Oracle® Retail Customer Engagement

JET UI User Guide

Release 18.0

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Oracle® Retail Customer Engagement JET UI User Guide, Release 18.0

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Primary Author:

Contributors:

Value-Added Reseller (VAR) Language

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Oracle Retail Customer Engagement, JET UI User Guide, Release 18.0

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
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Preface

This guide describes the Customer Engagement user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This User Guide is for users and administrators of Oracle Retail Customer Engagement. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Oracle Retail Document Template Release 18.0 documentation set:

- *Oracle Retail Customer Engagement User Guide*
- *Oracle Retail Customer Engagement Implementation Guide*
- *Oracle Retail Customer Engagement Release Notes*
- *Oracle Retail Customer Engagement Administration Guide*
- *Oracle Retail Customer Engagement Batch Processing & Web Services Guide*

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 17.0) or a later patch release (for example, 17.0.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

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

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-**02** is an updated version of a document with part number E123456-**01**.

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Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

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

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

```
This is a code sample
    It is used to display examples of code
```

1

Customer Records Overview

Overview

Customer records store basic information about each customer. These records can be associated with a card or an 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.

User Interface

When you first log in to the application, it will display a menu and tool bar that you can use to navigate to other areas of the application. If you have the CustomerHome user role, the Home page will display two panels on the landing page. See Customer Home for more information.

The **menu** icon provides links that correspond to icons on the toolbar, and goes back to the Home page.

The **Tasks** icon displays a Search for a task search box, where you can enter text to search for Task submenu options, along with links to the Home and Customer pages.

> **Note:** This is not the same Task functionality as that in the full classic (prior to JET) version of Customer Engagement and does not let you search for tasks associated with a user.

The **Customer Search** icon displays the Customer Search page. See Customer Search for more information.

The **Classic View** icon returns you to the full classic (prior to JET) version of Customer Engagement.

About this Guide

This guide contains the following information:

- Customer Home
  - Search for a Customer
  - View Customer Information
  - Day Planner
- Customer Search
  - Search
  - Customers Found
- Customer Dashboard

  - Customer Information
  - Attributes
  - Activity
  - Purchase Profile
  - Stratified Segments
  - Programs
  - Offers
  - Segments
  - Notes
- Customer Validation

2
Customer Home

When you log in to the application, if you have been assigned the user role CustomerHome, the Home page will have two panels: one with a list of customers that are assigned to you, along with a customer search component; and a Day Planner panel.

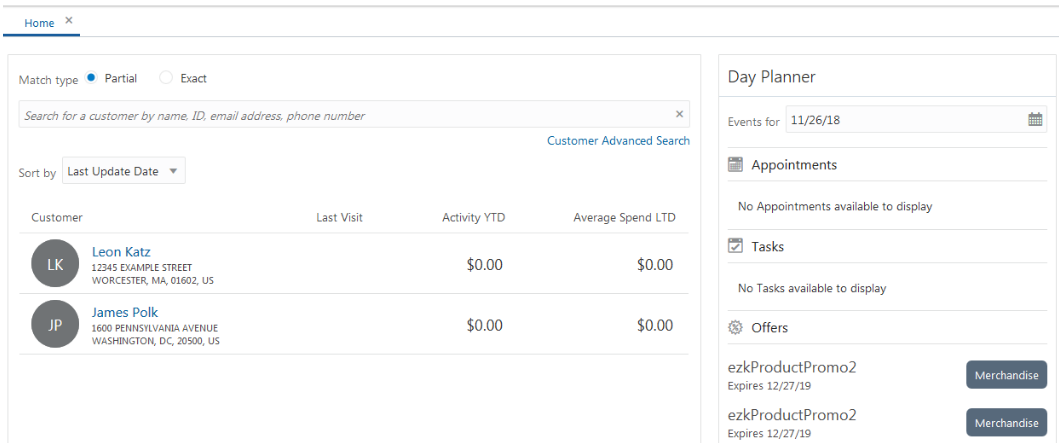


Figure 2-1: Home page for CustomerHome role

Search for a Customer

You can search for additional customers by entering the customer name, customer id, alternate key, email address, or phone number in the Search bar. Select **Partial**, if you want to get results that match part of what you enter, or select **Exact** if you only want results that are an exact match.

You can click the Customer Advanced Search link to do an advanced search. See Customer Search for more information.

View Customer Information

You can click on a customer name or image icon in the assigned customers list to view more information about them in the Customer Dashboard.

Day Planner

The Day Planner shows a list of appointments and tasks assigned to the associate as well as offers for a given day.

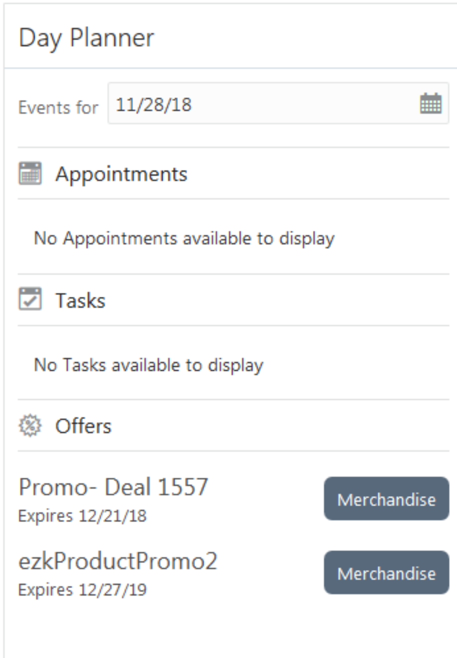


Figure 2-2: Day Planner

Click the **calendar** icon  in the Events for field to select a different date.

The following information is displayed for the selected date:

- **Appointments** – Shows the appointments for the selected date. No expired appointments are shown. The maximum number of appointments displayed is 25. If there are no appointments, the message “No appointments available to display” is shown.
- **Tasks** – Shows the tasks assigned on the selected date. No expired tasks are shown. The maximum number of tasks displayed is 25. If there are no tasks, the message “No tasks available to display” is shown.
- **Offers** – Shows all active offers based on the selected date. The offers are shown for the default location of the associate. If there is no default location identified, all offers for the chain are shown. No expired offers are shown. The maximum number of offers displayed is 25. If there are no offers, the message “No offers available to display” is shown.

3
Customer Search

Use the Customer Search page to find an existing customer to work with.

How to display this page:

- Select the **Customer Search** icon ()
- Search – You can search for customers using a number of criteria such as Name, Address, and Customer ID.
- Customers Found – Shows a list of customers retrieved based on the search criteria.

Search

To search for a customer, enter any combination of the following search criteria and select Search. Optionally, select Reset to clear the entered search criteria.

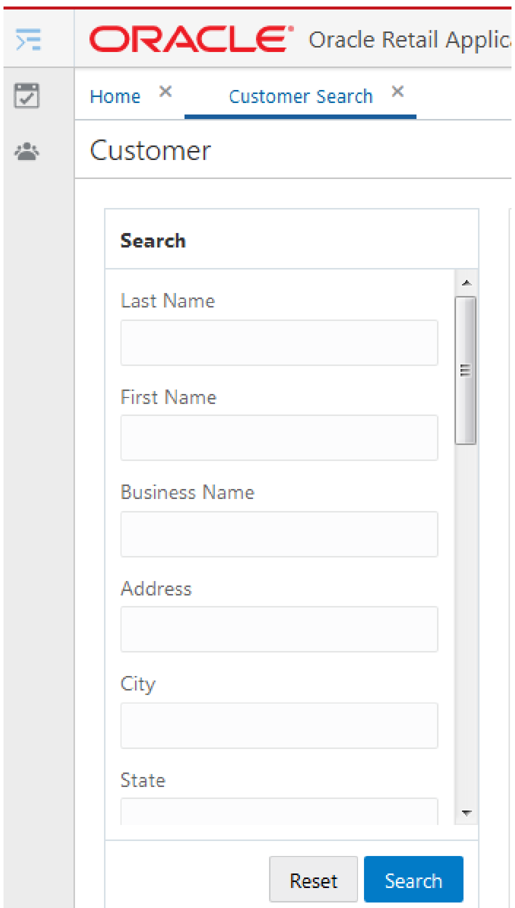


Figure 3-1: Customer Search

Rules for Searching

- Matching: Unless otherwise indicated, the results are restricted to customer records that begin with your entry or match it exactly. For example, if you enter a postal code of 2050, the results include customers whose postal codes are 20501 or 20502.
- Case: Searching is case-insensitive. In other words, an entry of ROOSEVELT or roosevelt will match with a customer last name of Roosevelt.
- Searches for primary records only: In cases where the customer can have a primary record and additional records, such as address, email or phone number, the customer is included in search results only if the primary record matches. For example, if the postal code for the customer's primary address is 01602, but the customer also has an additional address in postal code 01609, the customer is not included in the search results if you search on postal code 01609.

> **Note**: Be as specific as possible when entering search information. The more specific the information, the fewer customer records will be returned

Search Criteria

- **Last Name** - Customer last name.
- **First Name** - Customer first name.
- **Business Name** - Name of the customer's business.
- Address - Address line for the customer. Searches address line 1 in the customer's primary 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.
- **Email Address** - Customer's primary email address.
- **Phone Number** - Customer's primary telephone number.
- **Second First Name** - Customer's second first name.

> **Note:** This field appears only if the system is configured to display additional customer names. See the Implementation Guide for more information.

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

> **Note:** This field appears only if the system is configured to display additional customer names. See the Implementation Guide for more information.

- **Customer ID** - A unique identifier assigned by Customer Engagement. Searching on customer ID requires an exact match.
- **Alternate Key** - Customer Alternate Key. A unique identifier assigned to identify the customer in an integrating system. Searching on Alternate Key requires an exact match.
- **Card Number** - Card Number associated with the customer. Searching on card number requires an exact match.
- **Card Serial Number** - Serial Number of the card associated with the customer. Searching on card serial number requires an exact match.

- **Associate ID** - ID of an Associate assigned to the customer. Searching on associate ID requires an exact match.
- **Segment ID** - ID for a customer segment. Segments are listed numerically by Segment ID. Optionally, select an existing segment from the list to restrict results to customers in the segment, or leave this field set to All.
- **Franchisee** - Name of the Franchisee. Franchisees are listed alphanumerically by franchisee name. Optionally, select a franchisee from the list to restrict results to customers associated with the franchisee, or leave this field set to All.

  Note: This field appears only if the Franchisee Support is enabled. See the Implementation Guide for more information.

Customers Found

The customer records matching the search criteria are displayed under Customers Found.

If more than 25 customer records match the search criteria, the first 25 records are displayed. Select Show More... at the bottom of the page to display more customer records.

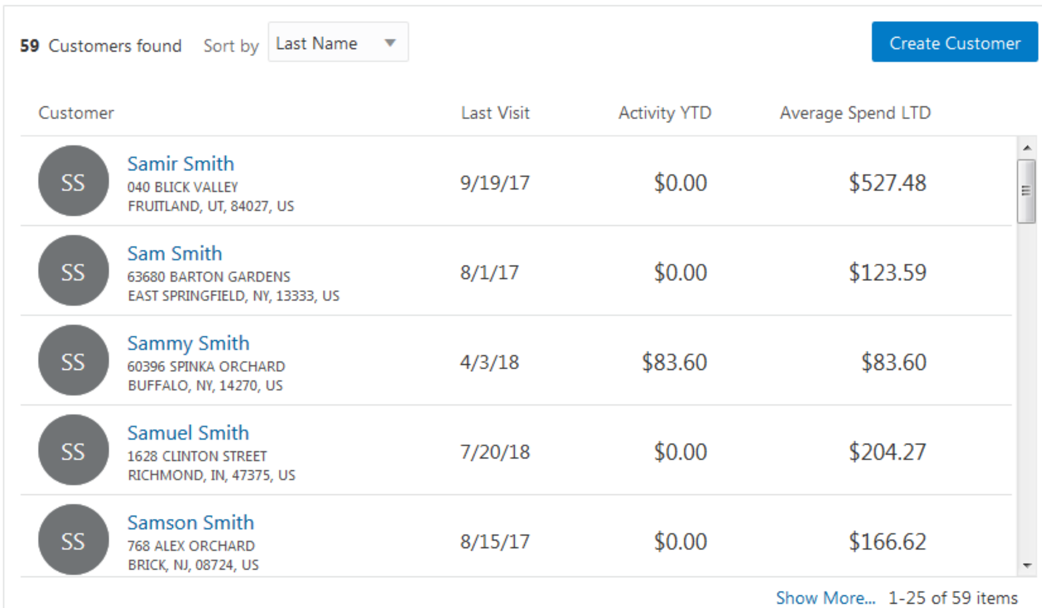


Figure 3-2: Customers Found List

- Customer image or initials - Displays:
  - The image of the customer, if it has been identified. Otherwise,
  - The customer's initial(s), if the customer's first or last name, or both, are known. Otherwise,
  - A customer icon () if the customer record has no first or last name (for example, a business).
  - The customer image or initials provides a link to the Customer Dashboard.
  - Customer name - The customer first and last name, if any.
  - The customer name provides a link to the Customer Dashboard. This option is not available if the customer record has no first or last name (for example, a business).
  - Customer address – Values include, Address 1, Address 2, City, State/Province, Postal Code, and country, if they exist. If the customer does not have a primary address, the message "No Address Available" is displayed.
  - Last Visit - The date of the customer's last purchase.
  - Activity YTD - The total amount of the customer's purchases year-to-date, displayed in the base system currency.
  - Average Spend LTD - The average amount of the customer's purchases life-to-date (the total amount of the customer's purchases life-to-date divided by the number of purchases). Displayed in the base system currency.

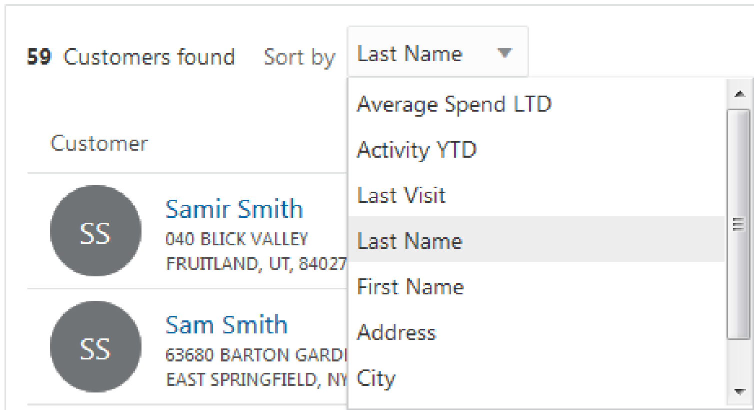


Figure 3-3: Sort-by Options

Sorting Customers

You can use the Sort by drop-down list to sort the list of Customers found by the following options:

- **Average Spend LTD** - Select this option to list customers in descending order by average spend life-to-date (the total amount of the customer's purchases life-to-date divided by the number of purchases).
- **Activity YTD** - The total amount of the customer's purchases year-to-date, displayed in the base system currency.
- **Last Visit** - Select this option to list customers in descending order by the date of last visit (purchase).
- **Last Name** [default] - Leave this option selected to list customers alphabetically by last name.
- **First Name** - Select this option to list customers alphabetically by first name.
- **Address** - Select this option to list customers alphanumerically by street address; for example, 1234 Main Street is listed before 1235 Main Street.
- **City** - Select this option to list customers alphabetically by city name. Customers in the same city are listed alphabetically by last name.
- **State** - Select this option to list customers alphabetically by state or province. Customers in the same state or province are listed alphabetically by last name.

Displaying a Customer in the Customer Dashboard

You can click on a customer name or image icon in the Customers found list to view more information about them in the Customer Dashboard.

Creating a New Customer

Click the **Create Customer** button to create a new customer. This displays a blank Customer Details page for the new customer. See Customer Information for details about the information that can be entered in this page.

Customer Dashboard

Use the Customer Dashboard to look up the information available for a customer and to edit customer information.

The Customer Dashboard is displayed when you look up a customer. See Customer Search. You can also link from the customer name or image icon in the Customer List on the Home page.

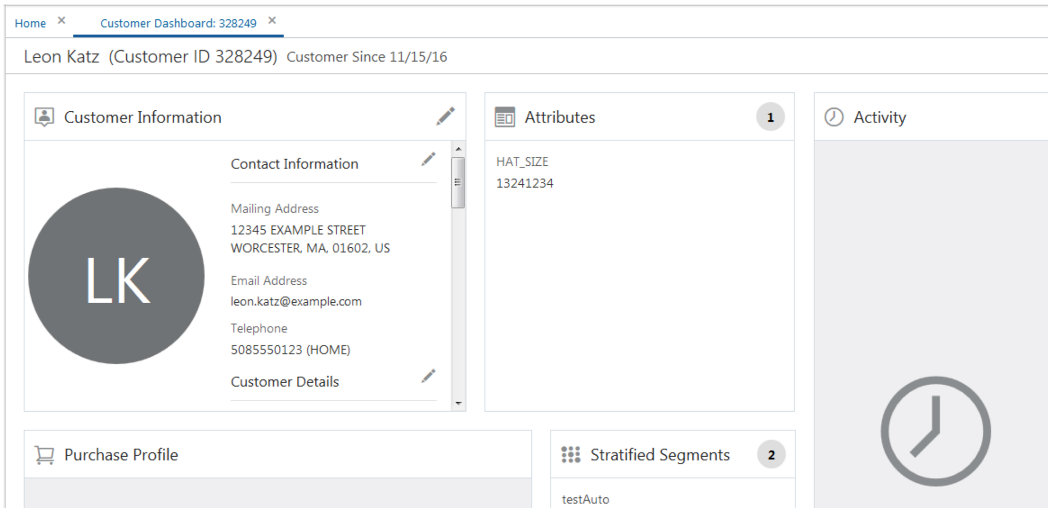


Figure 4-1: Customer Dashboard

Information on the Customer Dashboard is divided into these sections:

- **Customer Information** – Basic information about the customer, such as mailing addresses, email addresses and phone numbers. See Customer Information.
- **Attributes** – Information that helps to characterize the customer, such as birth month and marital status. See Attributes.
- **Activity** – Shows current and upcoming customer tasks. See Activity.
- **Purchase Profile** – Shows purchase pattern of the customer by revenue center over a year. See Purchase Profile.
- **Stratified Segments** – Shows the stratified segments in which the customer is grouped. See Stratified Segments.
- **Programs** – Includes information for each program where the customer has an account. See Programs.
- **Offers** – Shows current offers for the customer. See Offers.
- **Segments** – Segments define groups of customers. This section shows the segments to which the customer belongs. See Segments.
- **Notes** – Provides information about all of the notes written about the Customer. See Notes.

Customer Information

The Customer Information area of the Customer Dashboard includes contact information and other details about the customer.

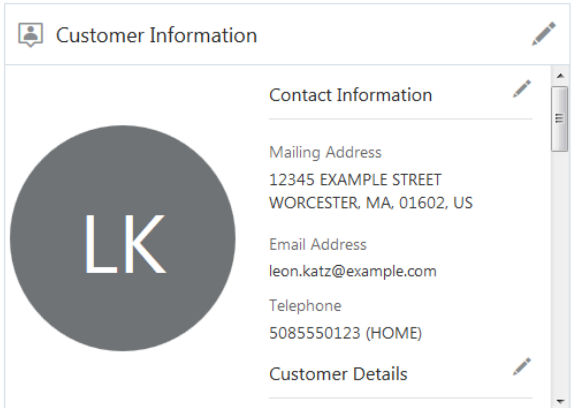


Figure 4-2: Customer Information

Use the scroll bar or up and down arrow keys to move through the information.

Edit Customer Details

To edit Customer Details, click the **Edit** icon at the top of the panel next to Customer Information, or next to Customer Details. This opens an editable Customer Details panel.

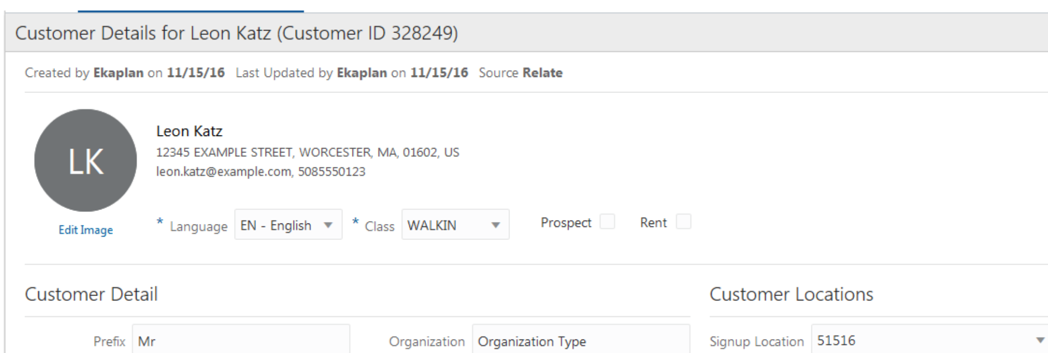


Figure 4-3: Customer Details Editing

A customer image, if provided, is displayed in the top left of this panel.

To edit the customer image:

1. Under the customer image, click **Edit Image**. This displays a dialog for uploading an image.

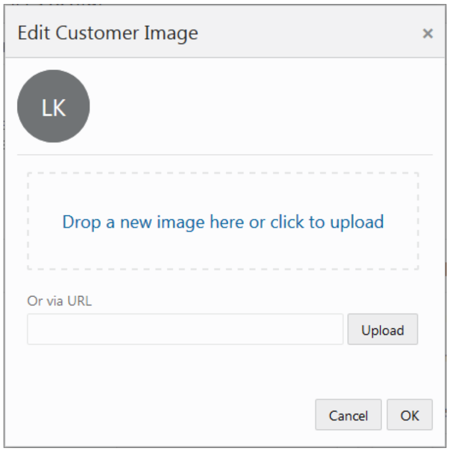


Figure 4-4: Edit Customer Image

2. Select an image and drag it into the top box. Alternatively, you can enter a URL for the image file in the Or via URL field, and click **Upload**.
3. When you have selected the new image file, click **OK**.

For all other items, enter the information in the fields that need updating and click **OK**.

Customer Detail information includes the following:

Customer Details:

- **Language** – The customer's preferred language (required).
- **Class** – The class to which the customer belongs (required).
- **Prospect** – Indicates whether the customer is a prospect.
- **Rent** – Indicates whether the customer name can be rented to other companies for prospecting efforts.
- **Prefix** – Prefix to the customer name.
- **First Name** – First name for the customer.
- **Second First Name** – A second first name for the customer, if provided.
- **Middle Name** – Middle name or middle initial for the customer.
- **Last Name** – Last name for the customer.
- **Second Last Name** – A second last name for the customer, if provided.
- **Suffix** – Suffix to the customer name.
- **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 of the customer.
- **Gender** – Customer gender.
- **Education Level** – Highest level of education completed by the customer.
- **Marital Status** – Current marital status of the customer.
- **Anniversary** – Customer anniversary date.
- **Ethnicity** – Customer ethnicity.
- **Annual Income** – Customer's annual income.
- **Net Worth** – Net worth of the customer.
- **Signup Location** – Location where the customer signed up.
- **Home Location** – Home location for the customer.

- **Contact Permissions** – The methods by which the customer has given permission to be contacted. Check the box next to each allowed method.
- **Card Detail** – Details on card associated with the customer.

Edit Customer Contact Information

To edit the customer's contact information, click the **Edit** icon next to Contact Information. This opens an editable Contact Information panel.

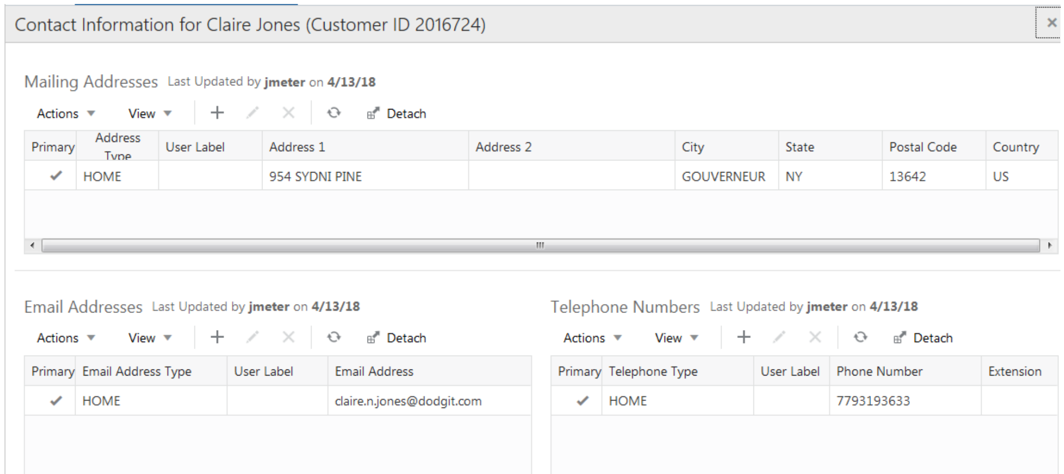


Figure 4-5: Edit Customer Contact Information

Customer Contact information includes the following:

- **Mailing Addresses** – All mailing addresses of the customer.
- **Email Addresses** – All email addresses of the customer.
- **Telephone Numbers** – All telephone numbers of the customer.

Add, Edit, or Delete a Mailing Address:

To create a new mailing address:

1. In the Contact Information editing panel under Mailing Addresses, choose **Create Address** from the Actions menu, or click the **Add** icon. This opens a Create Address dialog.

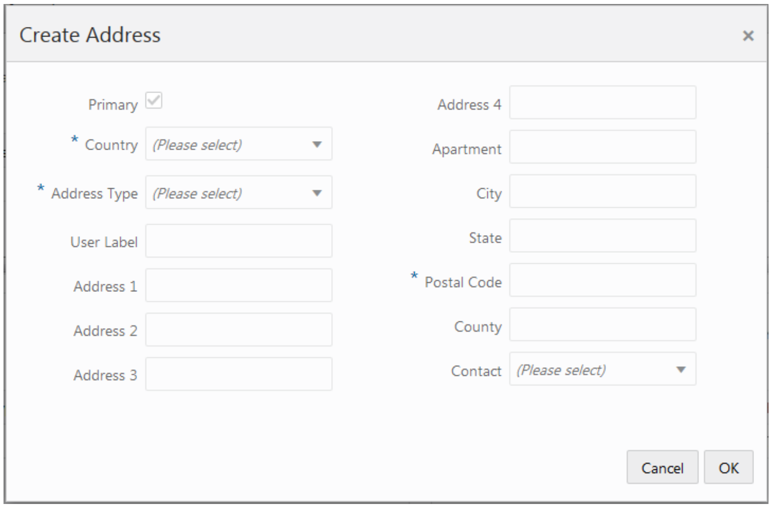


Figure 4-6: Create Address Dialog

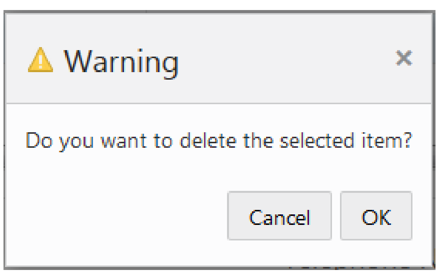
2. Enter the information for the new address (see field descriptions below) and click **OK**. The new address is displayed at the top of the Mailing Address list, because the Primary flag is automatically defaulted when adding a new mailing address.

   The Primary field for any address that was previously the primary address is de-selected.

To delete a mailing address:

3. In the Contact Information editing panel under Mailing Addresses, select the address you want to delete.

4. Choose **Delete Address** from the Actions menu, or click the **Delete** icon. This displays a Warning message:



5. In the Warning message, click **OK**. The address is deleted from the Mailing Addresses list.

To edit a mailing address:

6. In the Contact Information editing panel under Mailing Addresses, choose **Edit Address** from the Actions menu, or click the **Edit** icon. This opens an Edit Address dialog:

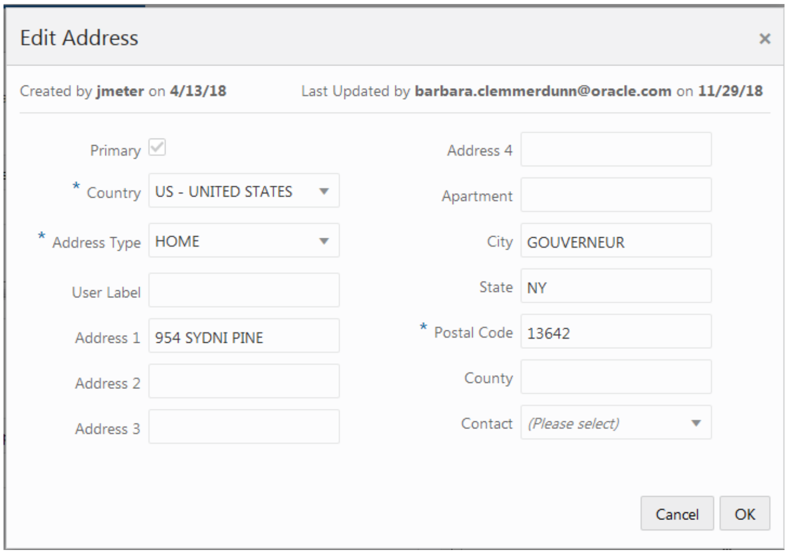


Figure 4-7: Edit Address Dialog

7. Edit the information for the address (see field descriptions below) and click **OK**. The edited information is displayed in the Mailing Addresses list.

   If the Primary checkbox for the address that you are editing was selected, the Primary checkbox will be disabled in the Edit Address dialog. If the Primary checkbox for the address that you are editing was not selected, the Primary checkbox will be enabled in the Edit Address dialog. To set an address as the new Primary address, select the Primary check box when editing.

The Create and Edit Mailing Address dialogs display the following information:

- **Primary –** Indicates whether this is the primary address for the customer.
- **Country –** The country for the customer address. Select a country from the drop-down list (required).
- **Address Type –** Indicates the type of address, such as Home or Business. Select a type from the drop-down list (required).
- **User Label** – User label for the address.
- **Address 1-4 –** The street number in the address. You can enter up to four addresses, for example, suite or office number.
- **Apartment –** The apartment number, if applicable.
- **City –** The city for the customer address.
- **State –** The state for the customer address.
- **Postal Code –** The postal code for the customer address (required).
- **County –** The county for the customer address.
- **Contact –** The contact rule for the address. Select a contact preference from the drop-down list.

Add, Edit, or Delete an Email Address:

To create a new email address:

8. In the Contact Information editing panel under Email Addresses, choose **Create Email Address** from the Actions menu, or click the **Add** + icon. This displays a Create Email Address dialog:

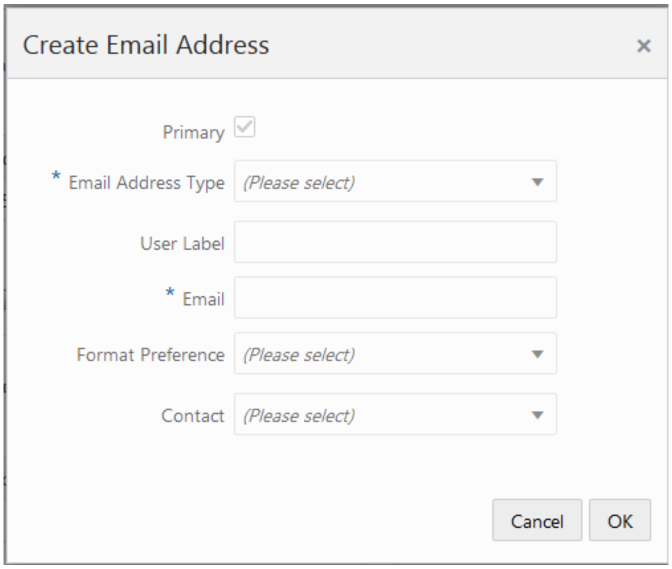


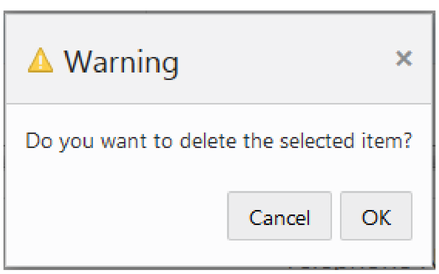
Figure 4-8: Create Email Address Dialog

9. Enter the information for the new email address (see field descriptions below) and click **OK**. The Primary flag is automatically defaulted when adding a new email address, so the new email is displayed at the top of the Email Addresses list.

   The Primary field for any email that was previously the primary email is de-selected.

To delete an Email address:

10. In the Contact Information editing panel under Email Addresses, select the email you want to delete.
11. Choose **Delete Email Address** from the Actions menu, or click the **Delete** icon. This displays a Warning message:



12. In the Warning message, click **OK**. The email is deleted from the Email Addresses list.

To edit an Email address:

13. In the Contact Information editing panel under Email Addresses, select the email address you want to edit, and choose **Edit Email Address** from the Actions menu, or click the **Edit** icon. This opens an Edit Email dialog.

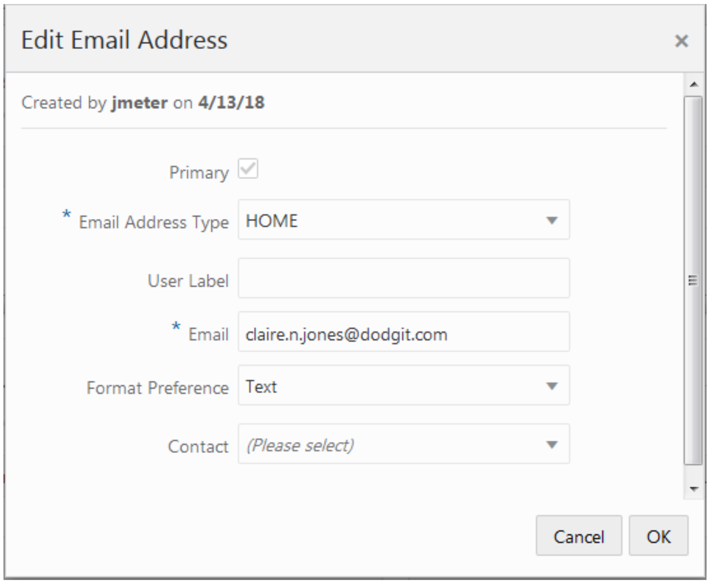


Figure 4-9: Edit Email Address Dialog

14. Edit the information for the email address (see field descriptions below) and click **OK**. The edited information is displayed in the Email Addresses list.

    If the Primary checkbox is selected for the email address being edited, the Primary checkbox will be disabled in the Edit Email Address dialog. If the Primary checkbox is not selected for the email address being edited, the Primary checkbox will be enabled in the Edit Email Address dialog. To set an email address as the new primary email address, select the Primary check box when editing.

The Create and Edit Email Address dialogs display the following information:

- **Primary –** Indicates whether this is the primary email address for the customer.
- **Email Address Type** – The type of email address, for example, Home or Business. Select a type from the drop-down list (required).
- **User Label** – User label for the email address (required).
- **Email** – The email address (required).
- **Format Preference** – The preferred file format for receiving email messages. Select a format from the drop-down list.
- **Contact –** The contact rule for the email address. Select a contact preference from the drop-down list.

Add, Edit, or Delete a Telephone Number:

To create a new telephone number:

15. In the Contact Information editing panel under Telephone Numbers, choose **Create Telephone** from the Actions menu, or click the **Add** + icon. This opens a Create Telephone dialog.

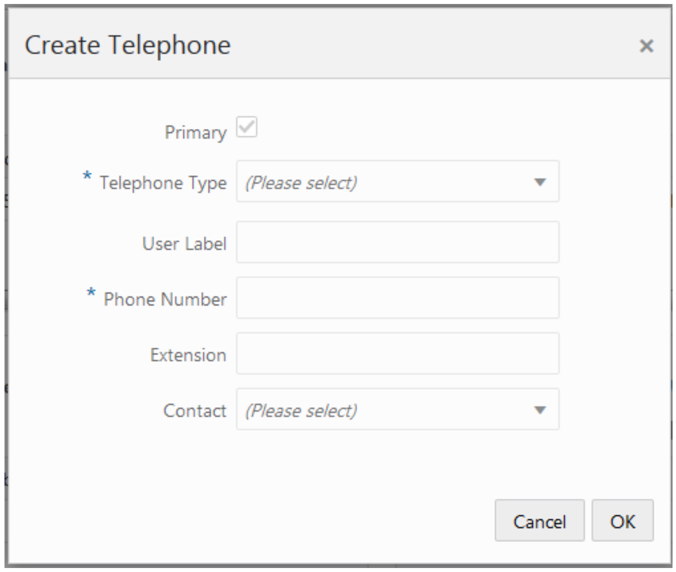


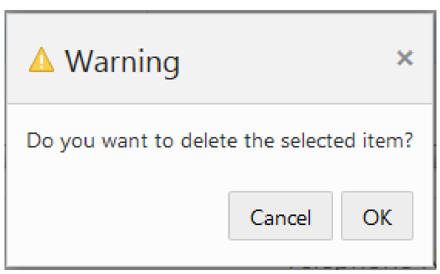
Figure 4-10: Create Telephone Dialog

16. Enter the information for the new number (see field descriptions below) and click **OK**. The Primary flag is automatically defaulted when adding a new telephone number, so the new number is displayed at the top of the Telephone Numbers list.

    The Primary field for any number that was previously the primary number is de-selected.

To delete a telephone number:

17. In the Contact Information editing panel under Telephone Numbers, select the number you want to delete.
18. Choose **Delete Telephone** from the Actions menu, or click the **Delete**  icon. This displays a Warning message.



19. In the Warning message, click **OK**. The number is deleted from the Telephone Numbers list.

To edit a telephone number:

20. In the Contact Information editing panel under Telephone Number, select the telephone number you want to edit, and choose **Edit Telephone** from the Actions menu, or click the **Edit**  icon. This opens an Edit Telephone dialog.

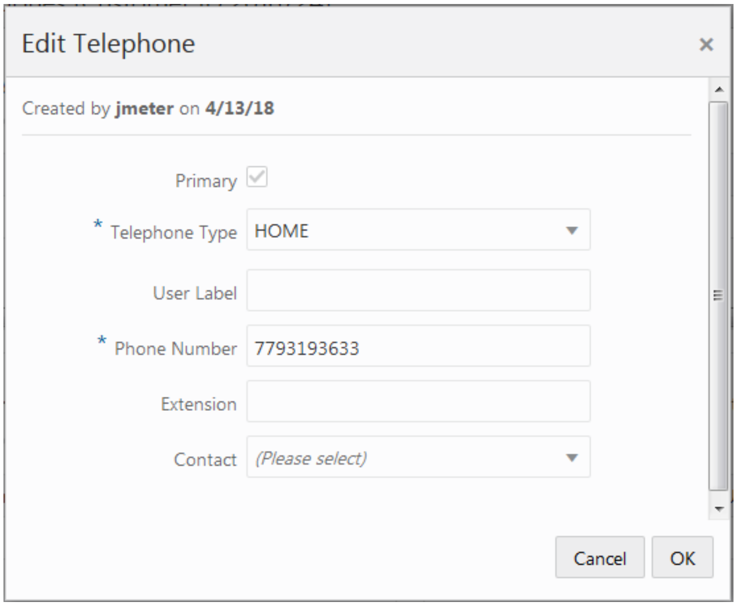


Figure 4-11: Edit Telephone Dialog

21. Edit the information for the number (see field descriptions below) and click **OK**. The edited information is displayed in the Telephone Numbers list.

    If the Primary checkbox is selected for the telephone number being edited, the Primary checkbox will be disabled in the Edit Telephone dialog. If the Primary checkbox is not selected for the telephone number being edited, the Primary checkbox will be enabled in the Edit Telephone dialog. To set a telephone number as the new Primary telephone number, select the Primary check box when editing.

    The Create and Edit Telephone dialogs display the following information:

- **Primary –** Indicates whether this is the primary telephone number for the customer.
- **Telephone Type** – The type of telephone number, for example, Home or Business. Select a type from the drop-down list (required).
- **User Label** – User label for the telephone number.
- **Phone Number** – The telephone number, including area code (required).
- **Extension** – The telephone number extension, if applicable.
- **Contact –** The contact rule for the telephone number. Select a contact preference from the drop-down list.

Attributes

The Attributes panel of the Customer Dashboard displays all the attributes and attribute values associated with the customer:

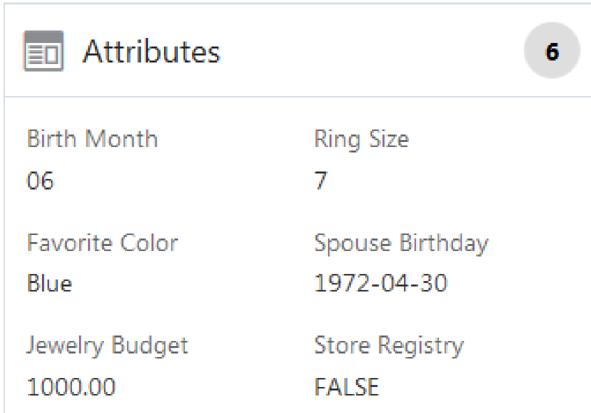
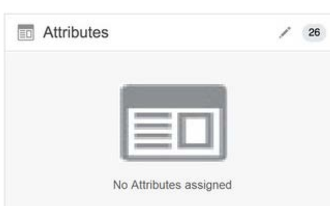


Figure 4-12: Customer Attributes

- A badge with the total number of attributes assigned to the customer is displayed on the right side of the title bar, as in figure 4-12, above.
- 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.
- The name of the attribute appears above the attribute value.
- If attributes are assigned to a group, those attributes are sorted by group, and the group name is displayed above the attributes.
- Scroll bars are available if the number of attributes do not fit in the display area of the panel.
- If there are no attributes assigned to the customer, the following image is displayed:



Activity

The Activity panel of the Customer Dashboard provides quick access to transactions and other activities pertaining to a customer.

- This panel displays current and future tasks, and after those, the past 25 activities, which include tasks and retail transactions.
- The user can view the tasks associated with the customer only if they have the appropriate user roles for task access.

- The activity stream is sorted by the most recent first.
- Scroll bars are available if the number of activities do not fit in the display area of the panel.
- If there are no activities to show for the customer, an image with “No Activity available to display” is shown.

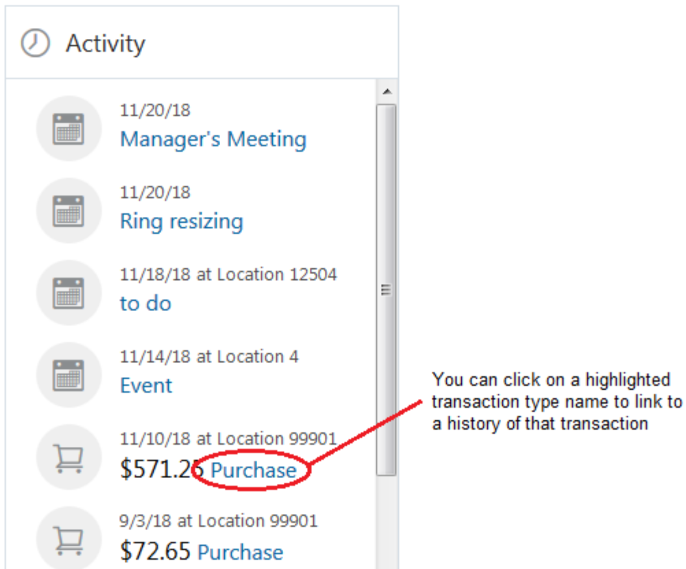


Figure 4-13: Customer Activity

The Activity panel can display the following information, depending on the type of activity:

- The date of the activity.
- The name of the activity.
- The location where the activity occurred, if available.
- The total amount of a transaction, such as a purchase.

Item Purchase History

In the Activity panel above, if the activity is a transaction such as a purchase, return, or void, you can link to the item purchase history details by clicking on the highlighted transaction type name.

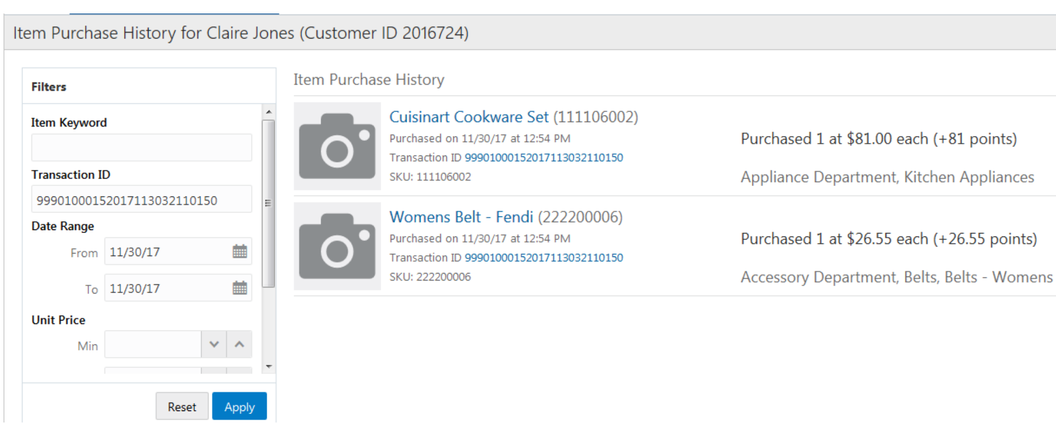


Figure 4-14: Item Purchase History Details

> **Note:** You can also link to the Item Purchase History from the Purchase Profile by clicking on a colored area in the bar chart, or by clicking the View All Purchases link. See Purchase Profile.

Filters

You can use the fields in the Filters panel to search for specific items by the following criteria:

- **Item Keyword** – Enter a keyword in the item description to filter for items having that keyword.
- **Transaction ID** – Enter an exact Transaction ID to filter for that transaction.
- **Date Range** – Specify a date range using the calendars to search for items in that date range.
- **Unit Price** – Use the up and down arrows to specify a minimum and maximum unit price to filter for items in that price range.
- **Department** – The store department where the item was purchased. Select a department from the pop-up list to filter on items from that department.

> **Note:** This is a client-specific hierarchy field and the name (for example, Department) will depend on the client system configuration.

Reset – Click **Reset** to clear all filters. This will display all of the items purchased by the customer.

Apply – Click **Apply** to display items filtered by the specified criteria.

When there are more fields than can fit in the filter box, a scroll bar is provided to navigate to the hidden items.

The following information is displayed for each item in the list, if available:

- Item name and number.
- Purchase date and time.
- Transaction ID.
- SKU.
- Quantity – the number of items purchased or returned.
- Price – the price paid for the item.
- Points –the loyalty points earned or reduced for the item purchased or returned.
- Item Hierarchies for the item.

Item Details

When you click on a specific item in the Item Purchase History panel, the Item Detail popup opens:

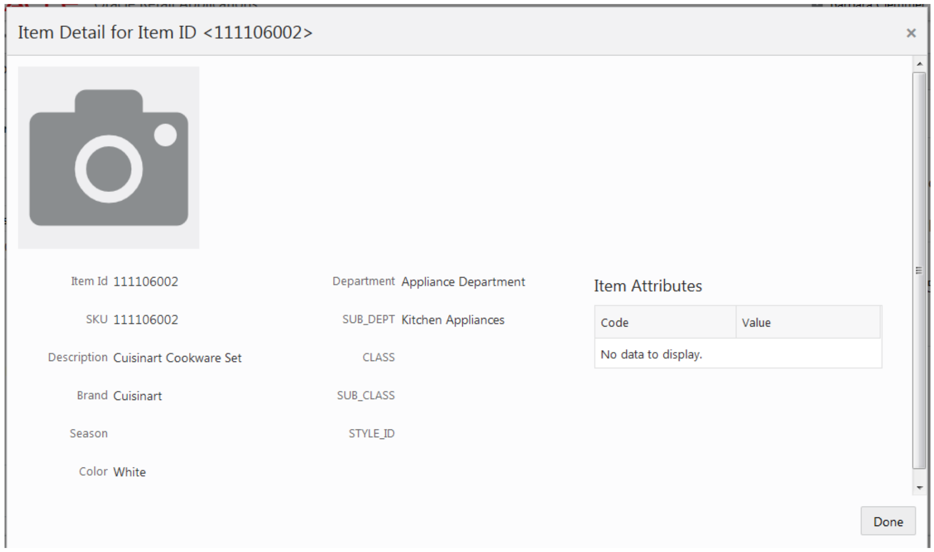


Figure 4 -15: Item Detail Popup

These details for the item are displayed, if available:

- Item ID
- SKU
- Description
- Brand
- Season
- Color
- Hierarchy 1-5 - These vary according to the way the customer is configured, for example, Department, SUB_DEPT, CLASS, SUB_CLASS, STYLE_ID. Only configured levels are displayed.
- Item Attributes:
  - Code
  - Value
  - If more attributes are available than can fit in the Item Attributes box, scroll bars are provided for navigation to hidden information.

Click **Done** when you are finished viewing the details to close the Item Detail popup.

Transaction Details

When clicking on a specific transaction ID in the Item Purchase History panel (See Figure 4-14), a Purchase Details popup is displayed for that transaction ID.

- The popup has three tabs, shown in figures 4-16, 4-17, and 4-18.
- The information is read-only.
- It displays both purchases and returns, in all three tabs, based on the selected transaction.
- All currency fields are populated based on the system base currency.
- If there is more information than can fit in the tab, scroll bars are provided for navigation to hidden information.

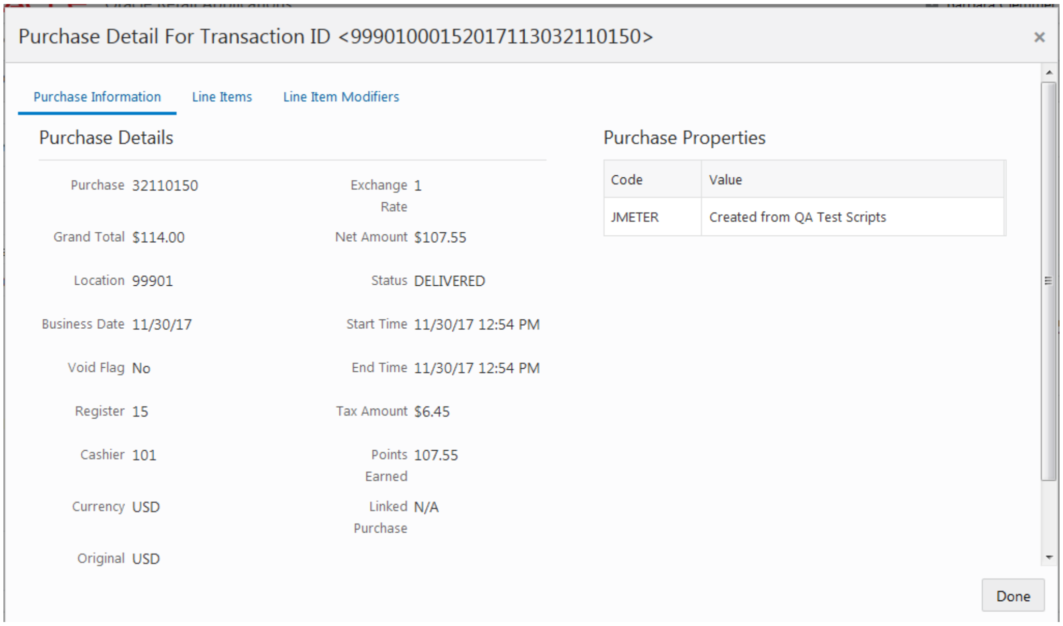


Figure 4-16: Purchase Detail Popup – Purchase Information

The first panel, Purchase Information, is displayed by default when you click on the transaction ID, or when you click the Purchase Information tab. It displays the following details about the transaction, if available:

- Purchase
- Grand Total
- Location
- Business Date
- Void Flag
- Register
- Cashier
- Currency
- Original Currency
- Exchange Rate
- Net Amount
- Status
- Start Time
- End Time
- Tax Amount
- Points Earned
- Linked Purchase
- Code
- Value

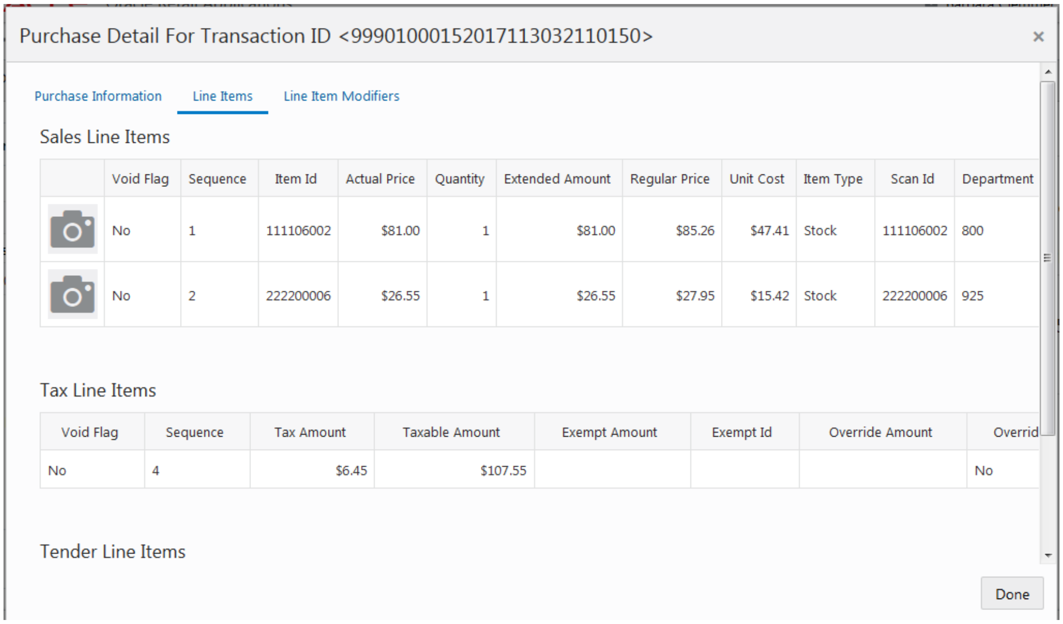


Figure 4-17: Purchase Detail Popup – Line Items

Line items are displayed when you click the Line Items tab. The following information is displayed, if available:

- Sales Line Items
  - Void Flag
  - Sequence
  - Item ID
  - Actual Price
  - Quantity
  - Extended Amount
  - Regular Price
  - Unit Cost
  - Item Type
  - Scan ID
  - Department
  - Hierarchy 1-5 - These vary according to the way the customer is configured, for example, Department, SUB_DEPT, CLASS, SUB_CLASS, STYLE_ID. Only configured levels are displayed.
  - Points Earned
- Tax Line Items
  - Void Flag
  - Sequence
  - Tax Amount
  - Taxable Amount
  - Exempt Amount
  - Exempt ID
  - Override Amount

  – Override Flag
  – Override Percentage
  – Override Reason
- Tender Line Items
  – Void Flag
  – Sequence
  – Tender ID
  – Tender Amount
  – Authorization Code
  – Account Number
  – Activity
  – Adjudication Code
  – Expiration Date
  – Face Value
  – Issue Date
  – Issue Type
  – Serial Number
  – Remaining Amount

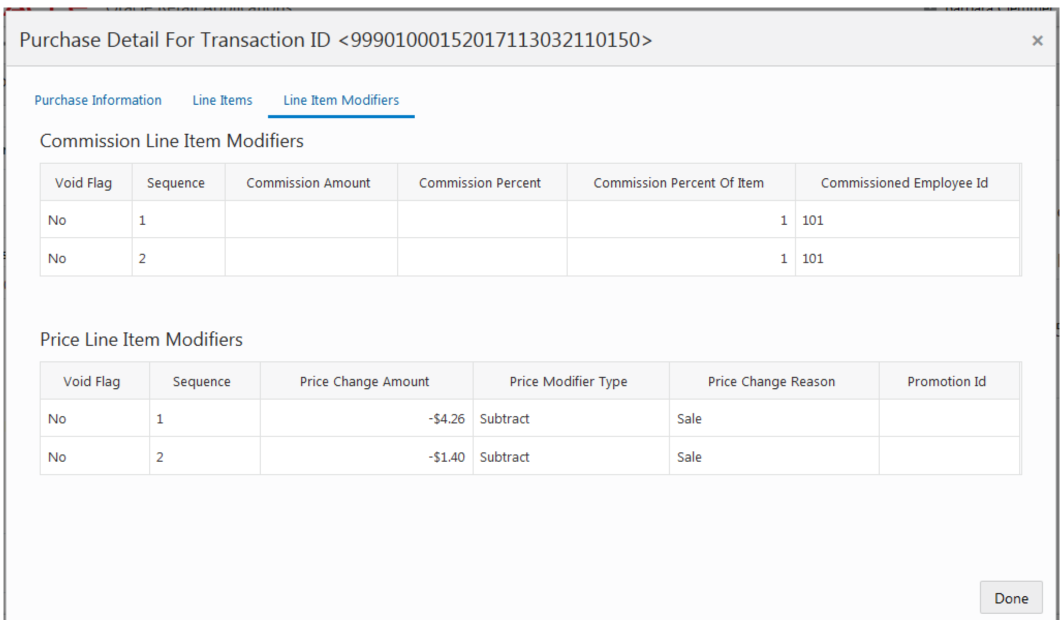


Figure 4-18: Purchase Detail Popup – Line Item Modifiers

When clicking the Line Item Modifiers tab, the line item modifiers are displayed. The following information is displayed, if available:

- Commission Line Item Modifiers:
  – Void Flag
  – Sequence
  – Commission Amount
  – Commission Percent
  – Commission Percent of Item

  - Commissioned Employee ID
- Price Line Item Modifiers:
  - Void Flag
  - Sequence
  - Price Change Amount
  - Price Modifier Type
  - Price Change Reason
  - Promotion ID

Click **Done** when you are finished viewing the transaction details to close the popup.

Purchase Profile

The Purchase Profile panel shows the purchase pattern of the customer. Each bar in the graph represents a year. The colored bands correspond to the revenue department in which the customer purchased products during that year, measured by the amount of spending.

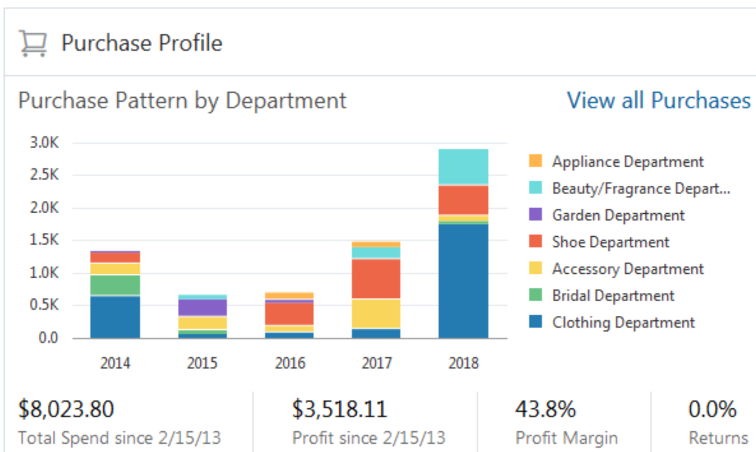
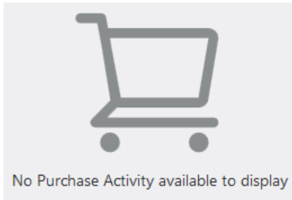


Figure 4-18: Customer Purchase Profile

- Other revenue metrics include:
  - **Total Spending** – Shows how much the customer has spent since their first purchase to date.
  - **Profit Since**– Shows the total profit the store or chain has made since the customer's first purchase to date.
  - **Profit Margin** - Shows the percentage of Profit to Total Spending.
  - **Returns** – Shows the percentage of the amount of Returns to the amount of Total Spending.
- If there are no Purchase Profiles to show for the customer, a "No Purchase Activity available to display" image is displayed:



Viewing Purchase Pattern Details

Hover over a colored area in a graph to see detail information in a tooltip. This information includes:

- **Category** – The category of the purchase, such as Clothing Department.
- **Category Spend** – How much the customer spent on items in this category.
- **Classes** – The name of the classes (or client-specific hierarchy level) within the selected category.

Viewing Purchase History

Click a colored area in a bar chart to go the Item Purchase History for all the items represented in that area.

You can also click on the **View All Purchases** link to go to the Item Purchase History for all items in the Purchase Profile.

See Item Purchase History for more information.

Stratified Segments

Stratified Segments define groups of Customers. The Customers within a Stratified Segment are divided into levels within the Segment. The stratified segments to which the customer belongs are shown in the Stratified Segments panel of the Customer Dashboard.

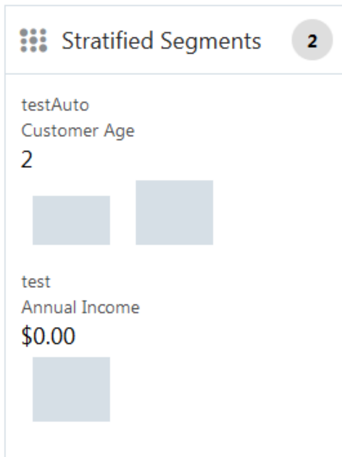
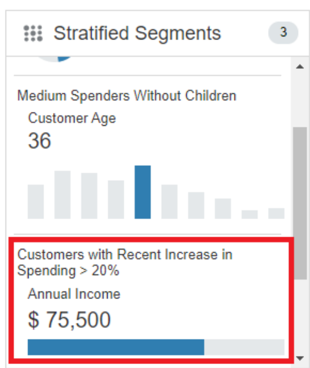


Figure 4-19: Stratified Segments

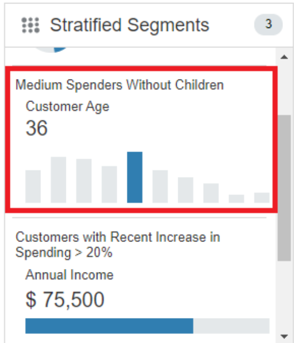
- Stratified segments classified as public are shown. If a stratified segment is classified as private, it will only be shown to the associate who created the stratified segment.
- Three types of graphs are used to represent statistics:
  - Status Meter Gauge – Horizontal, uses horizontal orientation to indicate thresholds at specific values:

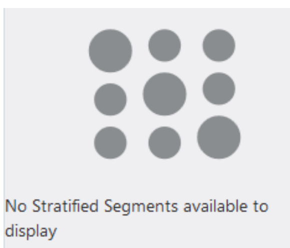
  - Status Meter Gauge – Circular, uses circular orientation to indicate thresholds at specific values:

   – Spark Chart – Bar, used to view trends over time and generally paired with additional context in a table:

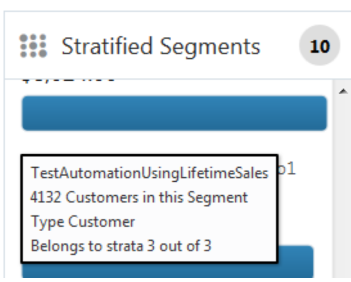


- A badge with the total number of stratified segments to which the customer belongs is displayed on the right side of the title bar, as in figure 4-16, above.
- Scroll bars are available if the number of stratified segments do not fit in the display area of the panel.
- If there are no stratified segments assigned to the customer, the following image is displayed:



Viewing Stratified Segment Details

If you hover over a segment name in the Stratified Segments panel a tooltip is displayed:



The following information is provided:

- Segment Description.
- Customer Count – Total number of customers in this segment.
- Strata Type and Based on Value:
   – Strata Type values (Customer, Loyalty, Transaction).
   – Based on Value (Header, Detail, Customer, Loyalty Summary, Loyalty Detail).
   – Type = <strata type> based on <based on value>.
- Customer Strata membership - The strata the customer falls into.

Programs

The Programs panel of the Customer Dashboard includes the following information for each program where the customer has an account. Programs can include loyalty, awards, and other programs that can be used for marketing campaigns:

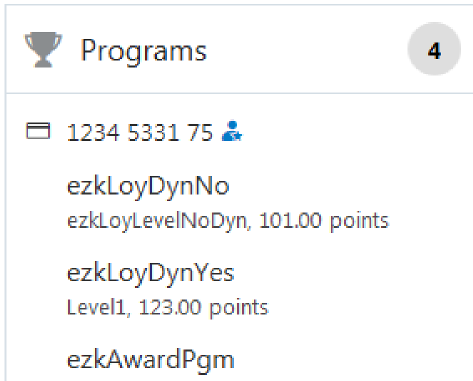
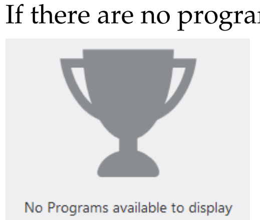


Figure 4-20: Programs

- Only active programs and accounts (cards) are displayed.
- If there are multiple cards associated with the customer, the programs will be grouped together by card, and the card number is displayed above the programs.
- The following fields are displayed for a card:
  - Card number.
  - Card icon – displayed to the left of the card number to indicate that it is a card number.
  - Primary card holder icon – displayed to the right of the card number if the customer is the primary card holder.
- The following fields are displayed for each program:
  - Program Name.
  - Program Level – displayed for Loyalty programs only.
  - Points Balance – displayed for Loyalty programs only.
- The list is sorted by card number.
- A badge with the total number of program for which the customer has an account is displayed on the right side of the title bar, as in figure 4-17, above.
- Scroll bars are available if the number of programs do not fit in the display area of the panel.
- If there are no programs assigned to the customer, the following image is displayed:



Offers

An offer is part of a campaign that is intended to provide some purchase incentive to customers. These offers may provide price incentives on a specific item, or 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 The Offers panel of the Customer Dashboard shows current offers for the customer.

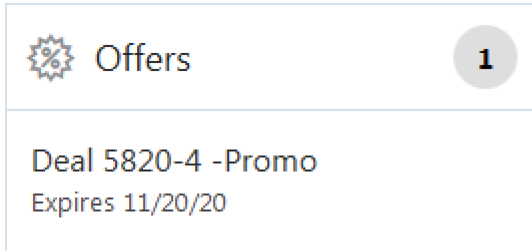
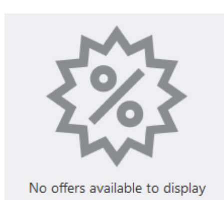


Figure 4-21: Offers

- A badge with the total number of offers the customer is qualified for is displayed in the right side of the title bar, as in figure 4-19, above.
- The following information is displayed for each offer:
  - Offer name
  - Expiration date – the expiration date comes from the promotion of which the offer is a part, or from the coupon expiration date, if the offer has coupons.
- The following offers are displayed:
  - Any offer within an ACTIVE, NOT EXPIRED promotion that is exclusively targeted to a segment the customer is a part of.
  - Any offer within an ACTIVE, NOT EXPIRED promotion that is NOT exclusively targeted.
  - Any offer within an ACTIVE, NOT EXPIRED promotion that is NOT targeted.
  - Any entitlement offer within an ACTIVE, NOT EXPIRED Award promotion, with an Award Program. Requires a card associated to the program for the customer.
- A maximum of 25 offers are displayed.
- The offers are sorted by expiration date in ascending order.
- Scroll bars are available if the number of offers do not fit in the display area of the panel.
- Exclusive offers are indicated with an icon next to the exclusive offer. When you hover over the icon, the text “Exclusive Offer” is displayed. Entitlements are exclusive offers. Promotional offers can be exclusive or general.
- If there are no offers assigned to the customer, the following image is displayed:



Segments

The Segments panel displays the manual and unstratified segments to which the customer belongs.

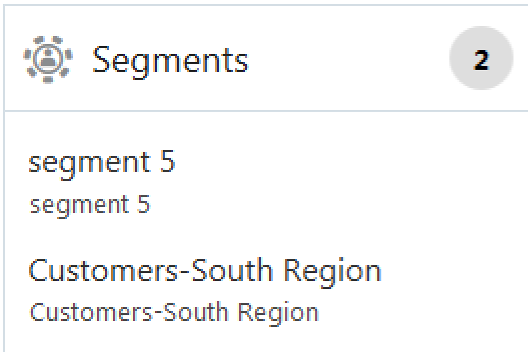
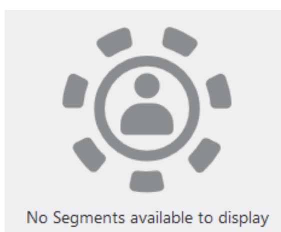


Figure 4-22: Customer Segments

- A badge with the total number of segments to which the customer belongs is displayed on the right side of the title bar, as in figure 4-22, above.
- The following information is displayed for each segment:
  - Segment name
  - Segment description
- If a segment is designated as private, it is only displayed for the user who created it.
- Scroll bars are available if the number of segments do not fit in the display area of the panel.
- If there are no segments assigned to the customer, the following image is displayed:



Notes

The Notes panel of the Customer Dashboard provides information about the last 25 Notes written about the Customer.

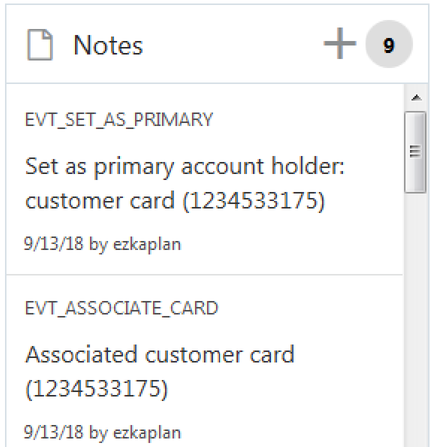
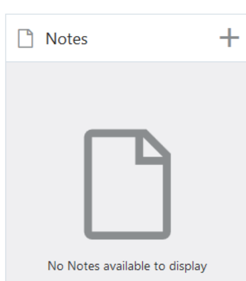


Figure 4-23: Notes

- A badge with the total number of notes for the customer is displayed on the right side of the title bar, as in figure 4-20, above.
- The following information is displayed for each note:
  - The note type.
  - The first three lines of the note.
  - The date the note was created
  - The user name of the person who create the note.
- If a note is marked as private, the details of the note are masked to all associates except for the note creator or an associate with the System Administrator role.
- A maximum of 25 notes are displayed.
- The notes are sorted by update date in descending order.
- Scroll bars are available if the number of notes do not fit in the display area of the panel.
- Notes created within a task do not appear on the list.
- If there are no notes created for the customer, the following image is displayed:



Create a Note

To add a note about the customer, click the plus sign  in the top right corner of the Notes panel. This opens a Create Note window.

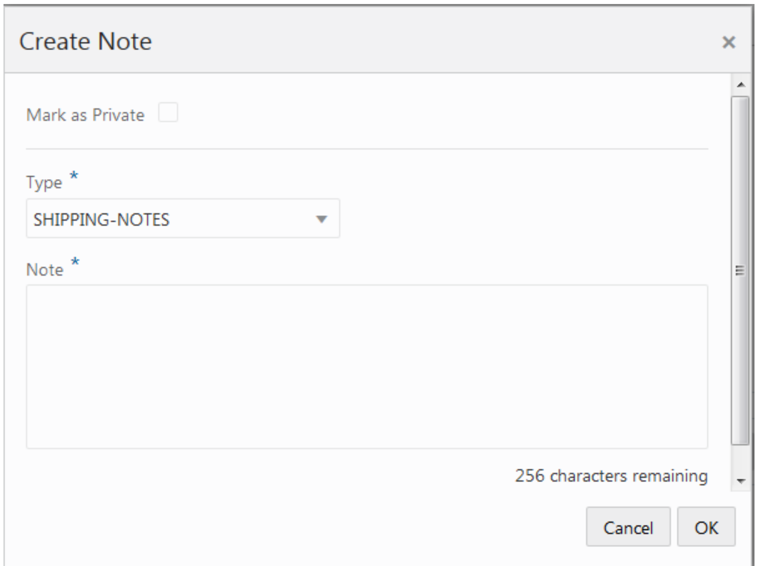


Figure 4-24: Create Note

To create a note:

22. If you want the note to be private, select the **Mark as Private** checkbox, otherwise, leave it de-selected.
23. Select a note type from the Type drop-down list.
24. Enter a note of up to 256 characters in the Note field.
25. Click **OK** when you are finished to save the note. Click **Cancel** if you do not want to add the note.

5

Customer Validation

Overview

Whenever a new Customer is added or updated, the Customer information (first name, last name, prefix, suffix, gender, address, postal code, email address and phone number) 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.

> **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.

Rules for Entering Customer Information

Follow these rules to ensure that the customer information entered is valid:

Names - The first letter of each name, if applicable, is capitalized.

Prefix (Salutation) - The user can enter anything for a prefix.

Suffix - The user can enter anything for a suffix.

Gender - When adding a new customer, select Male or Female from the drop-down list.

Address - Address lines can be left blank.

Postal Code - The user can enter anything for a postal code.

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 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.