

This document highlights the major changes for Release 17.0 of Oracle Retail Customer Engagement.

Overview

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

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

Hardware and Software Requirements

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

Browser Requirements

Connecting to Customer Engagement 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* in the Customer Engagement 17.0 documentation set.

Awards and Points Transfer

Occasionally a loyalty member may want to transfer or gift earned points, or the owner of an awards account may want to transfer or gift awards. In previous versions, this would have required multiple separate transactions. Release 17.0 streams these options into services that are integrated into the account administration console. A customer service representative can now identify the source and the target account on a single screen, and initiate and confirm a points or awards transfer. The transfer is recorded in each of the affected accounts. This event can now trigger an email or SMS notification sent through the Oracle Marketing Cloud's Responsys platform.

Integration with Oracle Marketing Cloud

With the delivery of the points/awards transfer capability through the account administration UI, the platform now initiates confirmation emails automatically to both the account holder of the source and the target account. Users have the ability to configure the specific content that will be sent. The event trigger includes key data to drive message personalization, customer engagement, and brand loyalty.

Integration with Oracle Retail Customer Insights

The integration with Oracle Retail Customer Insights (ORCI) is about turning valuable customer data into actionable strategic insights. The development effort in Release 17.0 publishes loyalty and award activity data 'owned' by ORCE in a format that is readily consumable by ORCI. The ORCI solution also features loyalty dashboards that are specifically designed to work with data from ORCE, and enables users to easily track loyalty program performance against best-practice KPI's.

File Transfer Management

In order to protect important data and to preserve system integrity, access to the underlying environments is strictly controlled. With Release 17.0, investments have been made to more reliably provide users with access to data exported from the system, and to more easily monitor batch files that are being posted into the system. Administrators can now schedule jobs that pull files from an inbound SFTP server. ORCE's existing job management framework provides easy monitoring. In addition, a dashboard is being introduced that summarizes file processing (volume and performance) by data type and aggregates it daily, weekly, monthly, and annually.

In Release 17.0, all exported data is encrypted and stored centrally in the database. As normal, the customer can download the files directly as needed by clicking on the link in the job detail record. If/when transfers are required to support systems integration, the outbound transfer utilities (by type) regularly push files to the designated outbound folders on the SFTP server.

This release also includes the option to schedule an email notification summarizing file processing activity.

Note Security

In Release 17.0, notes management is extended with new features. Users can now apply security features to notes so they can be designated 'public' or 'private'. 'Public' means the note(s) will be accessible to any associate who has access to the customer's record as per customer data security rules. 'Private' means the note will only be accessible to the author and/or the system administrator. Notes can also be deleted. These capabilities are fully integrated into the API layer to better support integrated clienteling or customer service applications.

Issue Loyalty Points for Non-Transactional Activity

Loyalty points can now be awarded to a customer for activities other than transactions. For example, you can now create engagement rules to award points to a customer for watching a video or participating in social media. Marketing engagement rules can be defined with location and segment as eligibility criteria. A new version of the Loyalty web service API is available to communicate rules to integrating systems.

Rebuild Category Totals

A new scheduled job enables you to rebuild the records in the CST_DEPARTMENT_TOTALS table. Data from the last three years can be rebuilt.

Batch Process Tracking

The UI now provides an administrative user with the ability to review batch process activity. The user can view summaries for each batch process type, broken out into daily, weekly, and monthly totals. The UI also indicates the total number of successful and unsuccessful records processed for each batch type, the number of warnings, and the average processing time for each within the time period.

Technical Enhancements

The technical enhancements described below are included in this release.

Currency Conversion for Customer Period Totals

In an effort to more fully support internationalization requirements, the retrieveCustomer method has been extended. The requesting system can now include a 'requesting currency code'. When that currency differs from the defined 'base currency', ORCE automatically converts Life-to-Date and Year-to-Date values (i.e. Sales, Returns) into the local currency.

Define Attributes through Web Service

Release 17.0 adds the ability to create attributes through the Attribute web service API. This API now allows systems to create new attribute groups and define the attributes belonging to the group, providing a streamlined approach for managing attributes used in multiple systems.

Delete Segments through Web Service

Added the ability to delete segments through the Segments web service API, providing a streamlined option for segment management.

Define Customer Lookup Parameters

In order to enhance performance of customer lookup requests, Release 17.0 adds new configuration properties to define the minimum lengths of certain search criteria. For example, to prevent inefficient response processing that would yield an excessive number of matching customers, you can require a length of six positions when searching based on email address. The search criteria whose minimum lengths you can define are last name, phone number, postal code, and email address.

Integration Enhancements

Loyalty Activity History Import

Added a new job to import loyalty activity history from an integrating system.

Customer Activity Sync

Added a new job to export customer activity records to a marketing system such as Responsys.

Loyalty Exports

Added new jobs to export loyalty data to a BI/Analytics system such as Retail Insights. Exported data includes loyalty programs, loyalty accounts, loyalty transactions, and loyalty award transactions.

Task Management Enhancements

The getTaskList web service request message now provides the option to limit the page size of the response, controlling the number of tasks returned. A new configuration property defines the default.

Related Documentation

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

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

Supplemental Training on My Oracle Support

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

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