

Oracle® Retail Customer Engagement

Release Notes

Release 17.0.1

E93264-01

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This document highlights the major changes for Release 17.0.1 of Customer Engagement.

Overview

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

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

Hardware and Software Requirements

See the *Oracle Retail Customer Engagement Installation Guide* Release 17.0 for the hardware and software requirements.

Browser Requirements

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

- Internet Explorer 9, 10, and 11
- Firefox 38 or higher

Functional Enhancements

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

Default Contact Permissions

A new Contact Permissions configuration property specifies whether a new customer's contact permissions settings (mail, email, phone, and fax) default to selected or unselected.

Housekeeping Jobs to Delete Export and Import Files and Batch XML Data

Housekeeping jobs can now be scheduled to delete files in import and export folders if the files have not been modified in a specified number of days. Also, a new Housekeeping job can be scheduled to delete batch import history records in a specified number of days after completion.

Removed Personal Data from Batch Failure Messages

The Report Detail window available through Batch Import Review no longer displays personal data for customer, user, or transaction XML import files.

Change Delete Inactive Customer Job

The Delete Inactive Customers job now sets the customer ID to null for certain tables and deletes records in other tables, applying the same updates as the deleteCustomer web service.

Removed Links to Export Files from Process Queue

The Job Details window no longer displays a link to deleted export files; instead, the window displays a message indicating that the file is no longer available.

Changes to Default Settings for Configuration Properties

The following changes were made to the default settings for configuration properties:

- Customer Merge – Contact Permissions: The default setting is now ACCEPT_NO, indicating that if any of the records to merge have an unchecked contact permission (email, phone, mail, or fax), that permission for the resulting record will be unchecked.
- Transaction Ids for Customer Tracking: This property controls tender types that can be used as alternate IDs for anonymous customers. There are now no tender types that default as eligible for use as alternate IDs, although types can be added.

Also, the default settings were removed from properties that define the directories to use for exports and imports. These properties are:

- Account Batch Exporter Export Directory
- Award Export Directory
- Batch File Input Directory
- Card Export Directory
- Card Series Export Directory
- Card Series Import Upload Directory
- Customer Batch Exporter Export Directory
- Customer Segment Export Directory
- Directory for Promotion Batch Export Files
- Directory for Segment Batch Export Files
- Location Specific Transform Export Directory
- Loyalty Export Directory
- Promote Transforms Export Directory
- Promotion Export Directory
- Promotion Transforms Export Directory
- Retail Insights Batch Exporter Export Directory
- Tender Activity Report Export Directory

Integration Enhancements

Data Privacy Service

New Data Privacy web service includes messages to retrieve information about a customer's data, and to request that the data be purged.

Change to deleteCustomer

The deleteCustomer message in the Customer web service formerly deactivated the customer record, which was then eligible for deletion through a Housekeeping job. Instead, the web service now removes personally identifiable information immediately from customer-related tables.

New Version of User Service

New version of the User web service includes a new message to retrieve information about a user's data. The version also includes changes to existing request messages to require they specify an authorized security user, and the response messages now include the user's country and the Enabled flag.

Entity Data Controller Role

New user role provides authority to requests for the new Data Privacy web service and new version of the User web service.

Changed Field Names in Loyalty Account Export Sync File

In order to make field names more consistent across loyalty export sync files for integration with a marketing system such as Responsys, the FIRST_USE_DATE and LAST_USE_DATE fields in the Loyalty Account Export Sync file format were renamed to FIRST_USED_DATE and LAST_USED_DATE.

Related Documentation

For more information, see the following documents in the Oracle Retail Customer Engagement 17.0.1 documentation set:

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

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Transfer of Information (TOI) Material (Doc ID 732026.1)

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