this period on the report rather than entering a Start Segment Run Date or End Segment Run Date. Set to None by default. Available time periods are:

  - Yesterday
  - Last Week
  - Last Month
  - Last Year
  - Last 30 Days
  - Last 60 Days
  - Last 90 Days
  - This Week (excludes future dates)
  - This Month (excludes future dates)
  - This Year (excludes future dates)

  If you select a Task Time Period, the Task Start Date and Task End Date criteria are ignored.

- Task Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Task End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. Each row represents a unique combination of Task Type and Task Status.

Select Apply to apply the selected criteria and generate the report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Location ID - The Location ID(s), if any, selected when generating the report. Set to ALL if there was no restriction.

- Associate ID - The Associate ID(s), if any, selected when generating the report. Set to ALL if there was no restriction.

- Task Type - The Task Type(s), if any, selected when generating the report. Set to ALL if there was no restriction.

Detail Information:

- Task Type - The type of Task. Possible Types are:

  - Admin

  - Appointment

  - Event

  - Task

  - Todo

- Task Status - The current status of the Task. Possible statuses are:

  - Open

  - In Progress

  - Cancelled

  - Closed

- Task Count - The total number of Tasks of this Type and status that are included on the report.

- Totals for Task Type - The total number of Tasks of this Type included on the report.

- Report Totals - The total number of Tasks included on the report.

Tender Account Management Reports

Tender (Account) Activity Summary Report

This report displays tender summary information by Activity Type, by Program.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Tender Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Transaction Type - Codes identifying types of activity for a Tender account. All Transaction Type codes are selected by default. Optionally, select Search to work with the list of eligible Transaction Type Codes, search based on Transaction Type Code, or remove Transaction Type Codes from the list selected for the report. Possible Transaction Type Codes include:

  - Activate Card

  - Card Merge

  - Cash Out

  - Change Acct Expiration Date

- Change Pin Authentication

- Deactivate

- Errors

- Inquiry

- Post Authorization

- Pre Authorization

- Redemption

- Release Authorization

- Reload

- Replace

- Reset Expiration Date

- Return

- Reverse Transaction

- Service Charge

- Unblock

- Verify Pin Authentication

- Void Transaction

• Void Flag - Optionally, select Yes or No to select Tender account activity based on whether the activity was voided.

• Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

- Yesterday

- Last Week

- Last Month

- Last Year

- Last 30 Days

- Last 60 Days

- Last 90 Days

- This Week

- This Month

- This Year

If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

• Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

• Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Transaction Types and Void Flag settings for any Program ID for the entire report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program ID - The unique numeric identifier for the Tender Program.

- Program Name - The Name describing the Tender Program.

For each Transaction Type that occurred for the Program:

- Transaction Type - The type of Transaction performed. Possible Transaction Type Codes:

  - Activate Card

  - Card Merge

  - Cash Out

  - Change Acct Expiration Date

  - Change Pin Authentication

  - Deactivate

  - Errors

  - Inquiry

  - Post Authorization

  - Pre Authorization

  - Redemption

  - Release Authorization

  - Reload

  - Replace

  - Reset Expiration Date

  - Return

  - Reverse Transaction

  - Service Charge

  - Unblock

  - Verify Pin Authentication

  - Void Transaction

- Void Flag - Indicates that a transaction has been voided. The record for the original transaction remains, and separate voided and unvoided totals are listed. For example, if a Card Reload is voided, the totals for unvoided Card Reloads are not increased, but the totals for voided Card Reloads are increased.

- Transaction Count - The total number of transactions for the Transaction Type.

- Activity Amount - The total value of transactions for the Transaction Type.

- Average Amount - The Activity Amount / the Transaction Count.

- Program Totals:

  - Transaction Count - The total of the Transaction Counts for the Program.

  - Activity Amount - The total value of Activity Amounts for the Program.

  - Average Amount - The total Activity Amount / the total Transaction Count for the Program.

- Report Totals:

  - Transaction Count - The total value of Transaction Counts on the report.

  - Activity Amount - The total value of Activity Amounts on the report.

  - Average Amount - The total Activity Amount / the total Transaction Count on the report.

Tender Activity Summary by Batch Report

This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Tender Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Transaction Type - Codes identifying types of activity for a Tender account. All Transaction Type codes are selected by default. Optionally, select Search to work with the list of eligible Transaction Type Codes, search based on Transaction Type Code, or remove Transaction Type Codes from the list selected for the report. Possible Transaction Type Codes include:

  - Activate Card

  - Card Merge

  - Cash Out

  - Change Acct Expiration Date

  - Change Pin Authentication

  - Deactivate

  - Errors

  - Inquiry

  - Post Authorization

  - Pre Authorization

  - Redemption

  - Release Authorization

  - Reload

  - Replace

  - Reset Expiration Date

- Return

- Reverse Transaction

- Service Charge

- Unblock

- Verify Pin Authentication

- Void Transaction

- Card Prefix - The prefix number defined for a Card Definition. All Prefixes are selected by default. Optionally, select Search to work with the list of eligible Prefixes, search based on Prefixes, or remove Prefixes from the list selected for the report.

- Card Series Sequence - The Card Series Sequence defined for a Card Series. All Sequence numbers are selected by default. Optionally, select Search to work with the list of eligible Sequence numbers, search based on Sequence numbers, or remove Sequence numbers from the list selected for the report.

- Batch Number - The Card Generation Batch Number defined for a batch. All Batch Numbers are selected by default. Optionally, select Search to work with the list of eligible Batch Numbers, search based on Batch Numbers, or remove Batch Numbers from the list selected for the report.

- Void Flag - Optionally, select Yes or No to select Tender account activity based on whether the activity was voided.

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Transaction Types for any Program ID, Series, and Batch, for the entire report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

Detail Information:

- Program ID - The unique numeric identifier for the Tender Program.

- Program Name - The Name describing the Tender Program.

- Card Prefix - The Prefix number defined for the Card.

- Card Series - The number identifying the Card Series.

- Card Batch - The number identifying the Card Batch.

For each Transaction Type that occurred for the Program, Card Prefix, Series, and Batch:

- Transaction Type - The type of Transaction performed. Possible Transaction Type Codes:
    - Activate Card
    - Card Merge
    - Cash Out
    - Change Acct Expiration Date
    - Change Pin Authentication
    - Deactivate
    - Errors
    - Inquiry
    - Post Authorization
    - Pre Authorization
    - Redemption
    - Release Authorization
    - Reload
    - Replace
    - Reset Expiration Date
    - Return
    - Reverse Transaction
    - Service Charge
    - Unblock
    - Verify Pin Authentication
    - Void Transaction

- Transaction Count - The total number of transactions for the Transaction Type.

- Activity Amount - The total value of transactions for the Transaction Type.

- Average Amount - The Activity Amount / the Transaction Count.

- Program Totals:

  - Transaction Count - The total of the Transaction Counts for the Program.

  - Activity Amount - The total value of Activity Amounts for the Program.

  - Average Amount - The total Activity Amount / the total Transaction Count for the Program.

- Report Totals:

  - Transaction Count - The total value of Transaction Counts on the report.

  - Activity Amount - The total value of Activity Amounts on the report.

  - Average Amount - The total Activity Amount / the total Transaction Count on the report.

Tender Activity Type Trend Report

This report displays tender summary information organized by Card Prefix, Series, and Batch, for Activity Types, by Program.

The totals for all Tender Programs with the same Activity Type, Void Flag setting, and Business Date are combined in the charts at the beginning of the report.

The report begins with three charts illustrating tender type activity. Each chart is described below.

> **Note:** The charts on this report are useful only if you restrict the selection criteria to a single Transaction Type and Void Flag setting, so you can identify the totals for Transaction Type activity. Otherwise, it would be difficult to determine the different totals for the same date but a different Transaction Type or Void Flag setting. You can also restrict the report by Program ID.

Selection Criteria

- Program ID / Name - The ID and Name identifying a Tender Program for a Card Definition. All Programs are selected by default. Optionally, select Search to work with the list of eligible Programs, search based on Program Name, or remove Programs from the list selected for the report.

- Transaction Type - Codes identifying types of activity for a Tender account. All Transaction Type codes are selected by default. Optionally, select Search to work with the list of eligible Transaction Type Codes, search based on Transaction Type Code, or remove Transaction Type Codes from the list selected for the report. Possible Transaction Type Codes include:

  - Activate Card

  - Card Merge

  - Cash Out

  - Change Acct Expiration Date

  - Change Pin Authentication

  - Deactivate

  - Errors

  - Inquiry

- Post Authorization

- Pre Authorization

- Redemption

- Release Authorization

- Reload

- Replace

- Reset Expiration Date

- Return

- Reverse Transaction

- Service Charge

- Unblock

- Verify Pin Authentication

- Void Transaction

- Void Flag - Optionally, select Yes or No to select Tender account activity based on whether the activity was voided.

- Activity Time Period - Optionally, select a time period to include activities that occurred during this period on the report rather than entering an Activity Start Date or Activity End Date. Set to None by default. Available time periods are:

  - Yesterday

  - Last Week

  - Last Month

  - Last Year

  - Last 30 Days

  - Last 60 Days

  - Last 90 Days

  - This Week

  - This Month

  - This Year

  If you select an Activity Time Period, the Activity Start Date and Activity End Date criteria are ignored.

- Activity Start Date - The first date to include on the report. Defaults to the previous date (yesterday).

- Activity End Date - The last date to include on the report. Defaults to the current date (today).

- Row Limit - Optionally, use this field to specify the maximum number of rows to include on the report. This limit applies to the total number of Transaction Types, Void Flag settings, and activity dates for the entire report.

Report Contents

Header Information:

- Organization - The code identifying your organization.

- Date Range - The date range selected when generating the report.

- Transaction Type - The transaction type(s) selected when generating the report, or set to ALL if there was no restriction.

- Program ID - The program ID(s) selected when generating the report, or set to ALL if there was no restriction.

- Void Flag - The void flag setting selected for the report. Set to ALL if there was no restriction.

Transaction Count Chart - Displays the total Transaction Count for each Business Date where the Transaction Type and Void Flag setting are the same.

Figure 21-25: Transaction Count - Tender Activity Type Trend Chart

Activity Amount Chart - Displays the total Activity Amount for each Business Date where the Transaction Type and Void Flag setting are the same
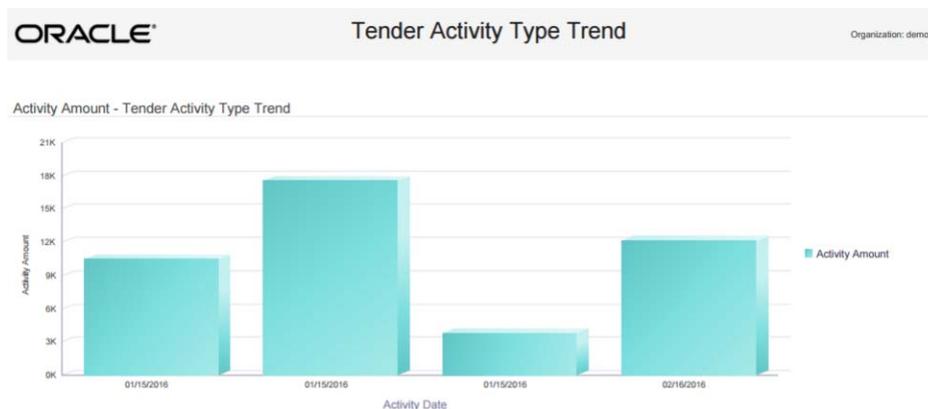
Figure 21-26: Activity Amount - Tender Activity Type Trend Chart

Average Amount Chart - Displays the Average Amount for each Business Date where the Transaction Type and Void Flag setting are the same.
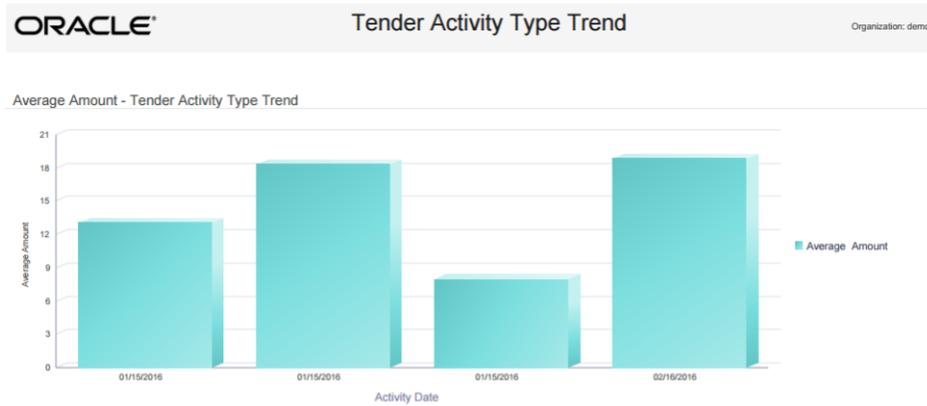
Figure 21-27: Average Amount - Tender Activity Type Trend Chart

Detail Information:

- Program - The unique numeric identifier for the Tender Program, and the Name describing the Tender Program.

- Transaction Type - The type of Transaction performed. Possible Transaction Type Codes:

  - Activate Card

  - Card Merge

  - Cash Out

  - Change Acct Expiration Date

  - Change Pin Authentication

  - Deactivate

  - Errors

  - Inquiry

  - Post Authorization

  - Pre Authorization

  - Redemption

  - Release Authorization

  - Reload

  - Replace

  - Reset Expiration Date

  - Return

  - Reverse Transaction

  - Service Charge

  - Unblock

  - Verify Pin Authentication

- Void Transaction

- Void Flag - Indicates that a transaction has been voided.

- Business Date - The Business Date when the activity occurred.

- Transaction Count - The total number of transactions for the Transaction Type on the Business Date and the same Void Flag setting.

- Activity Amount - The total value of transactions for the Transaction Type on the Business Date and the same Void Flag setting.

- Average Amount - The Activity Amount / the Transaction Count.

- Totals for Transaction Type:

  - Transaction Count - The total of the Transaction Counts for the Transaction Type.

  - Activity Amount - The total value of Activity Amounts for the Transaction Type.

  - Average Amount - The total Activity Amount / the total Transaction Count for the Transaction Type.

- Totals for Program:

  - Transaction Count - The total of the Transaction Counts for the Program.

  - Activity Amount - The total value of Activity Amounts for the Program.

  - Average Amount - The total Activity Amount / the total Transaction Count for the Program.

- Report Totals:

  - Transaction Count - The total value of Transaction Counts on the report.

  - Activity Amount - The total value of Activity Amounts on the report.

  - Average Amount - The total Activity Amount / the total Transaction Count on the report.

22

System Menu Options

Overview

The following is a list of options available from the System menu based on user authority, and indicates where to find more information on each option.

- **Users** - *Customer Engagement Implementation Guide*

- **Role Groups** - *Customer Engagement Implementation Guide*

- **Security Groups** - *Customer Engagement Implementation Guide*

- **Import Users CSV File** - Contact your Oracle representative for information.

- **Associate Role Definition** - *Customer Engagement Implementation Guide*

- **Franchisees** - *Customer Engagement Implementation Guide*

- **Preference Types** - *Customer Engagement Implementation Guide*

- **System Configuration** - *Customer Engagement Implementation Guide*

- **Batch Process Tracking** - Chapter 24: "Batch Process Tracking"

- **Web Service Tracking** - Chapter 23: "Web Service Tracking"

- **Exchange Rate** - Chapter 25: "Exchange Rates"

- **Batch Import Review** - *Customer Engagement Batch Processing and Web Services Guide*

- **File Review, Transfer, and Dashboard** - Chapter 26: "File Review, Transfer, and Dashboard"

- **About Customer Engagement** - Opens a window that indicates the exact release number for Customer Engagement and provides additional information and notices.

23

Web Service Tracking

Overview

You can use Web Service Tracking to review the web service requests received and processed by date, week, and month. Totals for the current day are broken out by hourly totals. The pages display the total number of successful requests processed and the number of requests that failed. For each web service, you can display details broken out by the individual operations, and version numbers. The pages also provide average totals by date, week, and month.

> **Note:** This option is available only if the user has been assigned the *SystemAdmin* role. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information on assigning User Roles.

About this Chapter

This chapter contains the following information:

- [Daily Activity](#) - Describes the Daily Activity page.
- [Detailed Web Service Tracking Window](#) - Describes the Detailed Web Service Tracking [Window](#).
- [Weekly Activity](#) - Describes the Weekly Activity page.
- [Monthly Activity](#) - Describes the Monthly Activity page.

Daily Activity

The Daily Activity page, displaying web service tracking totals for a single day, is opened using the **System->Web Service Tracking** menu option, or by clicking the Daily Activity tab at the [Weekly Activity](#) page or [Monthly Activity](#) page. The current date defaults when you first advance to Web Service Tracking.

Figure 23-1: Daily Activity Page - Web Service Tracking

Table 23-1: *Daily Activity Web Service Tracking Page Key*

Item	Description
1	**Date Selection** - Use the left and right arrow keys to display web service activity for an earlier or later date, or click **Today** to return to the current date. You can also click the displayed date to open a [Calendar Menu](#), where you can select a date.
2	**Actions Menu** - Click the [Actions Menu](#) to refresh the information displayed if you are viewing the current date. The information is updated on an hourly basis.
3	**Daily Activity List** - A [List](#) of web services that had activity on the displayed date, with activity for each hourly period displayed. Only services that had activity on the displayed date are listed. The lists are broken out into AM and PM. All times displayed are in GMT. See below for details.
4	**Daily Totals and Averages** - A [List](#) of the web services that had activity on the displayed date, with daily totals and averages listed.

The Daily Activity [List](#) displays the following information for each web service that had any activity on the displayed date:

- **Service Name** - The name of the web service.

- **Hourly Period Totals** - The total number of successful web service requests processed for the hourly period, with the number of unsuccessful requests followed

by a slash. For example, if there were 120 successful requests in an hourly period, but 25 failed, the numbers displayed are 120/25. An unsuccessful request is one that receives any kind of error. A 0 is displayed if there was no activity for the web service in that hourly period.

For any web service with hourly totals greater than 0, you can click the totals to open the Detailed Web Service Tracking Window, displaying totals for each operation and version for the web service.

The Daily Totals and Averages List displays the following information for each web service that had any activity on the displayed date:

- **Service Name** - The name of the web service.

- **24 Hour Period Total** - The total number of successful and unsuccessful web service requests processed for the displayed date, or for the date so far if the current date is listed.

- **24 Hour Average** - The average number of successful and unsuccessful web service requests processed for the displayed date, or for the date so far if the current date is listed. Averages are rounded down; for example, if the total number of successful requests divided by 24 hours equals 5.95, an average of 5 is displayed as the average.

Actions Menu

The Actions Menu for the Web Service Tracking page contains the following option:

- **Refresh** - Refreshes the List with the most recent totals for web services.

Detailed Web Service Tracking Window

The Detailed Web Service Tracking Window displays the following information about the operations that took place:

Detailed Web Service Tracking: AwardAccountServicesApiService

Operation	Version	Total Successful	Total Failed
expireCoupons	3_1	0	8
getAwardAccountHistory	3_1	12	8
inquiry	3_1	8	5
issueCoupon	3_1	22	17
redeemCoupons	3_1	6	17

Figure 23-2: Detailed Web Service Tracking Window

- **Operation** - The particular method of the request processed.

- **Version** - The version of the message processed.

- **Total Successful** - The total number of successful requests processed for that operation and version in the selected period.

- **Total Failed** - The total number of unsuccessful requests processed for that operation and version in the selected period.

Weekly Activity

The Weekly Activity page that displays web service tracking totals for a particular week is opened by clicking the Weekly Activity tab at the <u>Daily Activity</u> page or the <u>Monthly Activity</u> page. The week associated with the day displayed at the previous page defaults.

Figure 23-3: Weekly Activity Page - Web Service Tracking

Table 23-2: *Weekly Activity Web Service Tracking Page Key*

Item	Description
1	**Date Selection** - Use the left and right arrow keys to display web service activity for an earlier or later week, or click **This Week** to return to the current week. The date of the first day of the week (Monday) is displayed. You can also click the displayed date to open a <u>Calendar Menu</u>, where you can select a date.
2	**Actions Menu** - Click the <u>Actions Menu</u> to refresh the information displayed if you are viewing the current week. The information is updated on an hourly basis.
3	**Weekly Activity List** - A <u>List</u> of web services that had activity on the displayed week, with activity for each date displayed. Only services that had activity on the displayed week are listed. The dates displayed are based on GMT. See below for details.
4	**Weekly Totals and Averages** - A <u>List</u> of the web services that had activity on the displayed week, with weekly totals and averages listed.

The Weekly Activity <u>List</u> displays the following information for each web service that had any activity on the displayed week:

- **Service Name** - The name of the web service.

- **Daily Totals** - The total number of successful web service requests processed for the date, with the number of unsuccessful requests followed by a slash. For example, if there were 120 successful requests on one date, but 25 failed, the numbers displayed

are 120/25. An unsuccessful request is one that receives any kind of error. A 0 is displayed if there was no activity for the web service on that date.

For any web service with daily totals greater than 0, you can click the totals to open the Detailed Web Service Tracking Window, displaying totals for each operation and version for the web service.

The Weekly Totals and Averages List displays the following information for each web service that had any activity on the displayed week:

- **Service Name** - The name of the web service.

- **Week Period Total** - The total number of successful and unsuccessful web service requests processed for the displayed week, or for the week so far if the current week is listed.

- **Weekly Average** - The average number of successful and unsuccessful web service requests processed for the displayed week, or for the week so far if the current week is listed. Averages are rounded down; for example, if the total number of successful requests divided by 7 days equals 5.95, an average of 5 is displayed as the average.

Monthly Activity

The Monthly Activity page, displaying web service tracking totals for a particular year, is opened by clicking the Monthly Activity tab at the Daily Activity page or Weekly Activity page. The year associated with the date displayed at the previous page defaults.
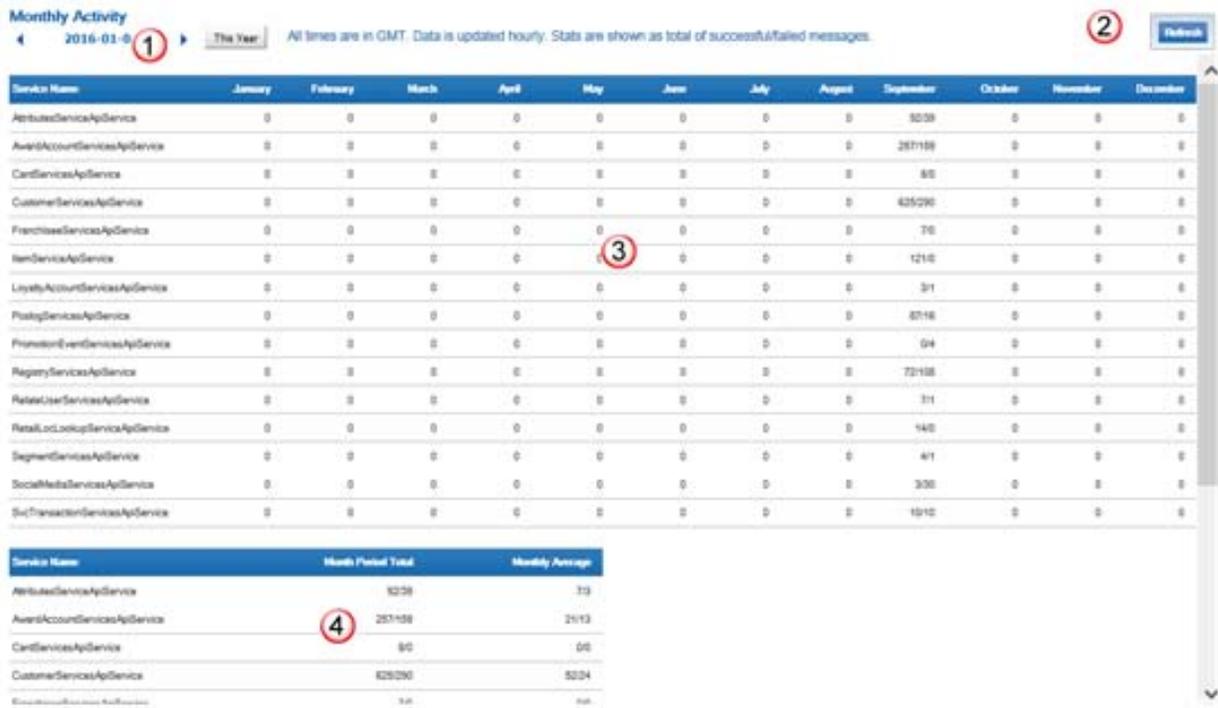
Figure 23-4: Monthly Activity Page - Web Service Tracking

Table 23-3: *Monthly Activity Web Service Tracking Page Key*

Item	Description
1	**Date Selection** - Use the left and right arrow keys to display web service activity for an earlier or later year, or click **This Year** to return to the current year. The date of the first day of the year is displayed. You can also click the displayed date to open a Calendar Menu, where you can select a date.
2	**Actions Menu** - Click the Actions Menu to refresh the information displayed if you are viewing the current year. The information is updated on an hourly basis.
3	**Monthly Activity List** - A List of web services that had activity on the displayed month, with activity for each month displayed. Only services that had activity on the displayed year are listed. See below for details.
4	**Monthly Totals and Averages** - A List of the web services that had activity on the displayed year, with monthly totals and averages listed.

The Monthly Activity List displays the following information for each web service that had any activity on the displayed year:

- **Service Name** - The name of the web service.

- **Monthly Totals** - The total number of successful web service requests processed for the month, with the number of unsuccessful requests followed by a slash. For

example, if there were 120 successful requests in one month, but 25 failed, the numbers displayed are 120/25. An unsuccessful request is one that receives any kind of error. A 0 is displayed if there was no activity for the web service during that month.

For any web service with monthly totals greater than 0, you can click the totals to open the Detailed Web Service Tracking Window, displaying totals for each operation and version for the web service.

The Yearly Totals and Averages List displays the following information for each web service that had any activity on the displayed year:

*   **Service Name** - The name of the web service.

*   **Month Period Total** - The total number of successful and unsuccessful web service requests processed for the displayed year, or for the year so far if the current year is listed.

*   **Monthly Average** - The average number of successful and unsuccessful web service requests processed for the displayed year by month, or for the year so far if the current year is listed. Averages are rounded down; for example, if the total number of successful requests divided by 12 months equals 5.95, an average of 5 is displayed as the average.

24

Batch Process Tracking

Overview

You can use Batch Process Tracking to review the batch processes received and processed by date, week, and month. The pages display the total number of successful records processed and the number of records that failed or generated warnings, and indicate the average time required to process a thousand records for each batch type. The pages provide totals by date, week, and month.

> **Note:** This option is available only if the user has been assigned the *SystemAdmin* role. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information on assigning User Roles.

About this Chapter

This chapter contains the following information:

- [Daily Activity](#) - Describes the Daily Activity page.
- [Weekly Activity](#) - Describes the Weekly Activity page.
- [Monthly Activity](#) - Describes the Monthly Activity page.

Daily Activity

The Daily Activity page, displaying batch process tracking totals for a single day, is opened using the **System->Batch Process Tracking** menu option, or by clicking the Daily Activity tab at the Weekly Activity page or Monthly Activity page. The current date defaults when you first advance to Batch Process Tracking.

Figure 24-1: Daily Activity Page - Batch Process Tracking

Table 24-1: *Daily Activity Batch Process Tracking Page Key*

Item	Description
①	**Date Selection** - Use the left and right arrow keys to display batch process activity for an earlier or later date, or click **Today** to return to the current date. You can also click the displayed date to open a Calendar Menu, where you can select a date.
②	**Refresh** - Click **Refresh** to refresh the information displayed if you are viewing the current date.
③	**Daily Activity List** - A List of batch types that had activity on the displayed date. Only batch types that had activity on the displayed date are listed. See below for details.

The Daily Activity List displays the following information for each batch process that had any activity on the displayed date:

• **Batch Type** - The name of the batch type. Possible types include CardGroup, Customer, Item, LoyaltyRequest, MerchandiseHierarchy, RetailLocation, Transaction, and User.

• **Batch Count** - The total number of batches submitted for the batch type on the displayed date.

• **Record Count** - The total number of records in all batches submitted for the batch type on the displayed date.

• **Successes** - The total number of records that were processed successfully in all batches processed for the batch type on the displayed date.

• **Warnings** - The total number of warnings generated for all records submitted in all batches for the batch type on the displayed date.

• **Failures** - The total number of failures for all records submitted in all batches for the batch type on the displayed date.

- **Avg. Time per 1000 (HH:MM:SS)** - The average time used to process 1000 records for the batch type on the displayed date. Rounded down to the nearest whole second.

Weekly Activity

The Weekly Activity page that displays batch process tracking totals for a particular week is opened by clicking the Weekly Activity tab at the Daily Activity page or the Monthly Activity page. The week associated with the day displayed at the previous page defaults.


Figure 24-2: Weekly Activity Page - Batch Process Tracking

Table 24-2: *Weekly Activity Batch Process Tracking Page Key*

Item	Description
①	**Date Selection** - Use the left and right arrow keys to display batch process activity for an earlier or later week, or click **This Week** to return to the current week. The date of the first day of the week (Monday) is displayed. You can also click the displayed date to open a Calendar Menu, where you can select a date.
②	**Refresh** - Click **Refresh** to refresh the information displayed if you are viewing the current week.
③	**Weekly Activity List** - A List of batch process types that had activity on the displayed week, with activity for each date displayed. Only batch process types that had activity during the displayed week are listed. The dates displayed are based on GMT. See below for details.

The Weekly Activity List displays the following information for each batch process type that had any activity on a week in the displayed month:

- **Week** - Indicates the month and week for the activity displayed. Formatted as 9/3 2017-09-18 where 9 is the month, it is the third week of the month, and 2017-09-18 is the date on Monday of the week. Totals are displayed separately for each week. Just the headings are displayed for any weeks without activity, including future weeks for the current month.

- **Batch Type** - The name of the batch type with activity during the displayed week.

- **Batch Count** - The total number of batches submitted for the batch type on the displayed week.

- **Record Count** - The total number of records in all batches submitted for the batch type on the displayed week.

- **Successes** - The total number of records that were processed successfully in all batches processed for the batch type on the displayed week.

- **Warnings** - The total number of warnings generated for all records submitted in all batches for the batch type on the displayed week.

- **Failures** - The total number of failures for all records submitted in all batches for the batch type on the displayed week.

- **Avg. Time per 1000 (HH:MM:SS)** - The average time used to process 1000 records for the batch type on the displayed week. Rounded down to the nearest whole second.

Monthly Activity

The Monthly Activity page, displaying batch process tracking totals for a particular year, is opened by clicking the Monthly Activity tab at the Daily Activity page or Weekly Activity page. The year associated with the date displayed at the previous page defaults.

Figure 24-3: Monthly Activity Page - Batch Process Tracking.

Table 24-3: *Monthly Activity Batch Process Tracking Page Key*

Item	Description
(1)	**Date Selection** - Use the left and right arrow keys to display batch process activity for an earlier or later year, or click **This Year** to return to the current year. The date of the first day of the year is displayed. You can also click the displayed date to open a Calendar Menu, where you can select a date.
(2)	**Refresh** - Click **Refresh** to refresh the information displayed if you are viewing the current year.
(3)	**Monthly Activity List** - A List of batch processes that had activity on the displayed month, with activity for each month displayed. Only batch types that had activity in the displayed month are listed. Just the headings are displayed for any months when no activity occurred, including future months for the current year. See below for details.

The Monthly Activity List displays the following information for each batch process type that had any activity on the displayed month:

- **Batch Type** - The name of the batch type with activity during the displayed month.

- **Batch Count** - The total number of batches submitted for the batch type on the displayed month.

- **Record Count** - The total number of records in all batches submitted for the batch type on the displayed month.

- **Successes** - The total number of records that were processed successfully in all batches processed for the batch type on the displayed month.

- **Warnings** - The total number of warnings generated for all records submitted in all batches for the batch type on the displayed month.

- **Failures** - The total number of failures for all records submitted in all batches for the batch type on the displayed month.

- **Avg. Time per 1000 (HH:MM:SS)** - The average time used to process 1000 records for the batch type on the displayed month. Rounded down to the nearest whole second.

25

Exchange Rates

Overview

You can use the Exchange Rate page to review the most current exchange rates that have been set up for all currency conversions of PosLog transactions, review previous Exchange Rates, and create new Exchange Rates.

> **Note:** This option is available only if the user has been assigned the *SystemAdmin* role. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for more information on assigning User Roles.

About this Chapter

This chapter contains the following information:

- Exchange Rate - Describes the Exchange Rate page.
- Exchange Rate History Window - Describes the Exchange Rate History Window.
- Create Exchange Rate Window - Describes the Create Exchange Rate Window.

Exchange Rate

The Exchange Rate page, displaying the most current Exchange Rates for all existing currency conversions, is opened using the **System->Exchange Rate** menu option.

Figure 25-1: Exchange Rate Page

Table 25-1: *Exchange Rate Page Key*

Item	Description
1	**New Exchange Rate** - Click **New Exchange Rate** to open the Create Exchange Rate Window.
2	**Actions Menu** - Click to Actions Menu to refresh the information displayed.
3	**Exchange Rate List** - A List of all currency conversions that have had Exchange Rates created. The most current Exchange Rate that is not in the future is displayed. See below for details. You can highlight an Exchange Rate to open the Exchange Rate History Window.

The Exchange Rate List displays the following information for each currency conversion that has a current Exchange Rate:

- **Base Currency** - The name of the currency that is being converted (the "from" currency).

- **Exchange Currency** - The name of the currency that is being converted to (the "to" currency).

- **Exchange Rate** - The most current Exchange Rate that has been defined for the currency conversion. Up to 6 decimal positions. Any future Exchange Rates are not displayed.

- **Exchange Rate Date** - The date and time when the Exchange Rate became effective.

- **Create Date** - The date and time when the Exchange Rate was created.

- **Create User Id** - The user ID of the person who created the Exchange Rate.

Actions Menu

The Actions Menu for the Exchange Rate page contains the following option:

- **Refresh** - Refreshes the List with the most current Exchange Rates.

Exchange Rate History Window

The Exchange Rate History Window displays the Exchange Rate history for a currency conversion. The window title indicates the Base Currency to be converted and the Exchange Currency.
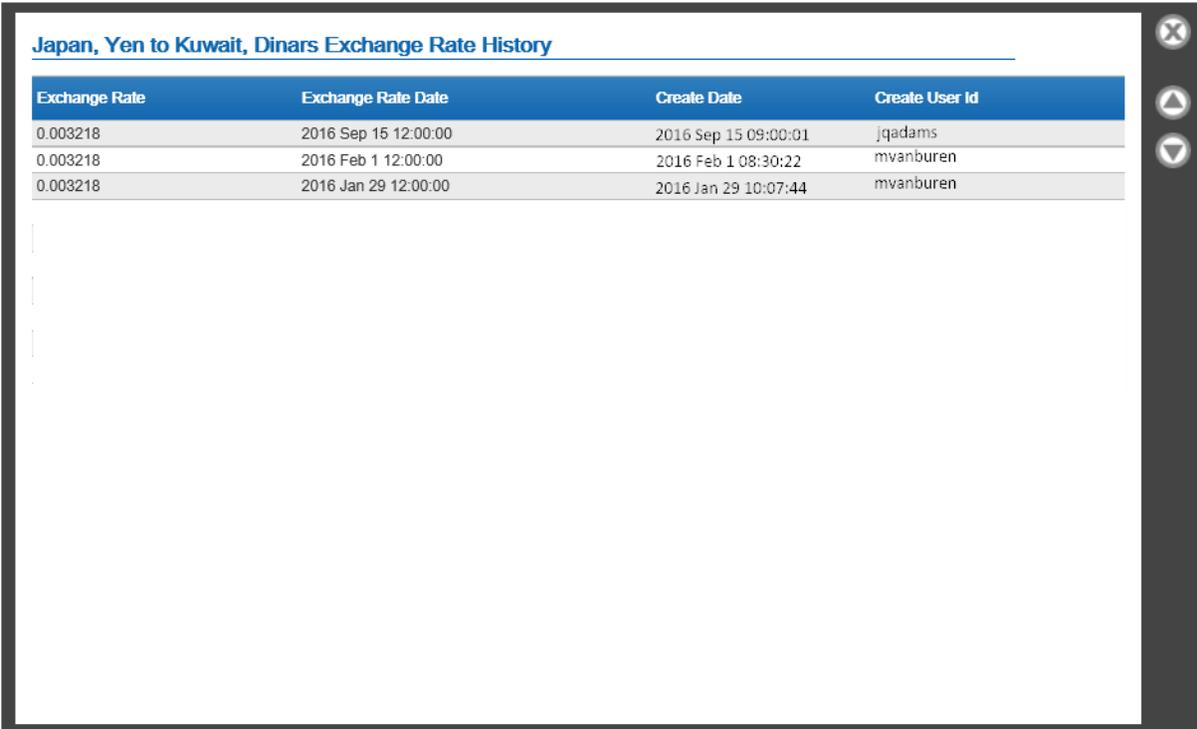
Figure 25-2: Exchange Rate History Window

- **Exchange Rate** - The Exchange Rate defined for the conversion of the Base Currency to the Exchange Currency at the effective date. Up to 6 decimal positions.

- **Exchange Rate Date** - The date and time when the Exchange Rate becomes effective. If this is a future date, it is not displayed at the Exchange Rate page.

- **Create Date** - The date and time when the Exchange Rate was created.

- **Create User Id** - The user ID of the person who created the Exchange Rate.

Create Exchange Rate Window

The Create Exchange window you use to create an Exchange Rate for a currency conversion is opened by using the **New Exchange Rate** menu option.
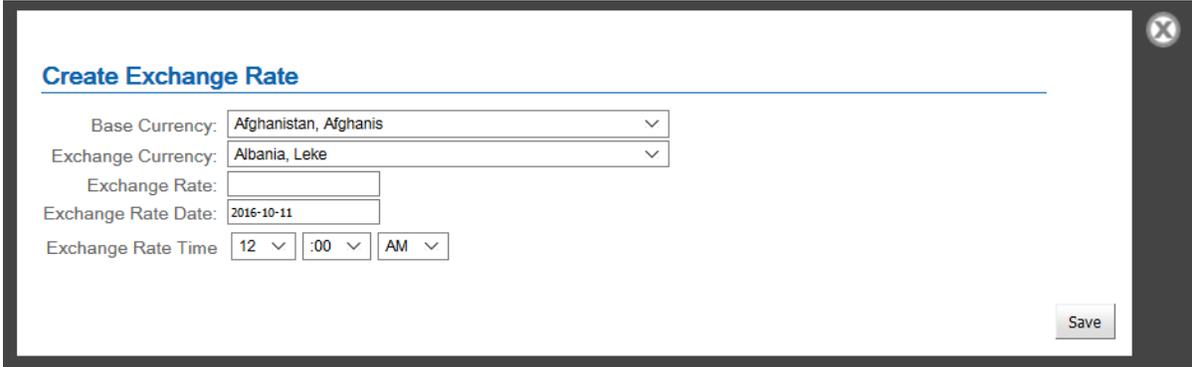
Figure 25-3: Create Exchange Rate Window

Complete the following fields and click Save to create a new Exchange Rate:

*   **Base Currency** - Select the name of the currency that is being converted.

*   **Exchange Currency** - Select the name of the currency that is being converted to.

*   **Exchange Rate** - Enter the Exchange Rate to use when converting the Base Currency to the Exchange Currency. Can include up to 11 positions before the decimal and up to 6 after.

*   **Exchange Rate Date** - The date when the Exchange Rate becomes effective. This date can be in the past or in the future.

*   **Exchange Rate Time** - The time on the Exchange Rate Date when the Exchange Rate becomes effective. This time can be in the past or in the future. If there is already an existing Exchange Rate for the Base Currency and Exchange Currency at the specified date and time, the page displays an error.

If the Exchange Rate Date or Exchange Rate Time are in the future, and there is no current Exchange Rate for the Base Currency and the Exchange Currency, then the currency conversion is not listed at the Exchange Rate page. The Exchange Rate page lists only currency conversions with current Exchange Rates.

26

File Review, Transfer, and Dashboard

Overview

The File Review, Transfer, and Dashboard pages provide options to review and work with files imported into or exported from Oracle Retail Customer Engagement Cloud Services.

An export file can be created when a process, such as a scheduled job, gathers the data and stages it to a table in the database. You can review, transfer, or download these files at the File Review List page.

You use the Transfers List page to create a Transfer that will be automatically associated to a file type, so it can transfer the file to a designated folder based on a defined schedule. For example, when you create the Customer Activities Sync Export File, it is automatically associated to an existing Transfer whose Source is defined as Customer Activity Sync. The Transfer definition controls the scheduling for transferring the Export file, and a System Configuration property defines the destination directory where the file should be written.

Similarly, you can create a Transfer to handle importing files from a designated folder based on a defined schedule. For example, you can define a Transfer to handle Loyalty Activity Import files by looking in a specified directory for a specified file name. You can also define another Transfer to handle all files with the .xml extension in a specified folder so that you can import XMLAPI files.

The Transfers List page and the Dashboard List are both available from the File Review List page if you have the required authority.

File data is stored in several tables in the database, including the FILE_HEADER and FILE_DATA tables. The Delete Stored Files scheduled job deletes old records periodically based on the date when the records were created.

This chapter includes a summary table of Source Names, Types, and Related Directory Properties for Outbound Transfers.

About this Chapter

This chapter describes the options available from the following pages:

- File Review List - Describes the File Review page, where you can review files and advance to other options, including downloading files, working with Transfers, or reviewing transferred files.

- Transfers List- Describes the Transfers page, where you can review or create Transfers.

- Dashboard List - Describes the Dashboard page, where you can review transferred files and retry a failed transfer.

File Review List

Use the File Review list page to view files available for transfer, download an individual file, or transfer a file to the SFTP server or a local file system. You can also use this page to open the Transfers List or Dashboard List pages. The File Review page is opened using the **System->File Review** menu option.

Figure 26-1: File Review List Page

Table 26-1: *File Review Page Key*

Item	Description
①	**Search** - Use the Filter Menus to filter the files displayed in the list. See Filter Menus. for more information.
②	**Clear Search** - Click **Clear** Search to set all search criteria in the Filter Menus to their defaults.
③	**Actions Menu** - Click the Actions Menu to display additional options.
④	**File Review List** - A List of files eligible for transfer. See below for details. You can highlight a file to open the File Detail Window.

The File ReviewList displays the following information for each file eligible for transfer:

• **Record Id** - The record ID identifying the file in the database.

• **File Name** - The name of the file. Can be assigned by the system or include user-defined elements as well as date and time stamps.

• **File Type** - The type of file. For example, a Type of EXPORT_SEGMENT indicates that it is a file containing Segment data that was extracted for export.

• **File Length** - The size of the file, typically in Kb or Mb.

• **Job Run Id** - Unique identifier of the job run.

• **Create Date** - The date and time when the file was created.

Actions Menu

The Actions Menu for the File Review page contains the following options:

• **Transfers** - Opens the Transfers List page.

• **Dashboard** - Opens the Dashboard List page.

• **Refresh** - Refreshes the List with the most current files.
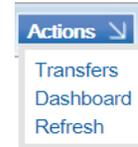
Filter Menus

The File Review List page includes the following filter menus:

Figure 26-2: File Review Filter Menus

• **File Type** - Selection Menu for you to select a file type, such as AWARD_SYNC_EXPORT.

• **Exclude Zero Length File** - Indicates whether to exclude empty files from the list. Selected by default.

• **Date Range** - The starting date and ending date to include in the list. The End Date is set to the current date, and the start date is set to two months before the current date.

• **File Name** - The name of the file (uses a Matching Rule Menu).

Click **Search** to perform the search. Customer Engagement returns a List of all the file records that match the entered search criteria.

File Detail Window

The File Detail Window displays detailed information about a file listed at the File Review List page or the Dashboard List page. Click a file or a transfer attempt to open this window.
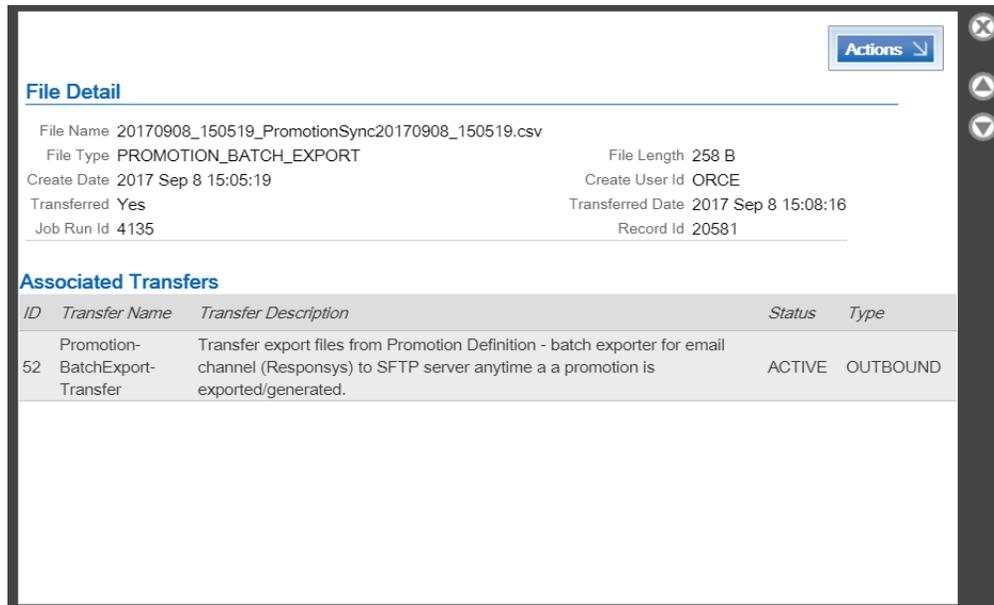
Figure 26-3: File Detail Window

- **File Detail** - This area of the window displays information specific to the file.

  - **File Name** - The name of the file. Can be assigned by the system or include user-defined elements as well as date and time stamps.

  - **File Type** - The type of file. For example, a Type of EXPORT_SEGMENT indicates that it is a file containing Segment data that was extracted for export.

  - **Create Date** - The date and time when the file was created.

  - **Transferred** - Set to Yes if the file has been transferred.

  - **Job Run Id** - Unique identifier of the job run.

  - **File Length** - The size of the file, typically in Kb or Mb.

  - **Create User Id** - The ID of the user who created the file. May be set to ORCE, or may be blank if the user ID is not known.

  - **Transferred Date** - The date when the file was transferred.

  - **Record Id** - The record ID identifying the file in the database.

- **Associated Transfers** - This area of the window displays information about Transfers that are automatically associated to files based on the file type. For example, when you create the Customer Activities Sync Export File, it is automatically associated to an existing Transfer whose Source is defined as Customer Activity Sync. The Transfer definition controls the scheduling for transferring the Export file, and a System Configuration property defines the destination directory where the file should be written.

  - **ID** - The unique identifier for the Transfer.

- **Transfer Name** - The name specified when the Transfer was created through the File Transfer Wizard.

- **Transfer Description** - The description specified when the Transfer was created through the File Transfer Wizard.

- **Status** - Indicates whether the Transfer is ACTIVE or INACTIVE.

- **Type** - Indicates whether the Transfer is OUTBOUND, indicating it transfers the contents of a generated export job, or BATCH, indicating that it transfers all eligible files in a directory, or specific files in a directory.

Download File

In the File Detail Window, click the **Download** button to download a copy of the file or open it in an associated program, based on your system and browser settings.

This option is available only when you open the window from the File Review List page.

Transfer to Server

In the File Detail Window, select Transfer to Server from the Actions menu to transfer the file based on the associated transfer(s). The destination is based on the associated System Configuration property, and the transport Type of OUTBOUND or BATCH is based on the Transfer definition.
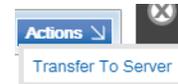
This option is available only when you open the window from the File Review List page.

Retry Transfer

In the File Detail Window, select Retry from the Actions menu to attempt again to transfer the file.

This option is available only when you open the window from the Dashboard List page, and only when the status is TRANSFER_FAILED. Otherwise, the Actions menu is not enabled when you open the window from the Dashboard List page.

Transfers List

Use the Transfers list page to review Transfers you have created to transfer files, or open the File Transfer Wizard to create a new Transfer or edit an existing Transfer. The Transfers page is opened by selecting Transfers from the Actions Menu at the File Review List page.
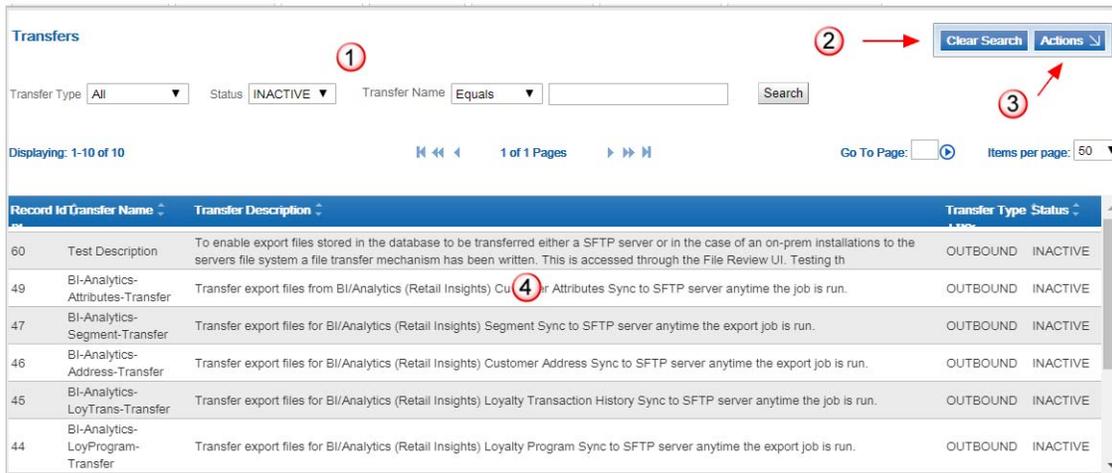
Figure 26-4: Transfers List Page

Table 26-2: *Transfers Page Key*

Item	Description
①	**Search** - Use the Filter Menus to filter the Transfers displayed in the list. See Filter Menus. for more information.
②	**Clear Search** - Click **Clear** Search to set all search criteria in the Filter Menus to their defaults.
③	**Actions Menu** - Click the Actions Menu to display additional options.
④	**Transfer List** - A List of Transfers. See below for details. You can highlight a Transfer to open the Transfer Detail Window.

The Transfer list displays the following information for each listed Transfer:

- **Record Id** - The unique number identifying the Transfer.

- **Transfer Name** - The name assigned to the Transfer.

- **Transfer Description** - The description assigned to the Transfer.

- **Transfer Type** - Indicates whether the Transfer is OUTBOUND, indicating it transfers the contents of a generated export job, or BATCH, indicating that it transfers all eligible files in a directory, or specific files in a directory.

- **Status** - Indicates whether the Transfer is ACTIVE or INACTIVE.

Actions Menu

The Actions Menu for the Transfer page contains the following options:

- **Create** - Create a new Transfer. See the File Transfer Wizard.
- **Refresh** - Refreshes the List with the most current Transfer information.

Filter Menus

The Transfers List page includes the following filter menus:

Figure 26-5: Transfer Filter Menus

- **Transfer Type** - Enables you to select a Transfer Type of OUTBOUND for exports or BATCH, or leave set to All.
- **Status** - Enables you to select a Status of ACTIVE or INACTIVE, or leave set to All.
- **Transfer Name** - The name of the Transfer (uses a Matching Rule Menu). The Transfer Name is user-defined through the File Transfer Wizard.

Transfer Detail Window

The Transfer Detail Window displays the information about a Transfer available to transfer files for export or import, as defined through the File Transfer Wizard.
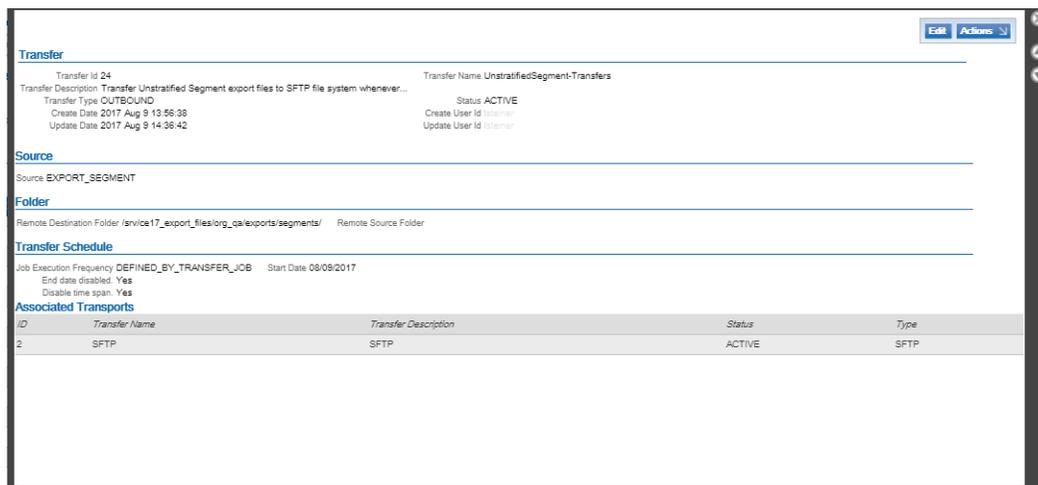
Figure 26-6: Transfer Detail Window

- **Transfer** - This area of the window displays basic information about the Transfer.
    - **Transfer Id** - A unique number identifying the Transfer.
    - **Transfer Description** - The description of the Transfer.
    - **Transfer Type** - Transfer type of OUTBOUND for exports, or BATCH for files that need to be retrieved.
    - **Create Date** - The date and time when the Transfer was initially created.
    - **Update Date** - The date and time when the Transfer was most recently updated. The same as the Create Date if the Transfer has not been updated.

- **Transfer Name** - The name of the Transfer.

- **Status** - Indicates whether the Transfer is ACTIVE or INACTIVE.

- **Create User Id** - The ID of the user who created the Transfer.

- **Update User Id** - The ID of the user who most recently updated the Transfer. The same as the Create User Id if the Transfer has not been updated.

• **Source** - Displays the Source defined for transfer. Can identify a process, such CUSTOMER_ACTIVITY_SYNC_EXPORT, or can identify a file name for a BATCH Transfer.

• **Folder** - Specifies either the source for a BATCH Transfer or the destination for an OUTBOUND Transfer:

  - **Remote Destination Folder** - The directory where export files are transferred to. Defaults from a related System Configuration property. For example, the destination folder for sources such as the CUSTOMER_ACTIVITY_SYNC_EXPORT default from the Customer Batch Exporter Export Directory property. Blank for a BATCH Transfer.

  - **Remote Source Folder** - The directory from which a BATCH Transfer should retrieve files. From the Auto_Fileset Import Directory for an AUTO_FILESET batch type, and from the Filesets Import Directory for a FILESET batch type. Blank for an OUTBOUND Transfer.

• **Transfer Schedule** - Displays general information about the schedule for the Transfer:

  - **Job Execution Frequency** - The Job Execution Frequency selected through the File Transfer Wizard.

  - **End date disabled** - Set to Yes if there is no date specified for the Transfer to become inactive; otherwise, not displayed.

  - **End Date** - The date when the Transfer becomes inactive. Displayed only if the End date is not disabled.

  - **Disable time span** - If set to Yes, indicates that there is no range of times when the job is eligible to run.

  - **Start Time** - The time when the job should start, if scheduled

  - **Execution Day(s)** - The days of the week when the job is eligible to run, if scheduled to run weekly, or the day of the month when the job is eligible to run, if scheduled to run monthly.

  - **Start Date** - The date when the Transfer becomes effective.

  - **End Time** - The time of day when the job becomes ineligible to run.

• **Associated Transports** - Lists the transport types associated with the Transfer:

  - **ID** - A unique number identifying the transport.

  - **Transfer Name** - The type of transport. Typically FILE or SFTP.

  - **Transfer Description** - The description of the transport. Typically FILE or SFTP.

  - **Status** - Indicates whether the transport is ACTIVE or INACTIVE.

  - **Type** - The type of transport. Typically FILE or SFTP.

Edit

In the Transfer Detail Window, click the **Edit** button to open the File Transfer Wizard.

Actions Menu

The Actions Menu for the Transfer Detail Window contains the following options:

- **Toggle (In)Active** - Select this option to set a currently active Transfer to INACTIVE, or to set a currently inactive Transfer to ACTIVE.

- **Delete** - Select this option to delete the Transfer. The Transfer is deleted immediately.

File Transfer Wizard

To create a new file Transfer:

1. In the Transfers List page, click **Create** in the Actions Menu.

   The File Transfer creation Wizard opens.

Figure 26-7: Create Transfer Wizard General Information Step

2. Enter the required information in the General Information step.

   The General Information step has the following fields:

   - **Name** - The name of the Transfer.

   - **Description** - The description of the Transfer.

   - **Transfer Type** - Options for this Selection Menu:

     * OUTBOUND - In the Source step, you select the name of an export job generating the file(s) to transfer.

     * BATCH - The Batch Type Selection Menu opens for you to select whether to retrieve all eligible files in a directory, or specific files in a directory.

   - **Batch Type** - This Selection Menu opens if the Transfer Type is BATCH:

     * AUTO _FILESET - In the Source step, you specify the name of the XML file(s) to retrieve. You can specify a Regular Expression to select files that match your entry.

     * FILESET - You do not need to select a Source, so you advance directly to the Remote Folder Details step, where the remote source folder is displayed. All files in the remote source folder are retrieved.

   - **Status** - Use this Selection Menu to select a status of ACTIVE or INACTIVE.

3. When you have finished entering information, click **next**.

4. The next step opens. This step varies depending on your Transfer Type and Batch Type selections at the General Information step.

    If you selected a Transfer Type of OUTBOUND, you advance to the Source step, where you select the Name of an Outbound export from the Selection Menu.

Figure 26-8: Source Step when Transfer Type is Outbound

    When you select the Name of a source, the Type is displayed to the right. For example, if you select a Name of Segment Export (.csv and .xml), a Type of EXPORT_SEGMENT is displayed. See Source Names, Types, and Related Directory Properties for Outbound Transfers for a table listing possible source Names, Types, and the properties that define the Remote Folders.

5. If you selected a Transfer Type of BATCH and a Batch Type of AUTO FILESET, you advance to the Source step, where you enter an XML file name, or a Regular Expression indicating the rules for the name of the file to retrieve, in the Source field.
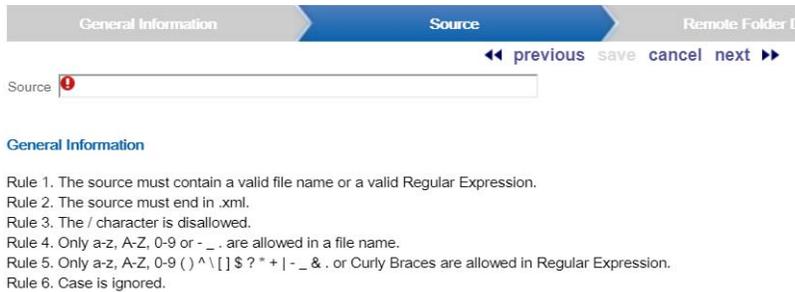
Figure 26-9: Source Step when Transfer Type is Batch/Type is Auto Fileset

    This step displays additional rules under General Information, describing the requirements for your entry of either an XML file name or a Regular Expression.

6. When you have finished the Source step, click **next**.

7. You advance to the Remote Folder Details step after completing the Source step, unless you selected a Transfer Type of BATCH and Batch Type of FILESET at the General Information step; in that case, you advance directly to the Remote Folder Details step from the General Information step.

    The default Remote Source Folder is displayed.

Figure 26-10: Remote Folder Details Step when Transfer Type is Batch/Type is Fileset

    The Remote Folder Details step displays the Remote Source Folder for BATCH Transfer Types, and the Remote Destination Folder for OUTBOUND Transfer Types. Your selections at the previous steps determine this folder:

    -   If you selected a Transfer Type of BATCH and a Batch Type of FILESET, the Remote Source Folder is from the Filesets Import Directory property.

- If you selected a Transfer Type of BATCH and a Batch Type of AUTO FILESET, the Remote Source Folder is from the Auto_Fileset Import Directory property.

- If you selected a Transfer Type of OUTBOUND, the Remote Folder Step displays the Remote Destination Folder, which is from the related property. For example, if you selected a Name of Segment Export (.csv and .xml) at the Source step, the Remote Destination Folder displayed is from the Customer Segment Export Directory property. See <u>Source Names, Types, and Related Directory Properties for Outbound Transfers</u> for a listing.

Source	Remote Folder Details	Transfer Schedule

◄◄ previous   save   cancel   next ►►

Remote Destination Folder : / srv/CE17_export_files/org_qa/exports/segments/

Figure 26-11: Remote Folder Details when Transfer Type is Outbound

8. Click **next** when you are finished.

   The Transfer Schedule step opens.

9. Select the Job Execution Frequency.

Remote Folder Details	Transfer Schedule	Transport

◄◄ previous   save   cancel   next ►►

Transfer Schedule

Job Execution Frequency   (Please select)   ▼
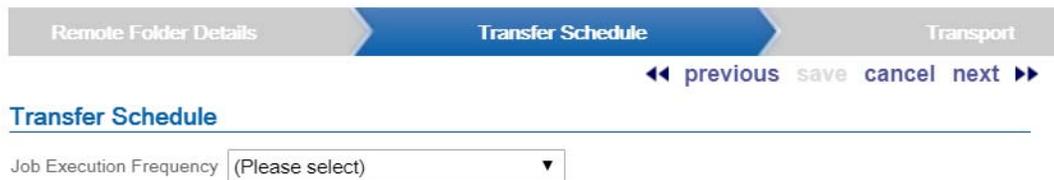
Figure 26-12: Transfer Schedule Step

Possible **Job Execution Frequency** options:

* DEFINED_BY_TRANSFER_JOB - The Transfer is eligible to be run based on the File Transfer Process Interval property. The default interval is 60 seconds. With this option, you select the Start Date and Disable End Date. If Disable End Date is not selected, you also select the End Date.

* ONCE_IMMEDIATELY - The Transfer runs on the next iteration, once only, and is then marked as INACTIVE. No additional options are displayed.

* ONCE_LATER - The Transfer runs once after the Start Date and Start Time, and is then marked as INACTIVE.

* DAILY - Newly created files associated with the Transfer are eligible for transfer each day after the Start Date and before the End Date, if any, and within any specified Time Span.

* DAILY_BUSINESS_DAYS_ONLY - Newly created files associated with the Transfer are eligible for transfer each day after the Start Date and before the End Date, if any, and within any specified Time Span, but only on business days (Monday through Friday).

* WEEKLY - Newly created files associated with the Transfer are eligible for transfer each week after the Start Date and before the End Date, if any, within any specified Time Span, on the first selected Day of Week.

* MONTHLY - Newly created files associated with the Transfer are eligible for transfer each month after the Start Date and before the End Date, if any, within any specified Time Span, on the selected Day of Month.

Depending on the selected Job Execution Frequency, the following additional details are displayed:

* **Start Date** - The first date when the Transfer will run, if active. Defaults to the current date.

* **Disable End Date** - If selected, indicates that there is no specified date when the Transfer will stop running. Selected by default. When this flag is selected, the End Date is not available for selection.

* **End Date** - The last date when the Transfer will run. This field is available only when Disable End Date is not selected, and if the Job Execution Frequency indicates a regular schedule, rather than ONCE_IMMEDIATELY or ONCE_LATER.

* **Start Time** - The time when the job should start, if scheduled. Includes fields to specify the hour, minutes, and AM or PM. This field is available only when the Job Execution Frequency is not DEFINED_BY_TRANSFER_JOB or ONCE_IMMEDIATELY.

* **Disable Time Span** - If selected, indicates that there is requirement to check a range of times within which the job can run. Selected by default. This field is available only when the Job Execution Frequency indicates a regular schedule, including DAILY, DAILY_BUSINESS_DAYS_ONLY, WEEKLY, or MONTHLY.

* **Start Time** - The time of day when the job becomes eligible to run. Set to 1:00 AM by default. You can select the hour, minutes, and AM/PM for the Start Time. These fields are available only when the Job Execution Frequency indicates a regular schedule, including DAILY, DAILY_BUSINESS_DAYS_ONLY, WEEKLY, or MONTHLY, or when it is set to ONCE_LATER.

* **End Time** - The time of day when the job becomes ineligible to run. Set to 1:00 AM by default. You can select the hour, minutes, and AM/PM for the End Time. These fields are available only when the Job Execution Frequency indicates a regular schedule, including DAILY, DAILY_BUSINESS_DAYS_ONLY, WEEKLY, or MONTHLY, and the Disable Time Span flag is not selected.

* **Day of Week** - The days of the week when the job is eligible to run. All days are unselected by default. These fields are available only when the Job Execution Frequency is set to WEEKLY.

* **Day of Month** - The day of the month when the job is eligible to run. Available only when the Job Execution Frequency is set to MONTHLY.

10. Click **next** when you are finished.

The Transport step opens.

Figure 26-13: Transport Step

Click **Add** to open a selection window:
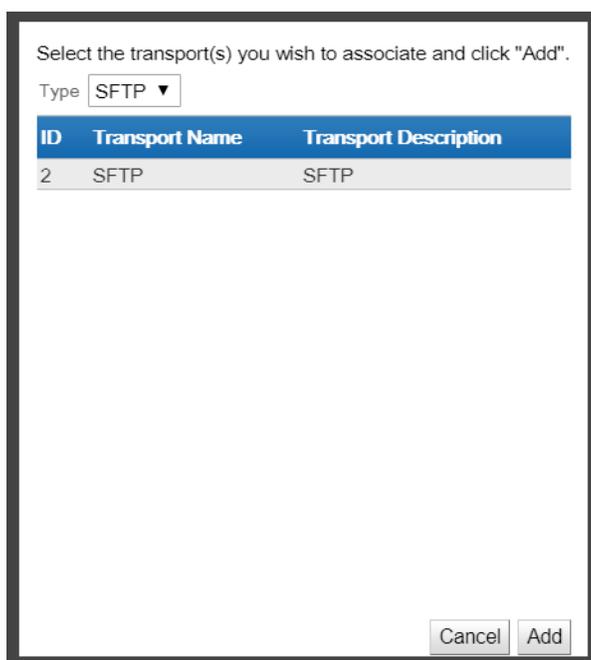
Figure 26-14: Select Transport Window

Select a Transport Type of either SFTP or FILE, and click **Add**. The Type is added.
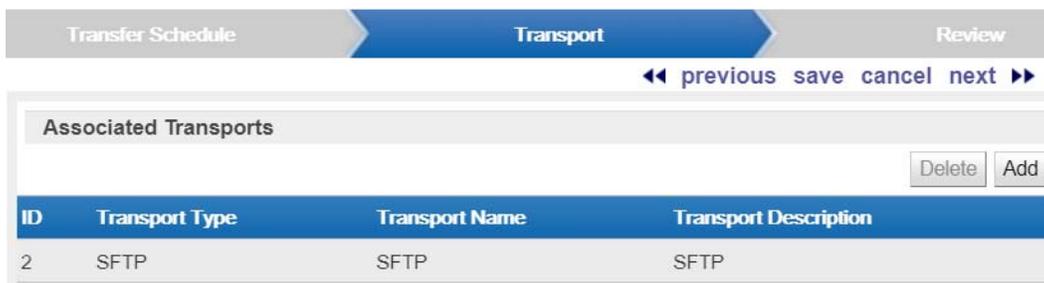
Figure 26-15: Associated Transports - Type Added

11. Click **next** when you are finished.

The Review step opens.

Figure 26-16: Review Step

12. Review the entered information to ensure that it is correct.

    - Click **save** to save the Transfer with the current settings and return to the Transfers List.

    - Use Wizard Navigation to return to an earlier step and make any necessary changes.

    - Click **cancel** to delete all information for a new Transfer, or cancel all changes for an existing Transfer, and return to the Transfers List.

Dashboard List

Use the Dashboard List page to review pending and completed transfer attempts for files. The Dashboard page is opened by selecting Dashboard from the Actions Menu at the File Review List page.

Figure 26-17: Dashboard List Page

Table 26-3: *Dashboard Page Key*

Item	Description
①	**Refresh** - Refreshes the List with the most current transfer attempts. **Note:** The **Actions** menu at the Dashboard List page is not currently implemented.
②	**File Transfer Attempts List** - A List of pending and completed file transfer attempts. See below for details. You can highlight a transfer attempt to open the File Detail Window.

The Dashboard displays the following information for each transfer attempt:

• **Transfer Type** - Indicates whether the transfer type is OUTBOUND, indicating it transfers the contents of a generated export job, or BATCH, indicating that it transfers all eligible files in a directory, or specific files in a directory.

• **Transport** - The type of transport. Typically FILE or SFTP.

• **File Name** - The name of the file. Can be assigned by the system or include user-defined elements as well as date and time stamps.

• **Status** - The current status of the transfer attempt:

- NEW_ENTRY – The transfer will proceed when it is in date / time range, as long as there are no other transfers taking place for the same file using the same transport.

- WAITING – The transfer is waiting for either a previous transfer to complete, or there are no available threads to start the transfer.

- TRANSFER – The file is currently being transferred to the remote location.

- COMPLETED – The transfer completed successfully.

- TRANSFER FAILED – The transfer failed after successive retries.

- TRANSFER RETRY – The transfer failed and will be retried when the retry count reaches zero, providing the maximum number of attempts has not been exceeded.

- HISTORICAL – The transfer completed successfully. This is now a historical record.

• **Retry** - The current retry count for a failed transfer; otherwise, set to 0.

• **Attempt** - The number of times the transfer has been attempted. Set to 0 if the transfer completed successfully.

• **Message** - A message describing the current status of the transfer attempt, such as "transfer completed."

Source Names, Types, and Related Directory Properties for Outbound Transfers

The following table lists the available Source Names, the related Transfer Types, and the System Configuration properties that define the Remote Destination Directories for each. This information is provided as background to support setting up File Transfers for OUTBOUND Transfers. See the File Transfer Wizard for information on setting up File Transfers.

Name	Type	Property
Anniversary Awards	ISSUE_ANNIVERSARY_ AWARDS	Award Export Directory
Award Sync	AWARD_SYNC_EXPORT	Award Batch Exporter Export Directory
Card Series	EXPORT_CARDS	Card Series Export Directory
Customer Activity Sync	CUSTOMER_ACTIVITY_ SYNC_ EXPORT	Customer Batch Exporter Export Directory
Customer Address Sync	CUSTOMER_ADDRESS_ SYNC_ EXPORT	Retail Insights Batch Exporter Export Directory
Customer Campaign / Offers	EXPORT_OFFER	Promotion Export Directory
Customer Household Sync	CUSTOMER_HOUSEHOLD_ SYNC_EXPORT	Retail Insights Batch Exporter Export Directory
Distribute Loyalty Awards	LOYALTY_DISTRIBUTION	Loyalty Export Directory
Generated Card Series	GENERATE_CARD_SERIES	Card Series Export Directory
Log File For Card / Card Attribute Import Errors	GENERATE_CARD_SERIES_ LOG	Card Series Import Upload Directory
Loyalty Award Transaction Sync	LOYALTY_AWARD_TRANS_ SYNC_EXPORT	Retail Insights Batch Exporter Export Directory
Loyalty Awards	LOYALTY_AWARD	Loyalty Export Directory
Loyalty Program Sync	LOYALTY_PROGRAM_ SYNC_EXPORT	Retail Insights Batch Exporter Export Directory
Loyalty Transaction Sync	LOYALTY_TRANS_SYNC_ EXPORT	Retail Insights Batch Exporter Export Directory
Mass Card Activation Log	MASS_ACTIVATE_CARDS	Card Series Import Upload Directory
Mass Card Deactivation Log	MASS_DEACTIVATE_ CARDS	Card Series Import Upload Directory
Notify Award Expiration	NOTIFY_AWARDS_EXPIRE	Award Export Directory
Notify Card Renewal	NOTIFY_CARD_RENEWAL	Card Export Directory

Name	Type	Property
Promotion Awards	GENERATE_PROMO_ AWARDS	Award Export Directory
Promotion Batch Exports	PROMOTION_BATCH_ EXPORT	Directory for Promotion Batch Export Files
Promotion Event Document	EVENT_DOCUMENT	Promotion Export Directory
Promotion Exports	EXPORT_PROMOTION_ XML	Promotion Export Directory
Promotion Serialized Coupons	EXPORT_PROMOTION_ CODES	Promotion Export Directory
RI Attributes Sync	RI_CUSTOMER_ATTRIBUTES_ SYNC_EXPORT	Retail Insights Batch Exporter Export Directory
RI Customer Sync	RI_CUSTOMER_SYNC_ EXPORT	Retail Insights Batch Exporter Export Directory
RI Loyalty Awards Sync	RI_LOYALTY_ACCOUNT_ SYNC_EXPORT	Retail Insights Batch Exporter Export Directory
RI Package Exporter zip	RETAIL_INSIGHTS_ PACKAGE_ EXPORTER	Retail Insights Batch Exporter Export Directory
RI Segment Sync	RI_SEGMENT_SYNC_ EXPORT	Retail Insights Batch Exporter Export Directory
Responsys Attributes Sync	RE_CUSTOMER_ATTRIBUTES_ SYNC_EXPORT	Customer Batch Exporter Export Directory
Responsys Customer Sync	RE_CUSTOMER_SYNC_ EXPORT	Customer Batch Exporter Export Directory
Responsys Loyalty Awards Sync	RE_LOYALTY_ACCOUNT_ SYNC_EXPORT	Account Batch Exporter Export Directory
Responsys Segment Sync	RE_SEGMENT_SYNC_ EXPORT	Directory for Segment Batch Export Files
Segment Export (.csv and .xml)	EXPORT_SEGMENT	Customer Batch Exporter Export Directory
Segment Trend Data	SEGMENT_TREND_EXPORT	Customer Segment Export Directory
System Configuration Export	EXPORT_CONFIG	Configuration Export Directory
Tender Activity Report	EXPORT_TENDER_ ACTIVITY_ REPORT	Tender Activity Reports Export Directory
Tender Sync	TENDER_SYNC_EXPORT	Account Batch Exporter Export Directory

Name	Type	Property
Transfer Notifications	POINT_TRANSFER_ NOTIFICATION	Responsys - Points/ Awards Transfer Notification Batch Export Directory
Transforms For Promotion Data Export	EXPORT_PROMOTION_TXT	Location Specific Transform Export Directory
Transforms For Promotion Data Export – Store Level – Compressed	EXPORT_PROMOTION_ZIP	Location Specific Transform Export Directory

27

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 Customer Engagement 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
- Customer Contact
- Customer Attributes
- Purchase Activity
- Basic Programs
- Segment Elements
- Promotion Activity
- Strategic Segments
- Loyalty Segments
- Social Networks
- Social Profiles

These categories are available at the Segment Query step of the Create Segment wizard, and control the customers selected for the Stratified or Unstratified Segment.

Stratified Queries

The following is a list of the Stratified Query categories:

- [Loyalty Summary](#)

- [Transaction Criteria](#)

- [Line Item Detail](#)

These categories control how the customers are broken out into strata for a Stratified Segment, and are available at the Strata Query step of the Create Segment Wizard if a Strata Type of Loyalty or Transaction was selected at the Strata Field step.

The Strata Query step is not available when a Strata Type of Customer was selected at the Strata Field step. Also, this step is not available for an Unstratified Segment.

Segment Queries

The following categories are available at the Segment Query step of the Create Segment wizard, and control the customers to select for the Stratified or Unstratified Segment.

Customer Demographics

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

Customer ID	This query returns active and valid Customers whose Customer ID matches your input.
	• **Customer whose Customer ID** - The Customer ID of the Customer.
Customer City	This query returns active and valid Customers whose primary and active address is in the city you have specified.
	• **Customer City** - The city of the Customer's primary address.
Customer State	This query returns active and valid Customers whose primary and active address is in the state you have specified.
	• **Customer State** - The state or province of the Customer's primary address.
Postal Code	This query returns active and valid Customers whose primary and active address is in the postal code (zip code) you have specified. Use only five digits for US zip codes.
	• **Postal Code** - The Postal Code or ZIP Code of the Customer's primary address.

Postal Code Vicinity	This query returns active and valid Customers whose addresses are within a radius of a specified number of miles of a specified location. • **Customer living within ___ miles** - The distance within which to search for Customer addresses. • **of location id** - The Location ID of the location. ⊟ 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 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. Active Customers ▾ **Active Customers**

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**. Mail Contact Permission ▾ Mail contact Allowed ▾
Address Type Code	This query returns all Customers whose address type matches what you entered. • **Address Type Code** - The type of address. Address Type Code ▾ Address type = ▾
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 Contact Permission ▾ Phone contact Allowed ▾

Phone Type	This query returns all Customers whose phone type matches your selection.
	• **Phone Type** - The type of phone.

Email Contact Permission	This query returns all Customers who have given permission to be contacted by email.
	• **Email Contact Permission** - The email contact permission for the Customer. The options are Allowed **[DEFAULT]** and Not Allowed.

Valid Email Addresses	This query returns all Customers whose email address has been validated or not validated.
	• **Valid Email Addresses** - Whether the email address has been validated. Your options are True **[DEFAULT]** or False.

Email Address Type	This query returns all Customers whose email type matches your selection.
	• **Email Address Type** - The type of email address.

Customer Attributes

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

String Attribute Values	This query returns all Customers with a string attribute whose value matches your entry.
	• **Customers with attribute name** - The name of the string attribute.
	• **having a string value** - The value of the string.

Logical Attribute Values	This query returns all Customers with a logical attribute that has been assigned the selected value.
	• **Customers with attribute name** - The name of the logical attribute.
	• **having value** - The value of the attribute. Your options are True [DEFAULT] or False.

Date Attribute Values	This query returns all Customers with a date attribute that has been assigned a date between the entered values.
	• **Customers with attribute name** - The name of the date attribute.
	• **having dates between X and Y** - The range of date values to include in the results.

Purchase Activity

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

Lifetime Sales	This query returns all Customers whose lifetime sales amount matches what you have entered.
	• **Total sales** - The amount of lifetime sales. The amount must be an integer between 0 and 1,000,000.

Lifetime Returns	This query returns all Customers whose lifetime returns amount matches what you have entered.
	• **Returns total** - The amount of lifetime returns. The amount must be an integer between 0 and 1,000,000.

Year-To-Date Sales	This query returns all Customers whose year-to-date sales amount matches what you have entered.
	• **YTD Sales** - The amount of sales in the year to date. The amount must be an integer between 0 and 1,000,000.

Year-To-Date Returns	This query returns all Customers whose year-to-date returns amount matches what you have entered.
	• **YTD returns** - The amount of returns in the year to date. The amount must be an integer between 0 and 1,000,000.

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 [Department ▼] 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 [Item Test 2 ▼] 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 [Item6TestDATE ▼] 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 Item logical unique ▾
Attribute Value True ▾
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 Item4Test ▾
Attribute Value = ▾ [_____]
in last [____] days

Basic Programs

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

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 January
Happy Anniversary	This query returns all active Customers who have a valid address, have given permission to be contacted by mail, and whose signup date is in the month you selected ([DEFAULT] = **January**). Happy Anniversary ▼ Sign-up Month January
Thank You!	This query returns active and valid Customers who have spent at least X dollars in the last Y days. The amount spent must be a number between 1 and 1,000,000 and the number of days must be a number between 1 and 1000 (i.e. 100 dollars in the last 30 days). 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 Strata Level	This query returns all Customers in a specified strata level within a Segment. • **Customers in Segment ID** - The ID for the segment. • **with Strata Level** - The ID for the strata level within the segment.

Promotion Activity

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

Promotion Responders	This query returns all active Customers who have responded to the promotion specified (if **Yes** is selected in the dropdown selection) or not responded to the promotion (if **No** is selected). The promotion can be any valid promotion in your organization.
Campaign Responders	This query returns all active Customers who have responded to the campaign specified (if **Yes** is selected in the dropdown selection) or not responded to the campaign (if **No** is selected). The campaign can be any valid campaign in your organization.

Strategic Segments

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

Customer Status	This query returns valid Customers whose status matches the one you have selected. Your options are "Active" [DEFAULT] and "Inactive".

Mail File	This query returns all active Customers who have given permission to be contacted by mail and have a valid address.	
Mail File By Home Location	This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by mail, and have a valid address.	
Phone File	This query returns all active Customers who have given permission to be contacted by telephone and have a valid telephone number that is not their Fax number.	
Phone File By Home Location	This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by phone, and have a valid telephone number that is not their Fax number.	
Email File	This query returns all active Customers who have given permission to be contacted by email and have a valid email address.	
Email File By Home Location	This query returns all active Customers whose home location is or is not the one you have specified, have given permission to be contacted by email, and have a valid email address.	

Loyalty Segments

In the following queries, you can find the Program IDs by selecting **Account -> Card Definition** from the Application Menu. The resulting list page will list the Programs. Within the Card Definition, select the Card Prefix associated with the Program; Customer Engagement 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.

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

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 [All   ▾]
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 [Members   ▾]
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	All
Location Attribute Name	
Location Attribute Value	
Business Date in Last X Days	
Accumulated point value	=

Social Networks

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

| 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

This category is available at the Segment Query step of the Create Segment wizard, and controls the customers to select for the Stratified or Unstratified Segment.

| 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: Male ▾
Location	This query returns all Customers living certain location, as specified in their social profile. • **Customers Location** - Customer location. ⊟ LOCATION ▼ Customers Location: [ ]

Strata Queries

These categories control how the customers are broken out into strata for a Stratified Segment, and are available at the Strata Query step of the Create Segment Wizard if a Strata Type of Loyalty or Transaction was selected at the Strata Field step.

The Strata Query step is not available when a Strata Type of Customer was selected at the Strata Field step. Also, this step is not available for an Unstratified Segment.

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 Active ▾

Loyalty Activity Type by Date Range	This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within a specified date range.
	• **All members of Program** - The Program to which the members belong.
	• **Program Level** - The Program Level to which the members belong.
	• **activity type** - The activity performed.
	• **with activities between dates of** - The beginning of the date range.
	• **AND** - The end of the date range.

Loyalty Activity Type in Last X Days	This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within a certain number of days in the past.
	• **All members of Program** - The Program to which the members belong.
	• **Program Level** - The Program Level to which the members belong.
	• **activity type** - The activity performed.
	• **with activities in the last** - The number of days in the past for the range.

Loyalty Activity Type YTD	This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within the year to date.
	• **All members of Program** - The Program to which the members belong.
	• **Program Level** - The Program Level to which the members belong.
	• **Activity Type** - The activity performed.

Loyalty Activity Type LTD	This query returns all the Customers who are members of a Program at a certain Program Level who have performed a certain account activity within the lifetime to date of the account. • **All members of Program** - The Program to which the members belong. • **Program Level** - The Program Level to which the members belong. • **Activity Type** - The activity performed. Loyalty Activity Type LTD ▾ All members of program [ ] Program Level [ ] Activity Type [All ▾]

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 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 [Department ▾]
Item Value [   ]
From Location attribute Name [   ]
Location attribute Value [   ]
in last [   ] days