

**Oracle® Retail Customer Engagement Cloud
Service**

JET UI User Guide

Release 18.3

F29434-01

March 2020

Copyright © 2020, Oracle and/or its affiliates. All rights reserved.

Primary Author:

Contributors:

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

- (i) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.
- (ii) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Mobile Store Inventory Management.
- (iii) the software component known as **Access Via**™ licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.
- (iv) the software component known as **Adobe Flex**™ licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.

Contents

Send Us Your Comments	xi
Preface	xiii
Audience	xiii
Documentation Accessibility	xiii
Related Documents	xiii
Customer Support	xiii
Review Patch Documentation	xiii
Improved Process for Oracle Retail Documentation Corrections	xiv
Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)	xiv
Conventions	xiv
1	
Navigation	15
About this Guide	15
Navigation	16
2	
Customer Home	19
Overview	19
Search for a Customer	19
Associated Customers List	19
Filtering by Segment	20
Sorting Associated Customers	20
Linking to the Customer Dashboard	20
Associated Customer Actions	20
Day Planner	22
3	
Customer Search	25
Search	25
Rules for Searching	26
Search Criteria	26
Customers Found	27
Sorting Customers	28
Displaying a Customer in the Customer Dashboard	29
Creating a New Customer	29
4	
Customer Dashboard	31
Customer Household	32
Viewing the Customer Household List	32
Personal Lists	33
Actions Menu	34

Customer Information.....	35
Emailing a Customer	35
Editing Customer Details.....	35
Editing Customer Contact Information	37
Viewing Customer Details and Contact Information	43
Attributes	44
Creating an Attribute	45
Editing an Attribute.....	46
Deleting an Attribute.....	46
Activity	47
Item Purchase History.....	47
Purchase Profile.....	53
Viewing Purchase Pattern Details	54
Viewing Purchase History	54
Stratified Segments	54
Viewing Stratified Segment Details.....	56
Viewing Customer Stratified Segments List	56
Cards and Programs	57
Viewing Card Assignments.....	58
Assigning a Card.....	59
Generating a Card.....	59
Offers	60
Promotion History	61
Segments	63
Viewing Customer Segments	63
Notes.....	64
Create a Note	65
Edit a Note	66
Delete a Note	67
Alternate Keys	69
Adding an Alternate Key.....	69
Deleting an Alternate Key	70
Associate Assignment	70
Assigning an Associate	71
Un-assigning an Associate.....	72
Franchisee Assignment	72
Assigning a Franchisee.....	73
Un-assigning a Franchisee	74
Merge.....	74
Merging Customers	75
Preference Center	77
Working with Preference Types	78
Editing a Preference.....	79

Tasks	80
Adding a Task	81
Editing a Task.....	84
Viewing a Task.....	85
5	
Promotions	87
Overview	87
About this Chapter	87
Promotion Search.....	87
Working with Promotion Results	89
Viewing a Promotion.....	90
Creating a Coupon Promotion	91
Working with Coupon Promotions.....	117
Creating a Product Promotion	118
Creating a Message Promotion	120
Creating an Award Promotion.....	122
Promotion Actions	129
Editing a Promotion.....	130
Duplicating a Promotion.....	132
Promotion Scorecard	133
Viewing the Promotion Scorecard.....	133
Promotion Information	139
6	
Offers.....	141
Overview	141
About this Chapter	141
Offer Types	141
Intended Use.....	141
Offers Quick Search	142
Offers Advanced Search.....	143
Creating Offers	146
Editing Offers	179
Duplicating Offers	180
Viewing Offers	182
Offer Scorecard.....	183
7	
Registries	187
Overview	187
About This Chapter	187
Looking Up an Item Registry	187
Creating a Registry	189
Step 1: Information	189

Step 2: Items.....	192
Step 3: Attributes.....	194
Step 4: Addresses	195
Step 5: Review	197
Viewing a Registry	197
Downloading a Registry Report	199
Editing a Registry	201
Deleting a Registry	202
8	
Customer Validation	203
Overview	203
Rules for Entering Customer Information.....	203
9	
Reports.....	205
Overview	205
About this Chapter	205
Report Categories.....	205
Account Management	206
Award Management.....	206
Campaign Management.....	207
Card Management	207
Customer Management.....	207
Item Management.....	208
Location Operations	208
Loyalty Management.....	209
Segment Management.....	210
Tender Account Management.....	210
Registry Management	211
Task Management.....	211
Displaying Reports	211
Running Reports	212
BI Publisher Toolbar	214
View Report Options.....	214
BI Publisher Actions	214
Report Generation Options and Contents	215
Account Management Report	215
Award Management Reports.....	217
Campaign Management Reports	245
Card Management Reports.....	265
Customer Management Reports	268
Item Management Reports	283
Location Operations Reports.....	284

Loyalty Management Reports	293
Segment Management Reports	322
Tender Account Management Reports	333
Registry Management Reports.....	342
Task Management Reports	343

10

Administration	349
Administration Features	349
Associate Role Definition.....	349
Attribute Management	351
Location Management.....	355
Preference Types	359
Task Management.....	361
Exchange Rate	367
Accessing the Exchange Rate Feature	367
Working with the Exchange Rates	368
Security Groups.....	370
Accessing Security Groups	370
Working with the Security Groups	371

Send Us Your Comments

Oracle Retail Customer Engagement Cloud Service, JET UI User Guide, Release 18.3

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- 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?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available in the Oracle Help Center (docs.oracle.com). It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

This guide describes the Customer Engagement Cloud Service 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 Cloud Service. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Customer Engagement Cloud Service Release 18.3 documentation set:

- *Oracle Retail Customer Engagement Cloud Service User Guide*
- *Oracle Retail Customer Engagement Cloud Service 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, 18.0) or a later patch release (for example, 18.0.1). 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 in the Oracle Help Center (docs.oracle.com), 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 in the Oracle Help Center (docs.oracle.com).

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.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)

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

<https://docs.oracle.com/en/industries/retail/index.html>

(Data Model documents can be obtained 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

Navigation

This chapter provides a brief description of how to get started using the Customer Engagement Modern View.

About this Guide

This guide contains the following information:

- [Customer Home](#)
 - [Search for a Customer](#)
 - [Associated Customers List](#)
 - [Day Planner](#)
- [Customer Search](#)
 - [Search](#)
 - [Customers Found](#)
- [Customer Dashboard](#)
 - [Customer Household](#)
 - [Actions Menu](#)
 - [Customer Information](#)
 - [Attributes](#)
 - [Activity](#)
 - [Purchase Profile](#)
 - [Stratified Segments](#)
 - [Cards and Programs](#)
 - [Segments](#)
 - [Notes](#)
 - [Alternate Keys](#)
 - [Associate Assignment](#)
 - [Franchisee Assignment](#)
 - [Merge](#)
 - [Preference Center](#)
 - [Tasks](#)
- [Promotions](#)
- [Offers](#)
- [Registries](#)
- [Customer Validation](#)
- [Reports](#)
- [Administration](#)

Navigation

Navigation Icons

When you first log in to the application, it displays a menu and tool bar that you can use to navigate to other areas of the application. If you have the Customer Home user role, the Home page displays 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 returns you 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 **Reports** icon displays a list of reports that can be run. See [Reports](#) for more information.



The **Customer Search** icon displays the Customer Search page. See [Customer Search](#) for more information.



The **Registries** icon displays a Registry List screen that shows a list of gift registries and wish lists for a customer and creates new gift registries and wish lists. See [Registries](#) for more information.



The **Offers** icon displays the Offers Advanced search which allows you to select more criteria that are not available in the Offer Quick Search box. You can also Create Offers. See [Advance Offers](#) for more information.



The **Promotions** icon displays a Promotion Search which allows you to select criteria to search promotions. You can also Create Promotions. See [Promotion Search](#) for more information.



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



The Overflow Menu provides additional options including Edit, View, and Delete. The following tasks are available in the Customer Engagement Modern View:

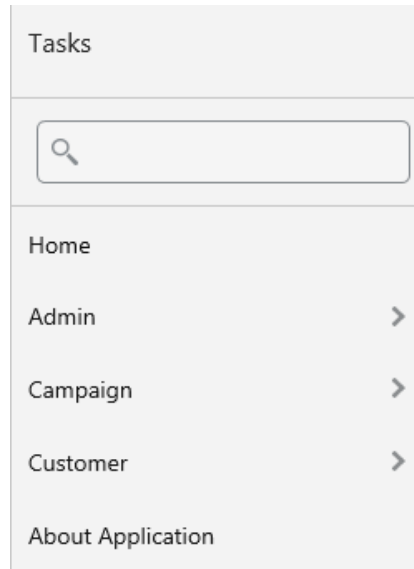


Figure 1-1: Task List

Admin Task List

The Admin Task List contains the following tasks:

- Associate Role Definition
- Attribute Management
- Location Management
- Preference Types
- Task Management

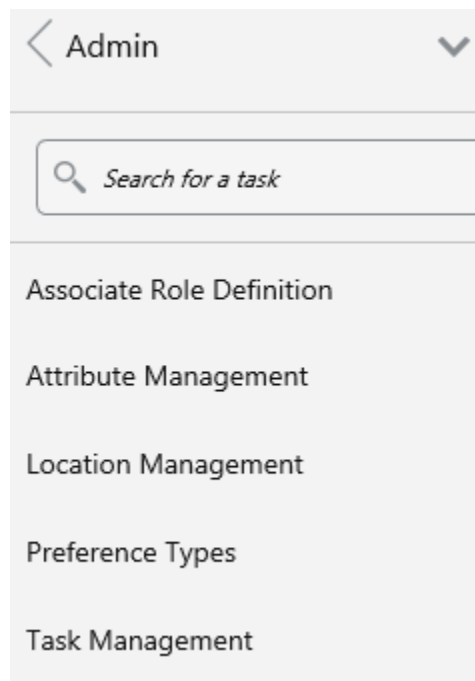


Figure 1-2: Admin Task List

Campaign Task List

The Campaign Task List contains the following tasks:

- Promotion Home (Role Dependent)
- Offers Search
- Promotion Search

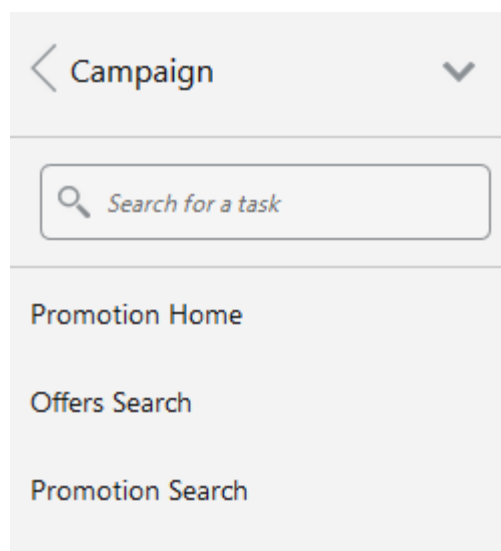


Figure 1-3: Campaign Task List

Customer Task List

The Customer Task List contains the following tasks:

- Customer Home (Role Dependent)
- Customer Search
- Registries

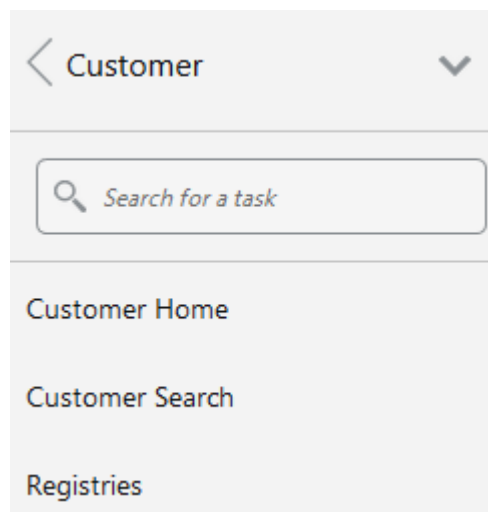


Figure 1-4: Customer Task List

Customer Home

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.

When you log in to the application, it first displays the Home page with the Customer Quick Search panel and the Day Planner panel. If you have customers assigned to you, the Home page search panel will also have a list of Associated Customers. See [Associate Assignment](#) for more information about associated customers.

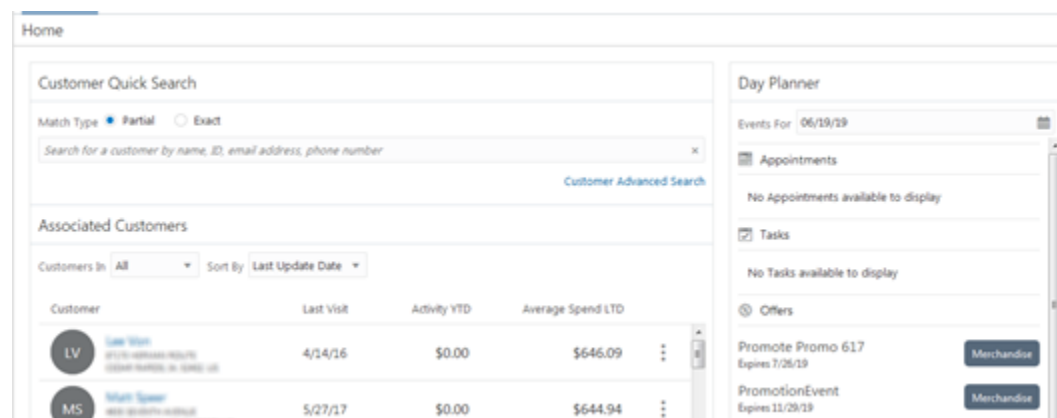


Figure 2-1: Home page

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 results that match part of what you enter, or select **Exact** if you only want results that are an exact match.

Click the Customer Advanced Search link to do an advanced search. See [Customer Search](#) for more information.

Associated Customers List

You can filter for customers by segment and select from a list of sort criteria. There are several actions available on an Action menu in each customer row, including Add to Personal List, Create Appointment, Create Note, Create Registry, and Create To Do. This information is displayed for each customer in the Associated Customers grid:

- Customer – The customer image, icon or initials and the customer’s name and address
- 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.

Filtering by Segment

By default the Associated Customers list includes all customers assigned to the associate regardless of the segments to which they belong. If you do not want to filter by segment, keep the default selection in the Customers In field, as All

To Filter the Associated Customers list by Segment:

1. Click the options list in the Customers In field.
2. Click a segment from the list to filter for only the customers in that segment.

Sorting Associated Customers

You can sort customers in the Associated Customer list by any of the information contained in the grid by making a selection from the items in the Sort by list. These include:

- Average Spend LTD
- Activity YTD
- Last Visit
- Last Name
- First Name
- Address
- City
- State
- Last Update Date

Linking to the Customer Dashboard

You can click on a customer name or image icon in the Associated Customers list to view them in the [Customer Dashboard](#).

Associated Customer Actions

The Actions menu in each row, in the Associated Customers list, provides access to the actions described in the following section:

Add to Personal List

To add a customer to your personal list:

1. In the row of the customer that you want to add, click the **Actions** menu and choose Add to Personal List. This displays the following prompt:

Figure 2-2: Add Customer to Personal List

2. Select a list from the Personal List. A description of the selected list is displayed in the Description field.
3. Click **OK**. This adds the customer to the list.

Create Appointment

To create an appointment for a customer:

1. In the row of the customer for whom you want to create an appointment, click the **Actions** menu and choose **Create Appointment**. This displays the Create Task screen for the customer with the Task Type, Appointment selected.
2. Enter the rest of the details for the appointment and click **OK**. This creates the task and returns you to the Associated Customers list.

For more information, see: [Tasks](#)

Create Note

To create a note for a customer:

1. In the row of the customer for whom you want to create a note, click the **Actions** menu and choose **Create Note**. This displays the Create Note dialog for the customer.
2. Select the Note Type and enter the note in the Note field. If you do not want the note to be seen by others select the Mark as Private check box.
3. Click **OK**. This creates the note and returns you to the Associated Customers list.

For more information, see: [Notes](#)

Create Registry

To create a registry for a customer:

1. In the row of the customer for whom you want to create a registry, click the **Actions** menu and choose **Create Registry**. This displays the Create Registry screen for the customer.
2. Enter the registry details and click **OK**. This creates the registry and returns you to the Associated Customers list.

For more information, see: [Registries](#)

Create To Do.

To create a To Do task for a customer:

1. In the row of the customer for whom you want to create a To Do task, click the **Actions**  menu and choose **Create To Do**. This displays the Create Task screen for the customer with the Task Type, To Do selected.

2. Enter the rest of the details for the task and click **OK**. This creates the task and returns you to the Associated Customers list.

For more information, see: [Tasks](#)

Day Planner

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

The screenshot shows the 'Day Planner' interface. At the top, there's a title 'Day Planner'. Below it, a field 'Events For' is set to '09/25/19' with a calendar icon to its right. The interface is divided into three main sections: 'Appointments', 'Tasks', and 'Offers'. The 'Appointments' section shows a time slot '3:39 PM' and a 'Check Customer Status' button. The 'Tasks' section shows 'No Tasks available to display'. The 'Offers' section lists several offers with 'Merchandise' buttons: 'Autumn Clearance' (Expires 9/27/19), 'Winter Presales' (Expires 10/31/19), 'BaseCustomer-Pro...' (Expires 12/31/19), 'JS-BatchExporter-Pr...' (Expires 12/31/19), 'Promo for non ETL ...' (Expires 4/30/20), and 'Promo for Deal 6756' (Expires 5/23/20).

Figure 2-3: Day Planner

Click the **calendar** icon in the Events 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* appears.
- **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* appears.
- **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* appears.

Customer Search

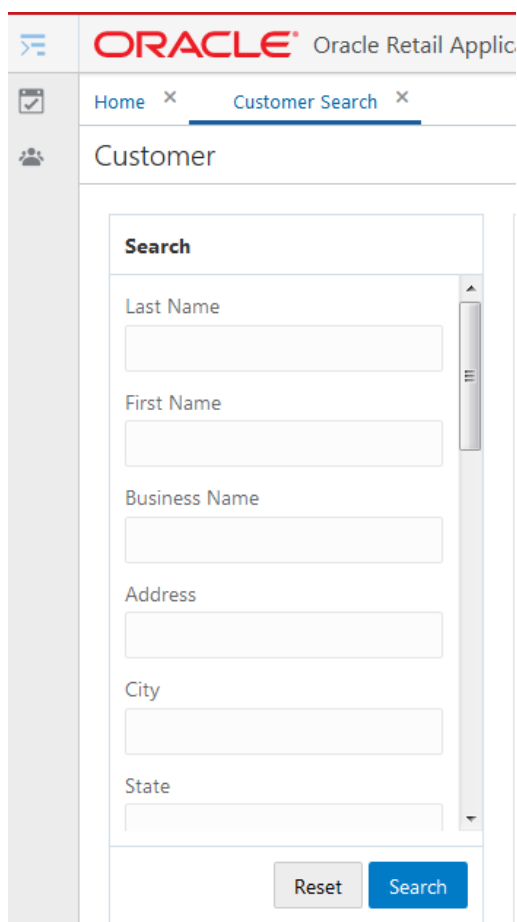
Use the Customer Search page to find an existing customer to work with.

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.



The screenshot shows the Oracle Retail Application interface. The top header features the Oracle logo and the text 'Oracle Retail Application'. Below this is a navigation bar with two tabs: 'Home' and 'Customer Search'. The 'Customer Search' tab is active. The main content area is titled 'Customer' and contains a 'Search' section. This section has a vertical scrollable list of input fields for 'Last Name', 'First Name', 'Business Name', 'Address', 'City', and 'State'. At the bottom of the search section are two buttons: 'Reset' and 'Search'.

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**.
- **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.

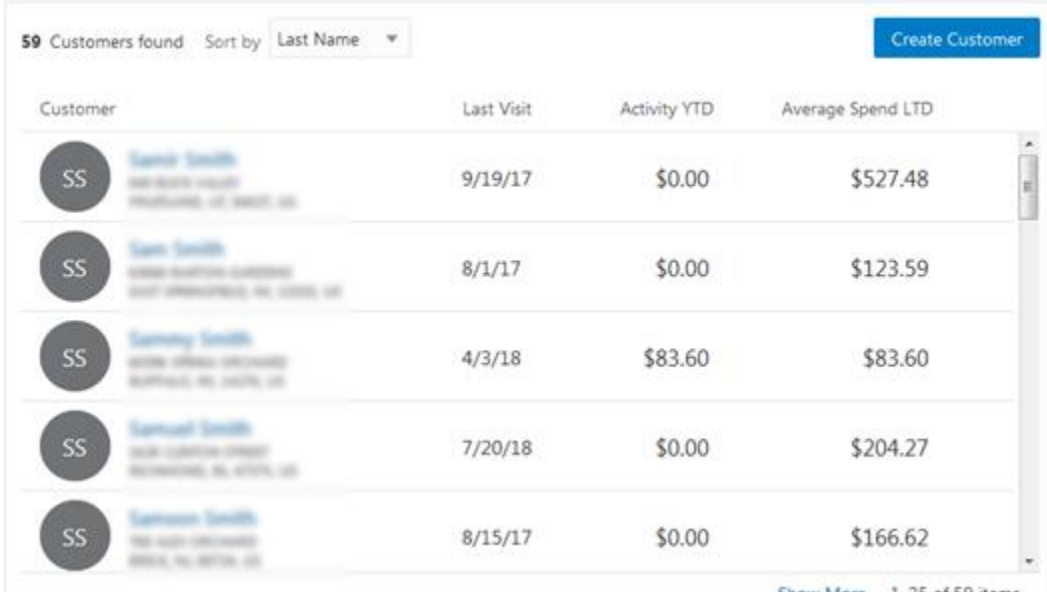
- **Associate ID** - ID of an Associate assigned to the customer. Searching on associate ID requires an exact match.
- **Segment** - Name and ID of a customer segment. Segments are listed alphabetically by Segment Name in ascending order with All segments at the top. Optionally, select an existing segment 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.



Customer	Last Visit	Activity YTD	Average Spend LTD
SS [Customer Name]	9/19/17	\$0.00	\$527.48
SS [Customer Name]	8/1/17	\$0.00	\$123.59
SS [Customer Name]	4/3/18	\$83.60	\$83.60
SS [Customer Name]	7/20/18	\$0.00	\$204.27
SS [Customer Name]	8/15/17	\$0.00	\$166.62

Show More... 1-25 of 59 items

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 initials, 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* displays.
- 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.

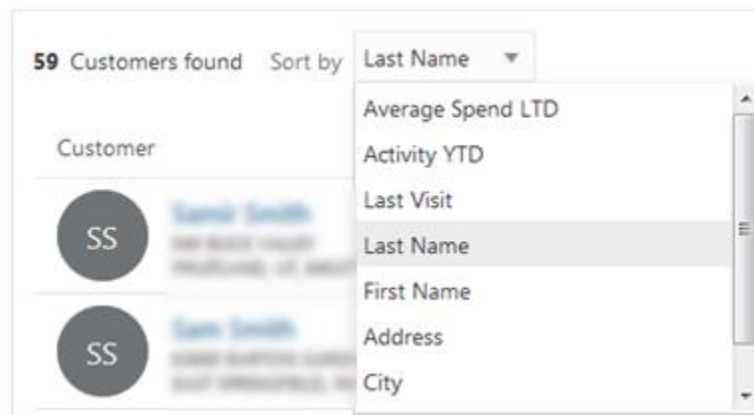


Figure 3-3: Sort-by Options

Sorting Customers

You can use the Sort by 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.
- **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

There are two ways to access the Customer Dashboard. In Task Management, use the Search panel to list tasks. The customer names appear as a link that you can click. You can also 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** 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 on 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.

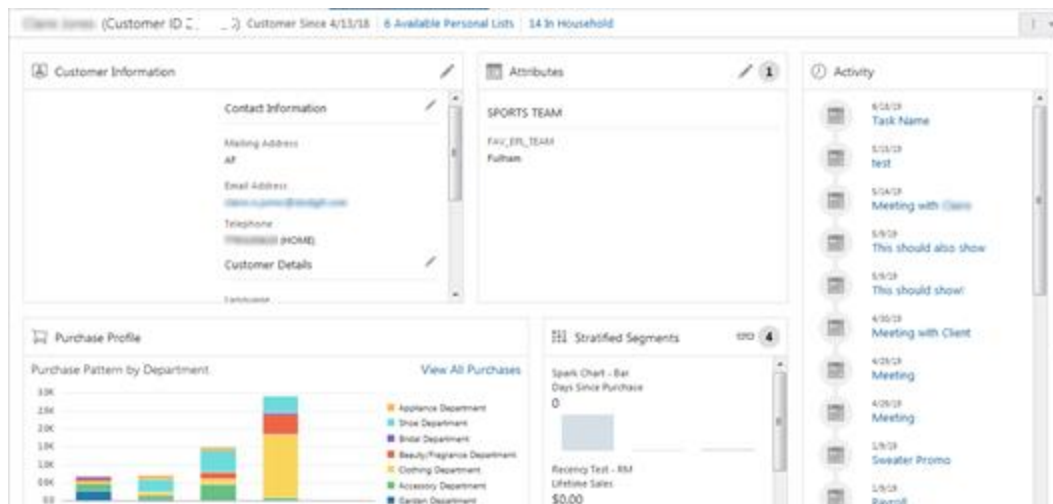


Figure 4-1: Customer Dashboard

Information on the Customer Dashboard is divided into these sections:

- The header bar displays the Customer Name and ID, start date, Personal Lists, Number in [Customer Household](#) and [Actions menu](#).
- **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](#).
- **Cards and 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 Household

The Customer Household includes members of a household that a customer is a part of, so that it is possible to direct marketing efforts to a household, rather than each individual member. Household members can be included in this list if they share the same last name and address, or if they only share the same address.

Viewing the Customer Household List

To display the Customer Household list:

1. Display the customer in the Customer Dashboard, for example by clicking on the customer name or image in the Customer List.
2. In the header of the Customer Dashboard, look for the (Number) in Household link. This link will only display if there is more than one household member.
3. Click the (Number) in Household link. This displays the Customer Household list:

Household for [Customer Name] (Customer ID: [ID])					
Household Batch Last Run On: 6/4/19					
Household Activity					
Activity YTD: \$2,911.62		Activity Count YTD: 6		Activity LTD: \$8,677.42	
				Activity Count LTD: 30	
Customers In Household Sort By: Activity YTD					
Name And Address	Last Visit	Activity YTD:	Activity Count YTD:	Activity LTD:	Activity Count LTD:
Diana Smith	12/6/18 Location: WNC	\$2,911.62	6	\$8,023.80	32
BW	12/14/17	\$0.00	0	\$81.51	1
FR	11/3/17	\$0.00	0	\$81.51	1
NM	11/3/17	\$0.00	0	\$81.51	1

Figure 4-2: Customer Household

The Household list displays the following view-only information:

- The date the Household batch was last run
- Household Activity – Summarizes the transaction activity of the household by these metrics:
 - Activity YTD – The amount of the total year-to-date transaction activity for the whole household.
 - Activity Count YTD – The number of transactions for the whole household for the year to date.
 - Activity LTD – The amount of the total life-to-date transaction activity for the whole household.
 - Activity Count LTD – The number of life-to-date transactions for the whole household.
- You can sort by the Household Activity metrics by selecting from these items on the Sort By list.
 - Activity YTD
 - Activity Count YTD
 - Activity LTD

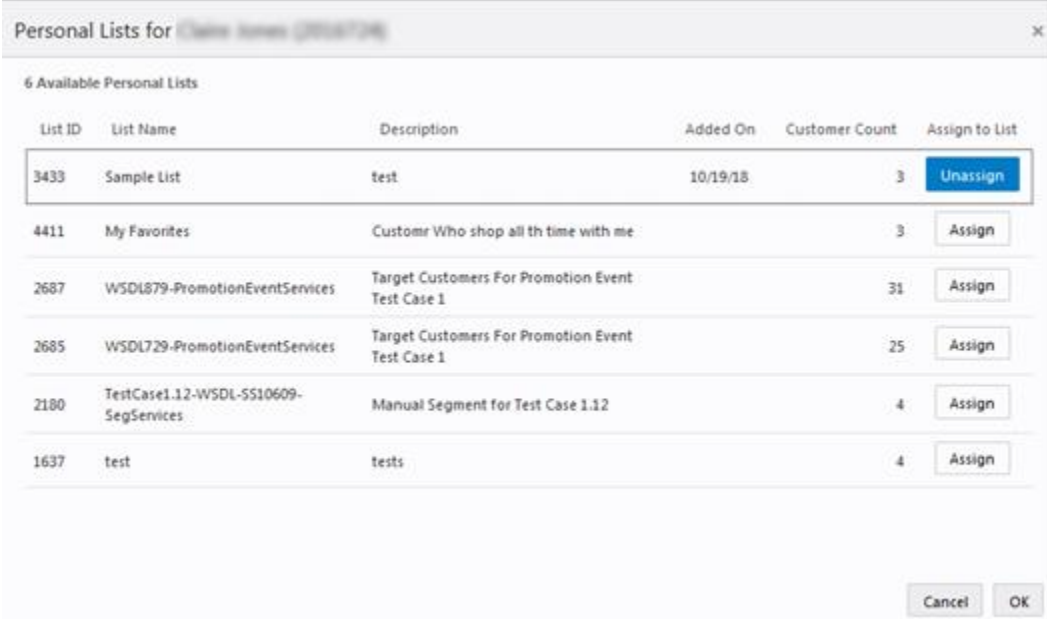
- Activity Count LTD
 - Name and Address – The name and address of the household member, and the customer image, if available.
 - Last Visit – The last date the customer made a purchase.
 - Activity YTD – The amount of the total year-to-date transaction activity for the household member.
 - Activity Count YTD – The household member’s number of transactions for the year to date.
 - Activity LTD – The amount of the total life-to-date transaction activity for the household member.
 - Activity Count LTD – The household member’s number of life-to-date transactions.
4. Use the scroll bars to display hidden information, and then click **Done**. This returns you to the Customer Dashboard.

Personal Lists

The Personal List provides information about all the user-created personal lists (previously known as manual segments) to which the user can associate customers. The Personal Lists link at the top of the Customer Dashboard displays all the private lists created by the associate to which the customer may be assigned.

To Assign and Unassign Personal Lists:

1. Click the (#) Available Personal Lists link at the top of the Customer Dashboard. This displays the associate’s available Personal Lists, with the ones that include the customer listed first.



Personal Lists for **John Jones (20187146)**

6 Available Personal Lists

List ID	List Name	Description	Added On	Customer Count	Assign to List
3433	Sample List	test	10/19/18	3	Unassign
4411	My Favorites	Customer Who shop all th time with me		3	Assign
2687	WSDL879-PromotionEventServices	Target Customers For Promotion Event Test Case 1		31	Assign
2685	WSDL729-PromotionEventServices	Target Customers For Promotion Event Test Case 1		25	Assign
2180	TestCase1.12-WSDL-SS10609-SegServices	Manual Segment for Test Case 1.12		4	Assign
1637	test	tests		4	Assign

Figure 4-3: Personal Lists for Customer

The Personal Lists for Customer window displays this information:

- Sorted by Customer Added On date and then by List ID, in descending order
- Customer Bar
 - The number of Available Personal Lists for the customer

- Customer Name and ID
- Available Personal Lists Grid
 - List ID – ID of the list
 - List Name – Name of the List
 - Description – Description of the list
 - Added On – The date on which the customer was added to the list
 - Customer Count – The number of customers on that list.
 - Assign to List – Buttons for assigning (**Assign**) and removing (**Unassign**)
- Scroll bars are available if there are more lists than will fit on the screen
- 2. Add or remove the customer from a list:
 - Click **Assign** to assign a customer to a list
 - Click **Unassign** to remove a customer from a list.
- 3. Click **OK**. This returns you to the Customer Dashboard.

Actions Menu

The actions menu at the top of the Customer Dashboard provides access to several tasks associated with customer management.

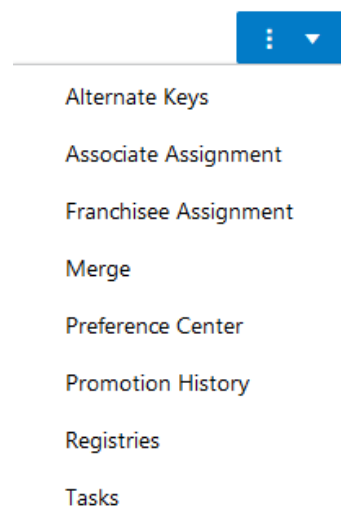


Figure 4-4 Actions menu

- Alternate Keys – Displays the Alternate Keys screen for the customer displayed in the Customer Dashboard. See: [Alternate Keys](#)
- Associate Assignment – Displays the Associate Assignment screen for the customer displayed in the Customer Dashboard. See: [Associate Assignment](#)
- Franchisee Assignment - Displays the Franchisee Assignment screen for the customer displayed in the Customer Dashboard. This option is only displayed if the associate has access to at least one franchisee. See: [Franchisee Assignment](#)
- Merge - Displays the Customer Merge screen for the customer displayed in the Customer Dashboard. See: [Merge](#)
- Preference Center - Displays the Preference Center screen for the customer displayed in the Customer Dashboard. See: [Preference Center](#)
- Promotion History - Displays the Promotion History screen for the customer displayed in the Customer Dashboard. See: [Promotion History](#)

- Registries – Displays the Registries screen for the customer displayed in the Customer Dashboard. See: [Registries](#)
- Tasks - Displays the Customer Tasks screen for the customer displayed in the Customer Dashboard. See: [Tasks](#)

Customer Information

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

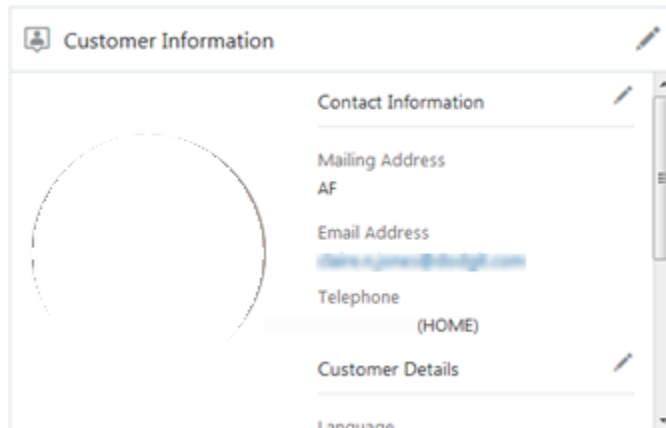


Figure 4-5: Customer Information

- Use the scroll bar or up and down arrow keys to move through the information.
- If the user has read-only access, the View icon  is displayed instead of the Edit icon  icon.

Emailing a Customer

You can click the Email Address link in the customer information panel to send a message to a customer. This link uses the client email server. After you send the message, you are returned to the Customer Information panel.

Editing 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 4-6: 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.

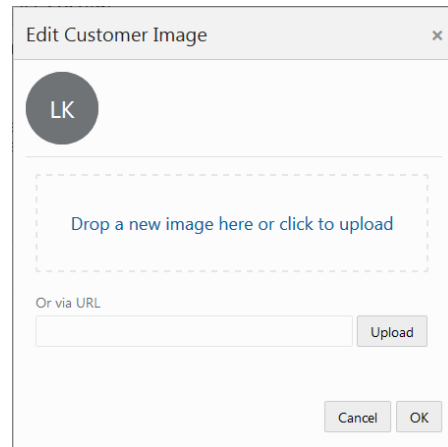


Figure 4-7: Edit Customer Image

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:

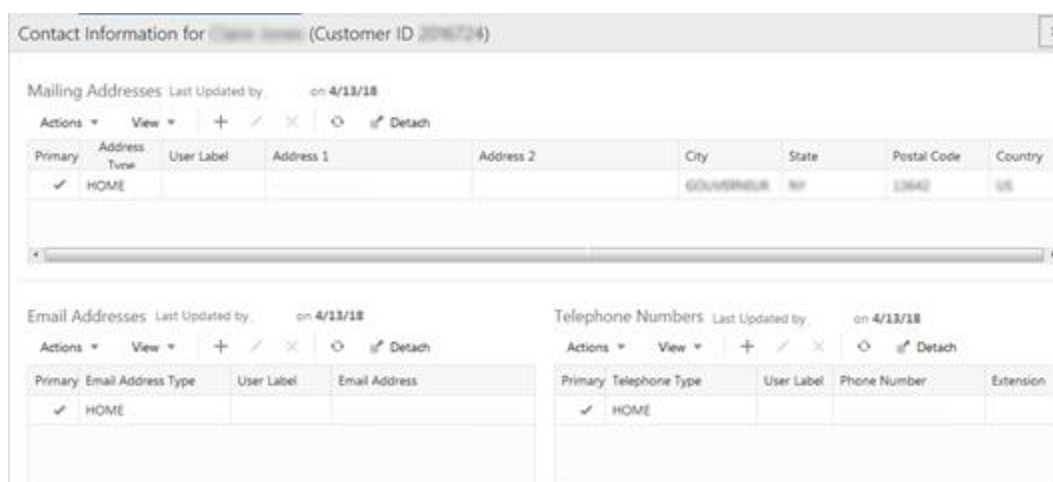
Customer Details:

- **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.

Editing 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.



Contact Information for [Customer Name] (Customer ID 3096724)

Mailing Addresses Last Updated by: on 4/13/18

Actions View + / × ⌂ Detach

Primary	Address Type	User Label	Address 1	Address 2	City	State	Postal Code	Country
✓	HOME				GOVERNMENT	NY	13842	US

Email Addresses Last Updated by: on 4/13/18

Actions View + / × ⌂ Detach

Primary	Email Address Type	User Label	Email Address
✓	HOME		

Telephone Numbers Last Updated by: on 4/13/18

Actions View + / × ⌂ Detach

Primary	Telephone Type	User Label	Phone Number	Extension
✓	HOME			

Figure 4-8: Edit Customer Contact Information

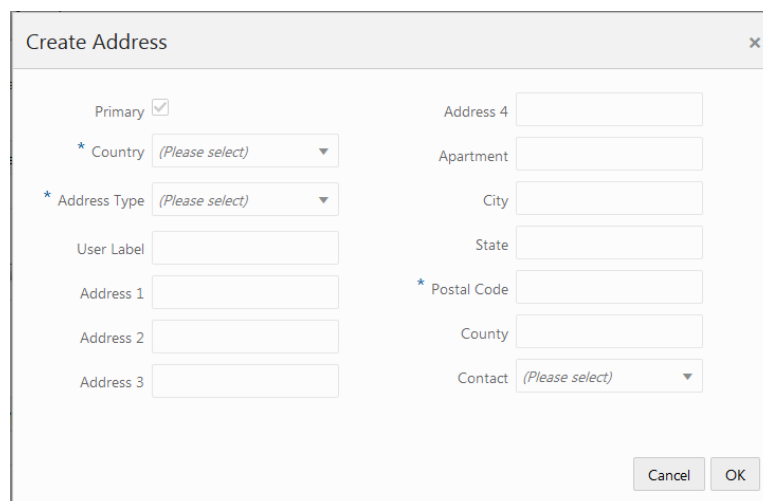
Customer Contact information includes the following:

- **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.



The 'Create Address' dialog box contains the following fields and controls:

- Primary:** A checkbox that is checked by default.
- * Country:** A dropdown menu with '(Please select)' as the placeholder.
- * Address Type:** A dropdown menu with '(Please select)' as the placeholder.
- User Label:** A text input field.
- Address 1:** A text input field.
- Address 2:** A text input field.
- Address 3:** A text input field.
- Address 4:** A text input field.
- Apartment:** A text input field.
- City:** A text input field.
- State:** A text input field.
- * Postal Code:** A text input field.
- County:** A text input field.
- Contact:** A dropdown menu with '(Please select)' as the placeholder.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom right.

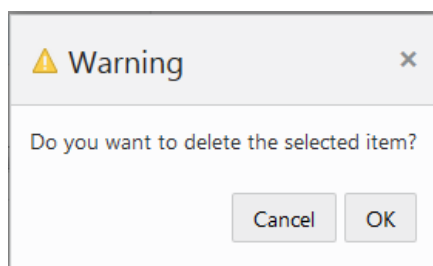
Figure 4-9: Create Address Dialog

2. Enter the information for the new address (see field descriptions in the following section) 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:

1. In the Contact Information editing panel under Mailing Addresses, select the address you want to delete.
2. Choose **Delete Address** from the Actions menu, or click the **Delete**  icon. This displays a Warning message:



The 'Warning' dialog box contains the following elements:

- Title Bar:** A yellow warning triangle icon followed by the text 'Warning' and a close button (X).
- Message:** The text 'Do you want to delete the selected item?'.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom.

Figure 4-10: Warning

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

To edit a mailing address:

1. 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:

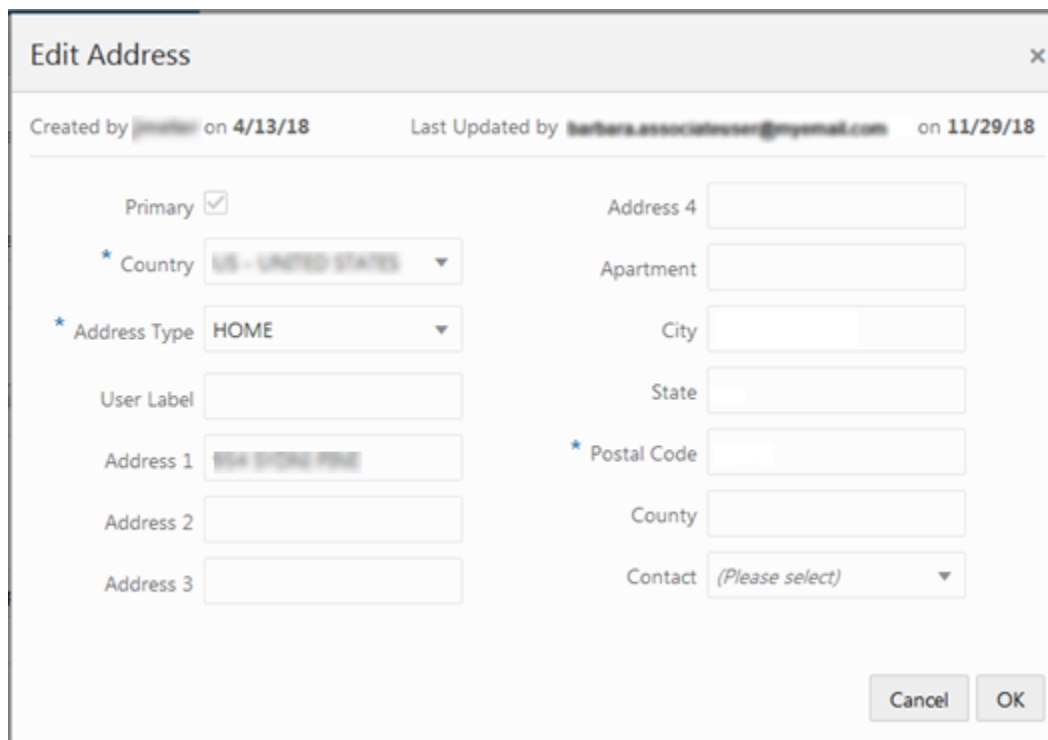


Figure 4-11: Edit Address Dialog

2. Edit the information for the address ([see field descriptions in the following section](#)) and click **OK**. The edited information is displayed in the Mailing Addresses list.
- If the Primary check box for the address that you are editing was selected, the Primary check box will be disabled in the Edit Address dialog. If the Primary check box for the address that you are editing was not selected, the Primary check box 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:

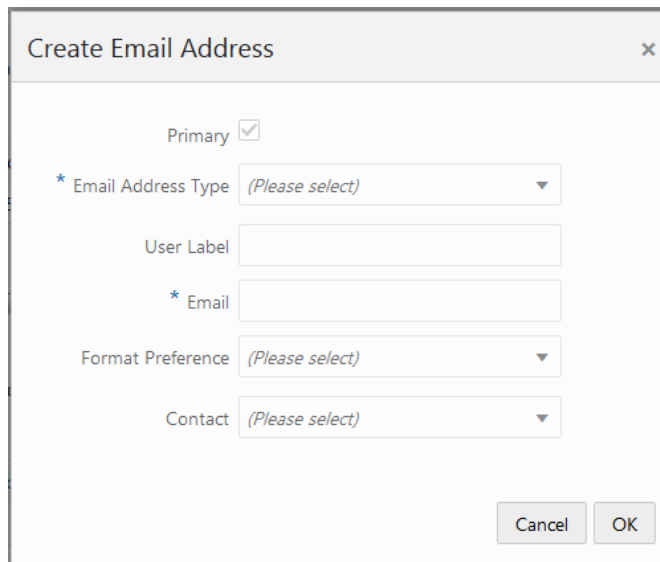
- **Primary** – Indicates whether this is the primary address for the customer.
- **Country** – The country for the customer address. Select a country from the list (required).
- **Address Type** – Indicates the type of address, such as Home or Business. Select a type from the list (required).
- **User 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 list.

Add, Edit, or Delete an Email Address:

To create a new email address:

1. 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:



The dialog box titled "Create Email Address" contains the following fields and controls:

- Primary**: A checkbox that is checked by default.
- * Email Address Type**: A dropdown menu with the text "(Please select)".
- User Label**: A text input field.
- * Email**: A text input field.
- Format Preference**: A dropdown menu with the text "(Please select)".
- Contact**: A dropdown menu with the text "(Please select)".
- Buttons**: "Cancel" and "OK" buttons at the bottom right.

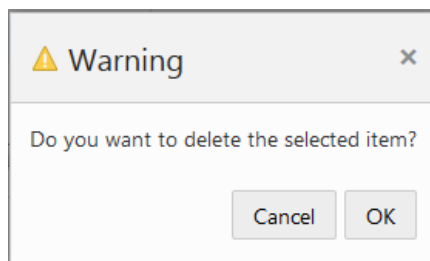
Figure 4-12: Create Email Address Dialog

2. Enter the information for the new email address ([see field descriptions in the following section](#)) 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:

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



The warning dialog box has a yellow triangle icon and the title "Warning". It contains the text "Do you want to delete the selected item?" and "Cancel" and "OK" buttons at the bottom.

Figure 4-13: Warning

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

To edit an Email address:

1. 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.

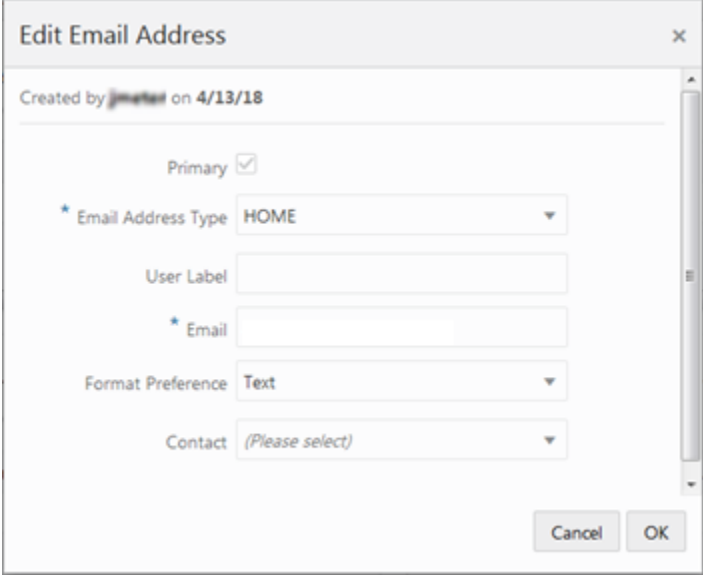


Figure 4-14: Edit Email Address Dialog

2. Edit the information for the email address ([see field descriptions in the following section](#)) and click **OK**. The edited information is displayed in the Email Addresses list.

If the Primary check box is selected for the email address being edited, the Primary check box will be disabled in the Edit Email Address dialog. If the Primary check box is not selected for the email address being edited, the Primary check box 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.

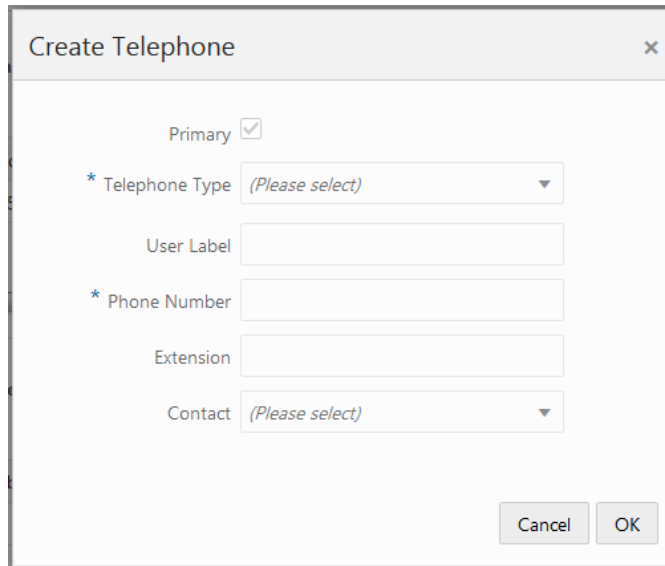
The Create and Edit Email Address dialogs display the following information:

- **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 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 list.
- **Contact** – The contact rule for the email address. Select a contact preference from the list.

Add, Edit, or Delete a Telephone Number:

To create a new telephone number:

1. 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.



The 'Create Telephone' dialog box contains the following fields and controls:

- Primary:** A checkbox that is checked by default.
- * Telephone Type:** A dropdown menu with the text '(Please select)'.
- User Label:** A text input field.
- * Phone Number:** A text input field.
- Extension:** A text input field.
- Contact:** A dropdown menu with the text '(Please select)'.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom right.

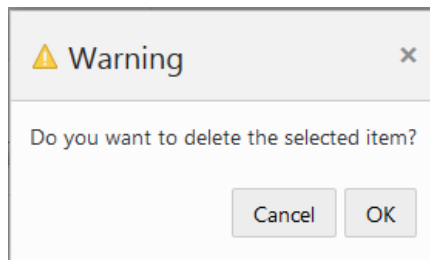
Figure 4-15: Create Telephone Dialog

2. Enter the information for the new number ([see field descriptions in the following section](#)) 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:

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



The 'Warning' dialog box contains the following elements:

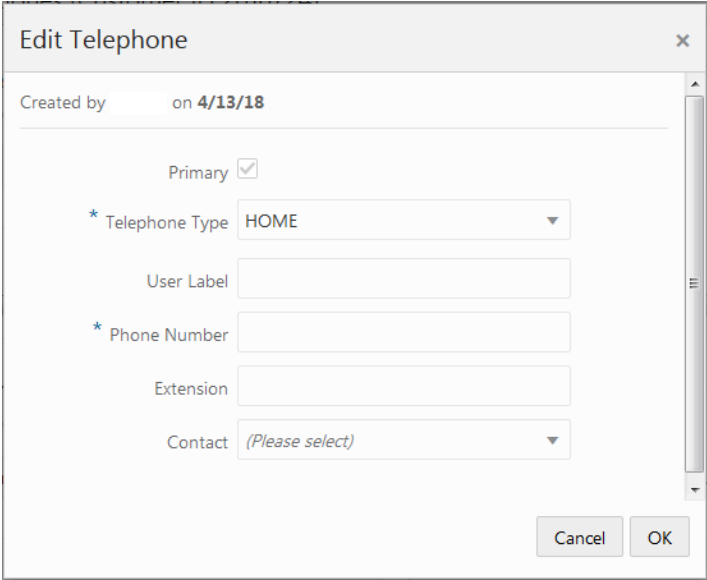
- Warning Icon:** A yellow triangle with an exclamation mark.
- Title:** 'Warning'.
- Message:** 'Do you want to delete the selected item?'.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom right.

Figure 4-16: Warning

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

To Edit a Telephone Number:

1. 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.



The 'Edit Telephone' dialog box is shown. It has a title bar with 'Edit Telephone' and a close button. Below the title bar, it says 'Created by' followed by a blank field and 'on 4/13/18'. The main area contains several fields: a 'Primary' checkbox which is checked, a 'Telephone Type' dropdown menu set to 'HOME', a 'User Label' text field, a 'Phone Number' text field with an asterisk indicating it is required, an 'Extension' text field, and a 'Contact' dropdown menu set to '(Please select)'. At the bottom right are 'Cancel' and 'OK' buttons.

Figure 4-17: Edit Telephone Dialog

2. Edit the information for the number (see [field descriptions in the following section](#)) and click **OK**. The edited information is displayed in the Telephone Numbers list.
- If the Primary check box is selected for the telephone number being edited, the Primary check box will be disabled in the Edit Telephone dialog. If the Primary check box is not selected for the telephone number being edited, the Primary check box 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 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 list.

Viewing Customer Details and Contact Information

If you have read-only access, you will see the **View** icon in the Customer Information panel  instead of the **Edit**  icon.

- To view both customer details and contact information, click the **View** icon  at the top of the Customer Information panel.

- To view just customer contact information, click the **View** icon  at the top of the Contact Information section.
- To view just customer details, click the **View** icon  at the top of the Customer Details section.

See the previous sections for more information on the fields displayed in View mode.

Attributes

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

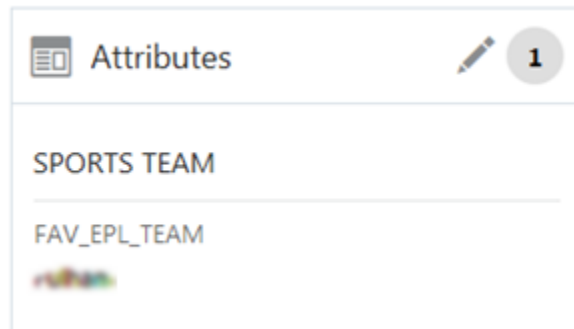
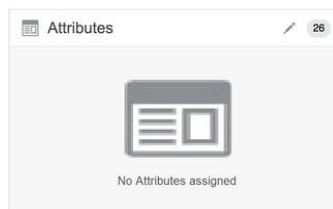


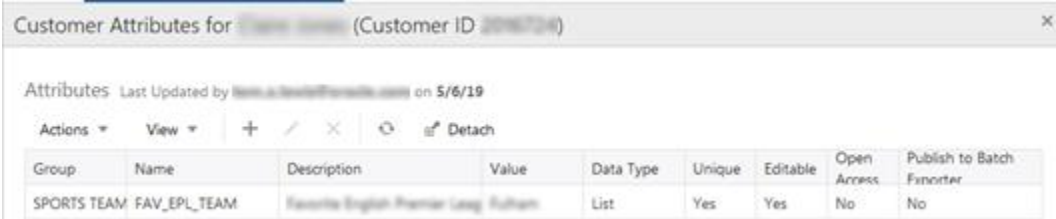
Figure 4-18: Customer Attributes

- A badge with the total number of attributes assigned to the customer displays on the right side of the title bar.
- An Edit icon  displays next to the badge. This lets you access controls for editing, creating, and deleting attributes.
- 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 precedes the attribute value.
- If attributes are assigned to a group, those attributes are sorted by group, and the group name precedes 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:



Creating an Attribute

1. Click the Edit icon  at the top of the Attributes panel.
This displays screen with details of the customer's attributes:



Group	Name	Description	Value	Data Type	Unique	Editable	Open Access	Publish to Batch Exporter
SPORTS TEAM	FAV_EPL_TEAM	Favorite English Premier League Football		List	Yes	Yes	No	No

Figure 4-19: Customer Attributes Details

The following controls are available in the toolbar:

Actions menu – The Actions menu has options that correspond to the **Add**, **Edit**, and **Delete** icons. See the following descriptions:

Add  Displays a dialog that lets you create a new customer attribute

Edit  Displays a dialog that lets you edit a selected customer attribute.

Delete  Deletes a selected customer attribute.

The following information is displayed for each attribute:

Group – The group associated with the attribute.

Name – The name of the attribute.

Description – Description of the information provided by the attribute.

Value – The value set for the attribute.

Data Type – The type of data contained in the attribute value.

Unique – Only one value can be added to the attribute when it is identified as unique.

Editable – Identifies whether the associate is allowed to edit the value for the attribute once it is added.

Open Access – Indicates whether there is open access to this attribute.

Publish to Batch Folder – Indicates whether the attribute has been made available for export to a marketing system such as Responsys.

2. Click the **Add**  icon, or choose **Add** from the Actions menu. This displays a Create Attribute dialog:

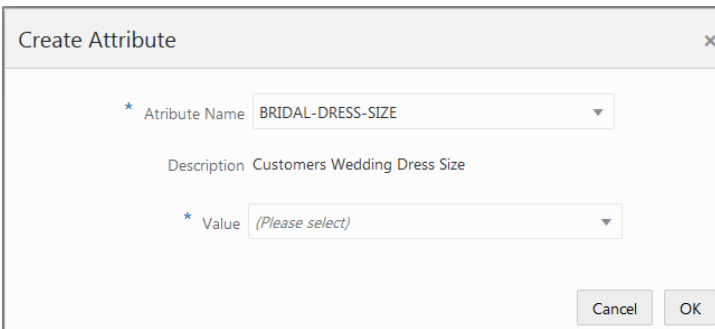
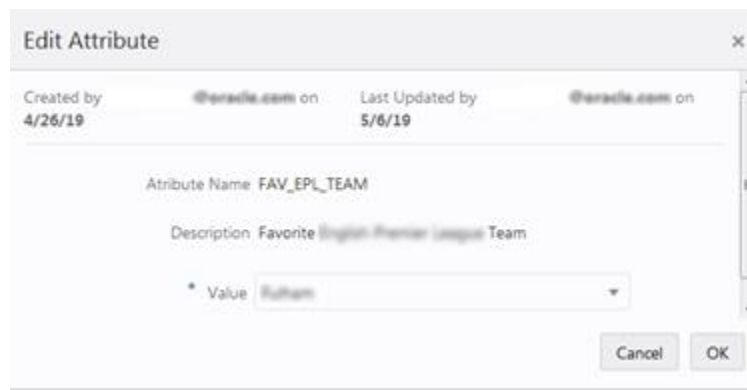


Figure 4-20: Create Attribute Dialog

3. Select a name from the **Attribute Name** list.
4. Select a value from the **Value** list.
5. Click **OK**. This adds the new attribute to the list of attributes for the customer.

Editing an Attribute

1. Click the **Edit** icon  at the top of the Attributes panel.
This displays a screen with details of the customer's attributes:
2. Select the attribute that you want to edit.
3. Click the **Edit** icon  at the top of the detail screen, or choose **Edit** from the Actions menu.
4. . This displays an Edit Attribute dialog with details of that attribute:



The 'Edit Attribute' dialog box shows the following details:

- Created by:** @oracle.com on 4/26/19
- Last Updated by:** @oracle.com on 5/6/19
- Attribute Name:** FAV_EPL_TEAM
- Description:** Favorite English Premier League Team
- Value:** A dropdown menu currently showing 'Rufan'.

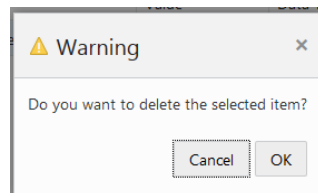
Buttons at the bottom: Cancel, OK.

Figure 4-21: Edit Attribute Dialog

5. Select a new value for the Attribute from the list in the **Value** field.
6. Click **OK** to accept the value. The attribute is displayed with the new value.

Deleting an Attribute

1. Click the **Edit** icon  at the top of the Attributes panel.
This displays a screen with details of the customer's attributes:
2. Select the attribute that you want to delete.
3. Click the **Delete** icon , or choose **Delete** from the Actions menu.
4. . This displays a Warning message:



The 'Warning' dialog box contains the following text:

Do you want to delete the selected item?

Buttons at the bottom: Cancel, OK.

Figure 4-22: Warning

5. Click **OK** to verify that you want to delete the message.
- When you are finished adding, editing or deleting customer attributes, click **Done**, to return to the Customer Dashboard.

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* displays.

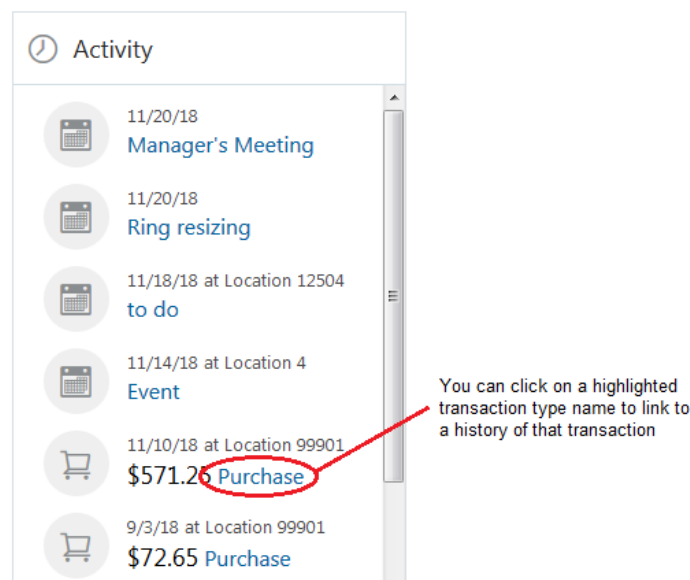


Figure 4-23: Customer Activity

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 the highlighted transaction type name.

Item Purchase History for **Customer ID 2000000000**

Filters

Item Keyword

Transaction ID

Date Range

From: 11/30/17 To: 11/30/17

Unit Price

Min

Reset Apply

Item Purchase History

	Cookware Set (111106002) Purchased on 11/30/17 at 12:54 PM Transaction ID 111106002 SKU: 111106002	Purchased 1 at \$81.00 each (+81 points) Appliance Department, Kitchen Appliances
	Womens Belt - (222200006) Purchased on 11/30/17 at 12:54 PM Transaction ID 222200006 SKU: 222200006	Purchased 1 at \$26.55 each (+26.55 points) Accessory Department, Belts, Belts - Womens

Figure 4-24: Item Purchase History Details

Note: You can also link to the Item Purchase History from the Purchase Profile by clicking 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 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 displays 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.

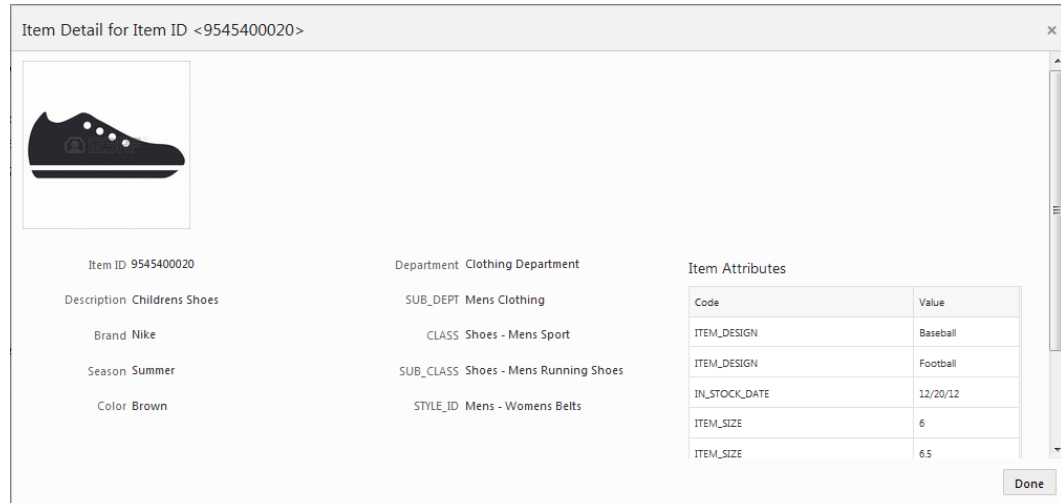
The following information is displayed for each item in the list, if available:

- 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 opens:



Item Detail for Item ID <9545400020>

Item ID 9545400020

Description Childrens Shoes

Brand Nike

Season Summer

Color Brown

Department Clothing Department

SUB_DEPT Mens Clothing

CLASS Shoes - Mens Sport

SUB_CLASS Shoes - Mens Running Shoes

STYLE_ID Mens - Womens Belts

Code	Value
ITEM_DESIGN	Baseball
ITEM_DESIGN	Football
IN_STOCK_DATE	12/20/12
ITEM_SIZE	6
ITEM_SIZE	6.5

Done

Figure 4-25: Item Detail

These details for the item are displayed, if available:

- Item ID
- 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** to close the Item Detail.

Transaction Details

When clicking a specific transaction ID in the Item Purchase History panel, a Purchase Details window displays for that transaction ID.

- The popup has three tabs.
- 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.

Purchase Detail For Transaction ID <32110150>

Purchase Information Line Items Line Item Modifiers

Purchase Details

Purchase 32110150	Exchange 1
	Rate
Grand Total \$114.00	Net Amount \$107.55
Location 99901	Status DELIVERED
Business Date 11/30/17	Start Time 11/30/17 12:54 PM
Void Flag No	End Time 11/30/17 12:54 PM
Register 15	Tax Amount \$6.45
Cashier 101	Points 107.55
	Earned
Currency USD	Linked N/A
	Purchase
Original USD	

Purchase Properties

Code	Value
00000000	Created from QA Test Scripts

Done

Figure 4-26: Purchase Detail – 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

Purchase Detail For Transaction ID <99901000152017113012110150>

Purchase Information **Line Items** Line Item Modifiers

Sales Line Items

	Void Flag	Sequence	Item Id	Actual Price	Quantity	Extended Amount	Regular Price	Unit Cost	Item Type	Scan Id	Department
	No	1	111106002	\$81.00	1	\$81.00	\$85.26	\$47.41	Stock	111106002	800
	No	2	222200006	\$26.55	1	\$26.55	\$27.95	\$15.42	Stock	222200006	925

Tax Line Items

Void Flag	Sequence	Tax Amount	Taxable Amount	Exempt Amount	Exempt Id	Override Amount	Override
No	4	\$6.45	\$107.55				No

Tender Line Items

Done

Figure 4-27: Purchase Detail – 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

Purchase Detail For Transaction ID < 00000000000000000000000000000000 >

Purchase Information Line Items Line Item Modifiers

Commission Line Item Modifiers

Void Flag	Sequence	Commission Amount	Commission Percent	Commission Percent Of Item	Commissioned Employee Id
No	1			1	101
No	2			1	101

Price Line Item Modifiers

Void Flag	Sequence	Price Change Amount	Price Modifier Type	Price Change Reason	Promotion Id
No	1	-\$4.26	Subtract	Sale	
No	2	-\$1.40	Subtract	Sale	

Figure 4-28: Purchase Detail – 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.

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* (*or other entity named by the client) in which the customer purchased products during that year, measured by the amount of spending. Each year in the graph displays the top five revenue departments (or other entities named by the client).

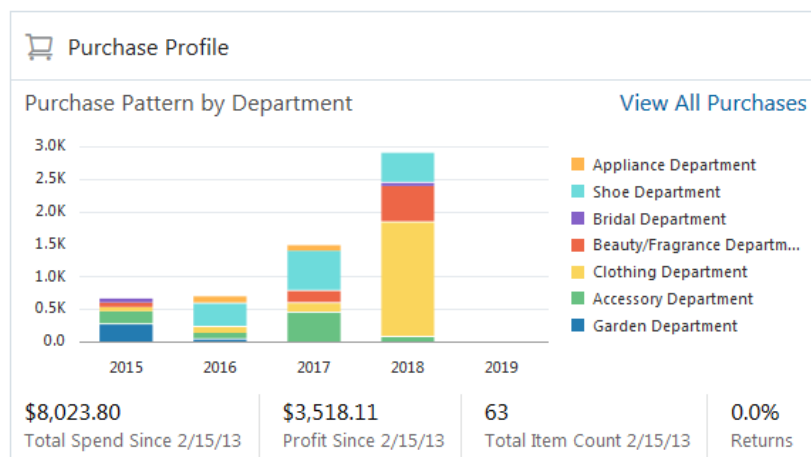
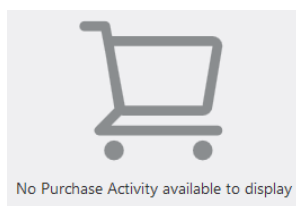


Figure 4-29: Customer Purchase Profile

- Other revenue metrics include:
 - **Total Spend** – 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.
 - **Total Item Count** - Shows the total transaction (purchases minus returns) count for the lifetime of the customer. This includes all transactions, not just the ones represented in the five departments and five years displayed in the graph.
 - **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, an image with *No Purchase Activity available to display* displays:



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.

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.

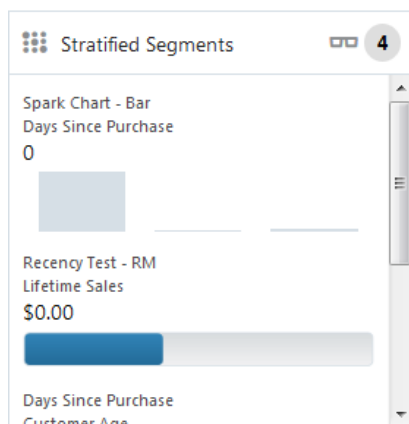
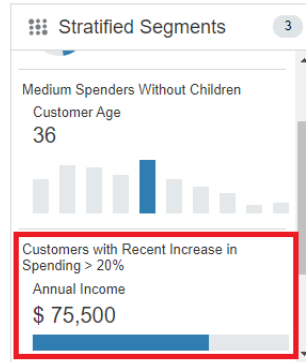
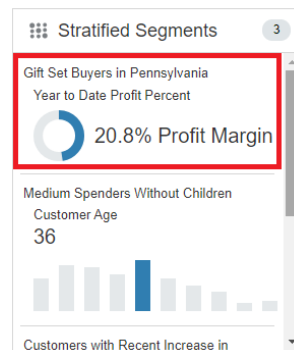


Figure 4-30: Stratified Segments

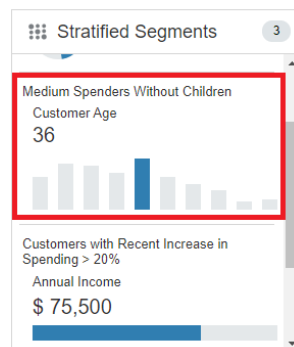
- Stratified segments classified as public are shown. If a stratified segment is classified as private, it will only be shown to the associate who created the stratified segment.
- Three types of graphs are used to represent statistics:
 - Status Meter Gauge – Horizontal, uses horizontal orientation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



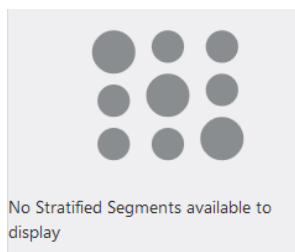
- Status Meter Gauge – Circular, uses circular orientation to indicate thresholds at specific values:



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

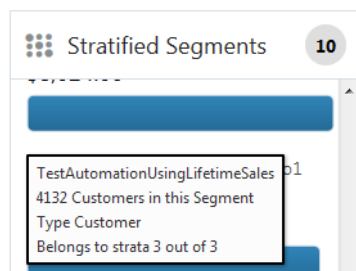


- A badge with the total number of stratified segments to which the customer belongs displays on the right side of the title bar.
- An eyeglass icon  lets you view details about all the Stratified Segments to which the customer belongs. See [Viewing Customer Stratified Segments List](#)
- Scroll bars 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.

Viewing Customer Stratified Segments List

1. Click the eyeglass icon  in the title bar. This displays the Stratified Segments for (Customer) screen:

Segment ID	Segment Name	Description	Create User	Added On	Customer Count	Strata Type	Strata Format	Based On V
3444	Spark Chart - Bar	Spark Chart - Bar		11/13/18	3818333	Transaction	Range Strata	Detail
3470	Recency Test - RM	Testing Chart		11/27/18	3436738	Customer	Atile Strata	Customer
3474	Days Since Purchase	Days Since Purchase		11/29/18	42045	Customer	Atile Strata	Customer
3466	LT Spend	Sample		11/15/18	5121241	Customer	Atile Strata	Customer

Figure 4-31: Stratified Segments for Customer

This screen displays the following view-only information about the stratified segments associated with the customer:

- The Customer Name and ID Number are displayed in the *Segments for* title bar. If there are no segments assigned, the table displays *No Segments Assigned*.
- Assigned Stratified Segments Grid
 - Segment ID – ID of the segment

- Segment Name - Name of the segment
 - Description - Description of the segment
 - Create User - the user who created the segment
 - Added On - the date on which the customer was added to the segment.
 - Customer Count - the number of customers in that segment.
 - Strata Type - (Customer, Loyalty, Transaction)
 - Strata Format - the format used to create the strata. Possible values are:
 - * Range Strata - Strata are determined by configured ranges
 - * Ntile Strata - Strata are formed by equally sized groups of customers.
 - Based on Value - the basis used for determining the Strata field (Header, Detail, Customer, Loyalty Summary, Loyalty Detail)
 - Strata Field - the field used to create the Strata
 - Average Strata Value
 - Number of Strata - the number of strata in the segment
 - Customer Strata - the strata the customer falls into
 - Customer Value
2. Click **Done**. This returns you to the Customer Dashboard.

Cards and Programs

The Cards and Programs panel of the Customer Dashboard includes information about cards held by the customer and about the programs associated with each card. Programs include Tender, Award, and Loyalty. You can assign and generate cards for the customer in this panel.

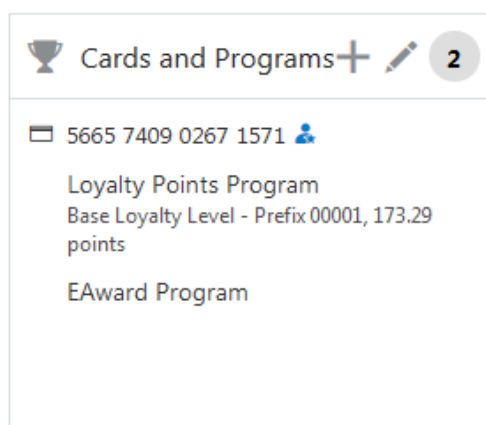
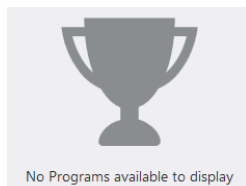


Figure 4-32: Cards and Programs

- The title bar icons let you perform the following actions:
 - + Assign a card or generate an electronic card
 - ✎ Display the Cards and Programs screen for the customer
- Only active programs and 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 next to the programs.
- A badge with the total number of programs for which the customer has an account displays on the right side of the title bar.

- 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:



Viewing Card Assignments

To view details about the cards and programs assigned to the customer:

1. Click the **Edit**  icon in the Cards and Programs title bar. This displays the Cards and Programs for (Customer) screen:

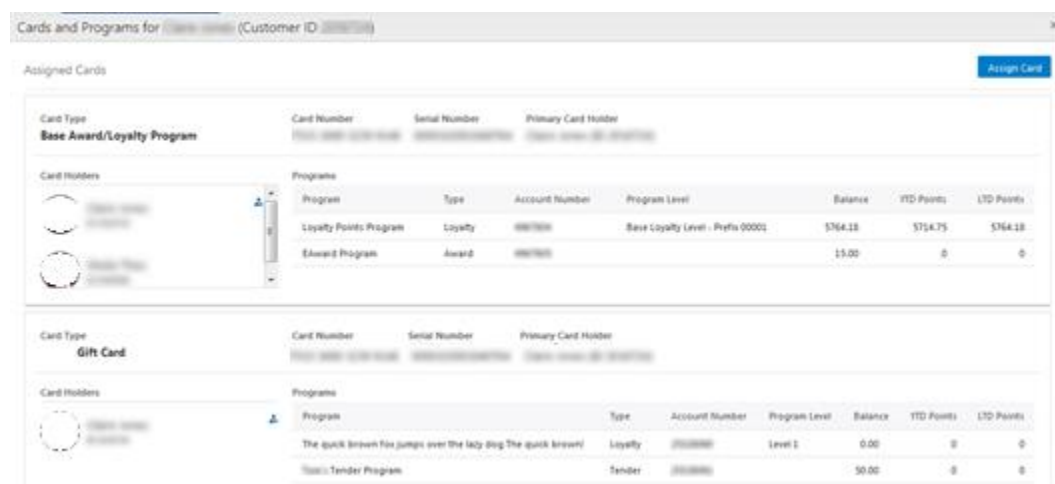


Figure 4-33 Assigned Cards

- The Customer Name and ID number are displayed in the title bar.
- **Assign Card** allows access to the Assign Card to (Customer) dialog. See: [Assigning Cards](#)
- The following fields are displayed for a card:
 - Card Type
 - Card number
 - Serial number
 - Primary Card Holder (Customer Name and ID)
- Card Holders
 - Customer Image, if available, or customer initials
 - Customer Name
 - Primary Card Holder Customer Name and ID
 - Primary Card Holder icon – displayed to the right of the card holder name and ID.
 - Secondary Card Holders Image, Name and ID – There can be multiple secondary card holders
- The following fields are displayed for each program:
 - Program
 - Type
 - Account Number
 - Program Level
 - Balance
 - YTD Points
 - LTD Points

- Program Name
 - Program Type – The type of program: Award, Tender, Loyalty
 - Account Number
 - Program Level – displayed for Loyalty programs only.
 - Balance
 - YTD Points – Year to Date points. This is displayed for Loyalty programs only
 - LTD Points – Lifetime to Date points. This is displayed for Loyalty programs only.
- The list is sorted by card number, where the Customer is a primary cardholder first.

Assigning a Card

To assign a card:

1. Click **Assign** ⁺ in the Cards and Programs panel header or click **Assign Card** in the Cards and Programs for (Customer) detail screen. Either action displays the Assign Card to (Customer) dialog:

Figure 4-34: Assign Card to (Customer)

2. Select **Enter Existing Card**. This populates the dialog with Search for Card field:

Figure 4-35: Search for Card

3. In the Search for Card field, enter the full Card Number or Serial Number of the card you want to assign. Do not use spaces.
4. Click **Search**. This populates Selected Card Details with the Card Number, Serial Number, and Primary Card Holder of the card, if one exists.
5. Click **Enroll** to assign the card to the customer. This returns you to the previous screen with the new card displayed for the customer.

Generating a Card

To generate a card:

1. Click **Assign** in the Cards and Programs panel header or click **Assign Card** button in the Cards and Programs for (Customer) detail screen. Either action displays the Assign Card to (Customer) dialog (see [Figure 4-34](#)).
2. By default, Generate New Card is selected. Keep this selection.
3. Select a Card Type from the list.
4. Click **Enroll** to generate a new electronic card for the customer. This returns you to the previous screen with the new card displayed for the customer.

Note: If you select a valid card series where all cards have been assigned or generated already, clicking **Enroll** displays a message: *No cards found for selected card type.*

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.

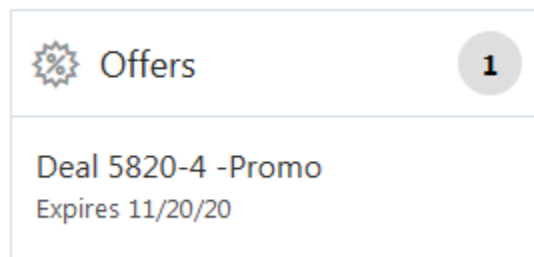
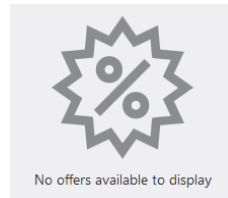


Figure 4-36: Offers

- A badge with the total number of offers the customer is qualified for displays on the right side of the title bar.
- 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* displays. Entitlements are exclusive offers. Promotional offers can be exclusive or general.
- If there are no offers assigned to the customer, the system displays the following image:



- There is a View Promotion History link at the bottom of the Offers panel that provides access to the Promotion History screen. See the following [section](#) for details.

Promotion History

When you click the View Promotion History link in the Offers panel or choose the Promotion History option from the Actions menu on the Customer's Dashboard, the Promotion History screen is displayed.

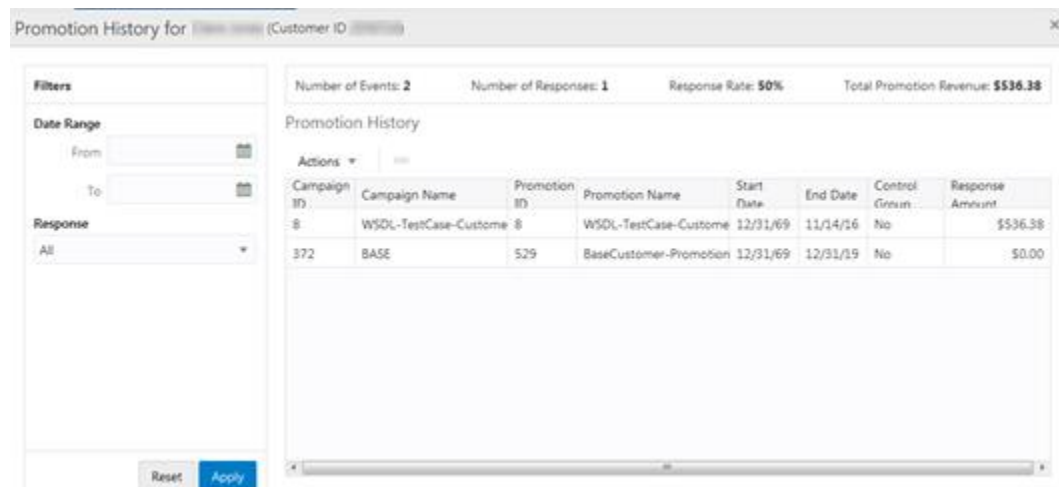


Figure 4-37: Promotion History

The Promotion History screen displays metric summary information and detail information about specific promotion events for the selected customer. You can filter the list of events by date range and response type.

Filters Panel

You can filter the list of promotion events using these controls:

- Date Range – Select a date range in the From and To calendar fields to filter on promotion events in only that date range
- Response – Select a promotion response from the list to filter on one of the following response types:
 - All
 - None
 - Generated Revenue

Click **Apply** to apply the filter, or **Reset** to clear the filter.

Promotion History Panel

The Promotion History panel lists the filtered promotion events and summarized metrics for the set of events. The following information is provided:

- Metrics:
 - 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 date range of the search.
 - Response Rate – The percentage of available promotions to which the customer has responded within the date range of the search.
 - Total Promotion Revenue – The total revenue received from customer responses to promotions within the date range of the search.
- The following information is displayed in the Promotion History table for each event:
 - Campaign ID
 - Campaign Name
 - Promotion ID
 - Promotion Name
 - Start Date
 - End Date
 - Control Group
 - Response Amount
- The Promotion History list is sorted by Response Amount in descending order (highest value first).
- If there are no promotions for the customer, the message *No Promotions Available to Display* displays.

Viewing Promotion Event Detail

You can see more detail about an event in a view-only window following these steps:

1. Select the event in the grid that you want to view.
2. From the Actions menu, choose **View**, or click the **View**  icon.

This displays the event in a view-only window:

Promotion: WSDL-TestCase-CustomerSecurity-V3_0 (8) ×		
Campaign: WSDL-TestCase-CustomerSecurity-V3_0 (8)		
Offer Name	Date	Amount
LineItemDeal	11/14/16	\$536.38
		Total: \$536.38
Done		

Figure 4-38: Promotion Event Detail

3. Click **Done**. This returns you to the Promotion History window.
4. To return to the Customer Dashboard, click **Done**.

Segments

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

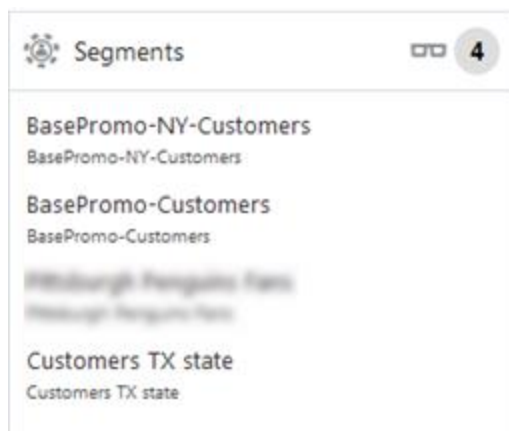
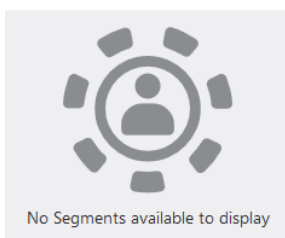


Figure 4-39: Customer Segments

- An eyeglass icon  lets you view details about all the Segments to which the customer belongs. See Viewing Customer Segments
- A badge with the total number of segments to which the customer belongs displays on the right side of the title bar.
- 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:



Viewing Customer Segments

1. Click the eyeglass icon  in the title bar. This displays the Segments for (Customer) screen:

Segments for *Base Promo* (Customer ID 2096724)

Assigned Unstratified Segments

Segment ID	Segment Name	Description	Create User	Added On	Customer Count
3421	BasePromo-NY-Customers	BasePromo-NY-Customers		7/9/18	310765
3417	BasePromo-Customers	BasePromo-Customers		7/9/18	1505299
3437	Pittsburgh Penguins Fans	Pittsburgh Penguins Fans		10/19/18	4
2864	Customers TX state	Customers TX state		8/1/17	538801

Figure 4-40: Segments for Customer

This screen displays the following view-only information about the segments associated with the customer:

- The Customer Name and ID Number are displayed in the *Segments for* title bar. If there are no segments assigned, the title displays *No Segments Assigned*.
- Assigned Unstratified Segments Grid
 - Segment ID – ID of the segment.
 - Segment Name – Name of the segment.
 - Description – Description of the segment.
 - Create User – the user who created the segment.
 - Added On – the date on which the customer was added to the segment.
 - Customer Count – The number of customers in that segment.

2. To return to the Customer Dashboard, click **Done**.

Notes

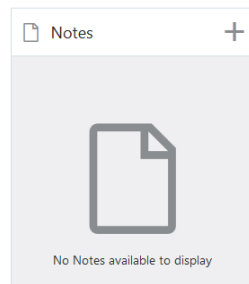
The Notes panel of the Customer Dashboard provides information about the last 25 Notes written about the Customer.

Notes	+	✎	6
SHIPPING-NOTES			
jkdhfal;skdhf			
11/15/18			
NOTE			
Customer is going on vacation next month to Hawaii			
11/15/18			
EVT_SET_AS_PRIMARY			

Figure 4-41: Notes

- A badge with the total number of notes for the customer displays on the right side of the title bar.
- 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:

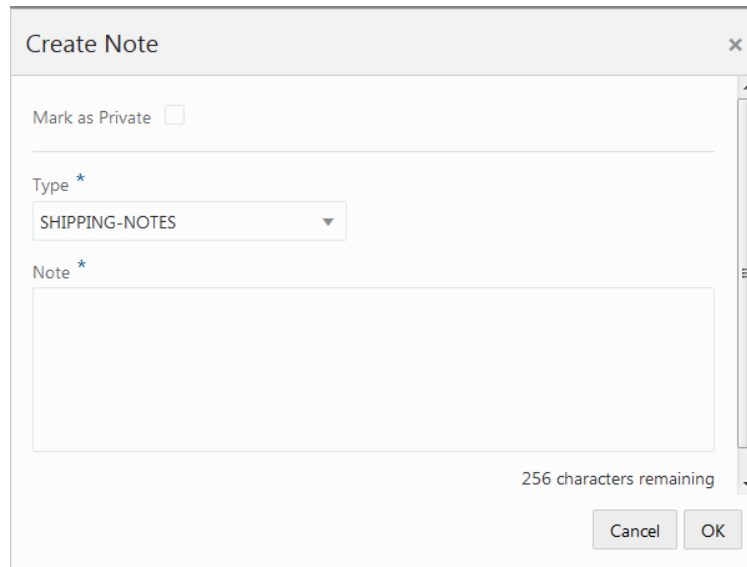


Create a Note

To add a note about the customer, use one of these methods to display the Create Note window:

- Click the plus sign  in the top right corner of the Notes panel.
- Click the Edit icon  in the top right corner of the Notes panel to display the Notes for Customer list, and use either action:
 - Click the plus sign  in the toolbar
 - From the Actions menu, choose **Add**.

Any of the actions display the Create Note window:



Create Note [X]

Mark as Private ☐

Type *
SHIPPING-NOTES ▼

Note *
[Text Area]

256 characters remaining

Cancel OK

Figure 4-42: Create Note

To create a note:

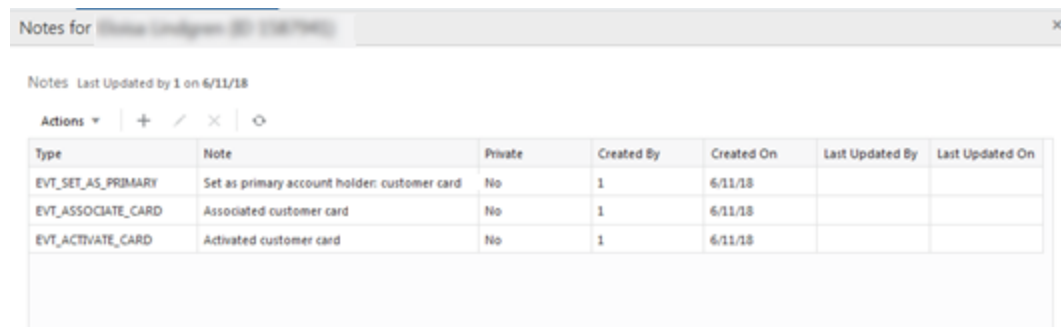
1. If you want the note to be private, select the **Mark as Private**, otherwise, leave it de-selected.
2. Select a **note type** from the Type list.
3. Enter a note of up to 256 characters in the Note field.
4. Click **OK** when you are finished to save the note. Click **Cancel** if you do not want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

Edit a Note

You can edit notes that are listed in the Notes panel of the Customer Dashboard.

To edit a note:

1. Click the **Edit**  icon at the top of the Notes panel. This displays a Notes for (Customer) screen that lists the notes stored for the selected customer.



Notes for [Customer Name] (ID: 123456789) [X]

Notes Last Updated by 1 on 6/11/18

Actions ▼ + / × ↺

Type	Note	Private	Created By	Created On	Last Updated By	Last Updated On
EVT_SET_AS_PRIMARY	Set as primary account holder: customer card	No	1	6/11/18		
EVT_ASSOCIATE_CARD	Associated customer card	No	1	6/11/18		
EVT_ACTIVATE_CARD	Activated customer card	No	1	6/11/18		

Figure 4-43: Notes for (Customer)

The Notes for (Customer) screen provides the following information and features:

- The title bar displays the Customer Name and ID
- The user that last updated the notes and the date they were last updated is displayed beneath the title bar.
- The toolbar and actions menu provide commands to Add, Edit, and Delete a note

- The notes grid displays the following about each note:
 - Type – the type of note
 - Note – the text of the note
 - Private – indicates whether the note is private (can be seen only by the note's author or system administrators) Yes/No
 - Created By – the ID of the user who created the note
 - Last Updated By – the ID of the user who last updated the note
 - Last Updated On – the date the note was last update
 - The Note list is sorted by the Last Updated On date in descending order, by default. If there is no Last Updated On date, the Created On date is used.
 - If there is more information than can be displayed on the screen, scrollbars are provided to navigate to hidden information.
2. Select the note in the grid that you want to edit, and click the **Edit**  icon, or choose **Edit** from the Actions menu. This displays the note in the Edit Note window:

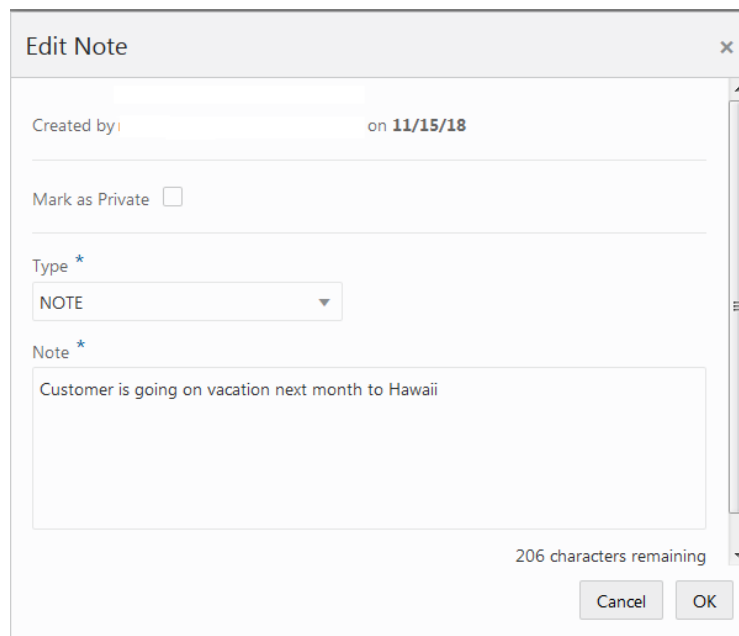


Figure 4-44: Edit Note

3. You can change any of following:
- Mark as Private** – Select the check box to ensure that only the note's author and system administrators can see it, or de-select if you do not want to restrict access.
 - Type** – Select a different type from the list.
 - Note** – Edit the text of the note.
4. When you are finished editing the note, click **OK** to save the changes or click **Cancel** if you do not want to save the changes. Either action returns you to the Notes for (Customer) screen.

Delete a Note

You can delete a note in the Notes for (Customer) screen.

To delete a note:

1. Select the note in the grid that you want to delete, and click the **Delete**  icon, or choose **Delete** from the Actions menu. This displays a Warning message:

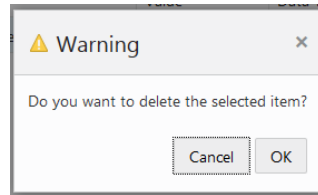
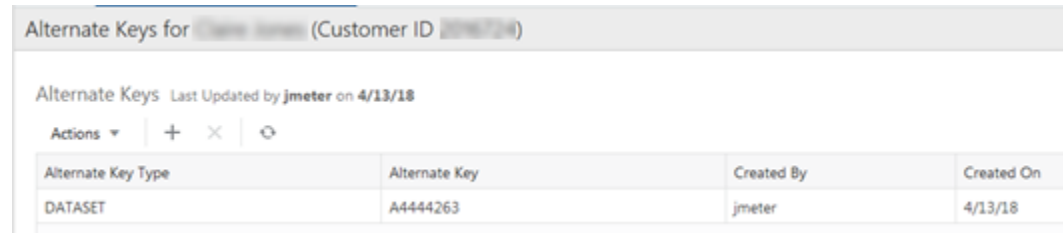


Figure 4-45: Warning

2. Click **OK** to delete the note, or **Cancel**, if you do not want to delete the note.
3. Either action returns you to the Notes for (Customer) screen. If you chose OK, to delete the note, it is no longer displayed in the grid and is removed from the database.
4. Click **Done** in the Notes for (Customer) screen when you are finished. This returns you to the Customer Dashboard.

Alternate Keys

Alternate keys are used to link customer accounts with other systems. Choose the **Alternate Keys** option on the Actions menu in the Customer Dashboard for access to the Alternate Keys page:



Alternate Keys for [Customer Name] (Customer ID [ID])			
Alternate Keys Last Updated by jmeter on 4/13/18			
Actions ▾ + × ↺			
Alternate Key Type	Alternate Key	Created By	Created On
DATASET	A4444263	jmeter	4/13/18

Figure 4-46: Alternate Keys

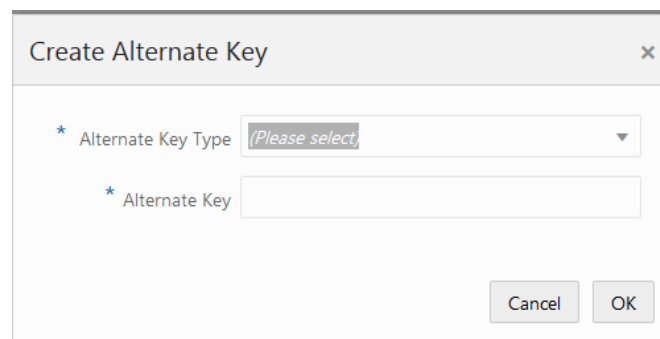
The Alternate Keys screen offers the following information and features:

- The customer name and ID
- The user who last updated the screen and the date it was last updated
- The Actions menu and corresponding icons let you Add and Delete alternate keys.
- Alternate Key Type –The type of the alternate key (these are defined by the customer)
- Alternate Key – The value of the alternate key (the value format is defined by the customer)
- Created By – The user who created the alternate key
- Created On – The date the alternate key was created

Adding an Alternate Key

To add an alternate key:

1. Click the **Actions** menu  in the Customer Dashboard and choose **Alternate Keys**. This displays an Alternate Keys screen listing the customer's alternate keys.
2. Click the **Add** + icon, or choose **Add** from the Actions menu. This displays a Create Alternate Key window.



Create Alternate Key ×

* Alternate Key Type (Please select... ▾)

* Alternate Key

Cancel

OK

Figure 4-47: Create Alternate Key

3. Select an Alternate Key Type from the list.
4. Enter the value of the new alternate key in the Alternate Key field.
5. Click **OK** to save the new alternate key and return to the Alternate Keys screen, or click **Cancel** to return without saving the alternate key.

Deleting an Alternate Key

To delete an alternate key:

1. Select the alternate key that you want to delete.
2. Click the **Delete**  icon, or chose **Delete** from the Actions menu.
3. This displays a Warning message asking you to confirm that you want to delete the alternate key.

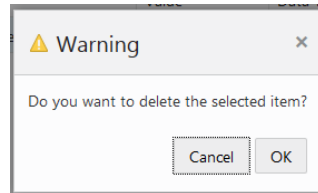


Figure 4-48: Warning

4. Click **OK** to delete the alternate key, or **Cancel**, if you do not want to delete the alternate key.
 5. Either action returns you to the Alternate Keys screen. If you chose OK, to delete the alternate key, it is no longer displayed in the grid and is removed from the database.
- Click **Done** in the Alternate Keys screen when you are finished. This returns you to the Customer Dashboard.

Associate Assignment

The Associate Assignment page lets you add, update, or delete associates assigned to a role for a customer. Choose the **Associate Assignment** option on the Actions  menu in the Customer Dashboard for access to the Associate Assignment page:

Associate Assignments for *Stacy Lindgren (ID: 11487940)*

Assigned Associates: Last Updated by *Stacy Lindgren* on 2/6/19

Actions  

Primary	Role	Associate	Email	Location	Lock
☒	WSDL1-Wedding Planner				
	WSDL2-Reception Coordinator				
	WSDL3-Bridal Dress Consultant			00004-00004-Portland-OR	Unlocked
	WSDL4-Floral Designer				
	WSDL5-Cake Decorator				
	WSDL6-Invitation Specialist				
	WSDL7-Wedding Photographer				
	Dress Fitting				
	Personal Shopper				
	Event Planner			00005-00005-Solon-OH	Unlocked
	Test Role CReation				
	Test Role CReation				

Done

Figure 4-49: Associate Assignment

The Associate Assignment screen offers the following information and features:

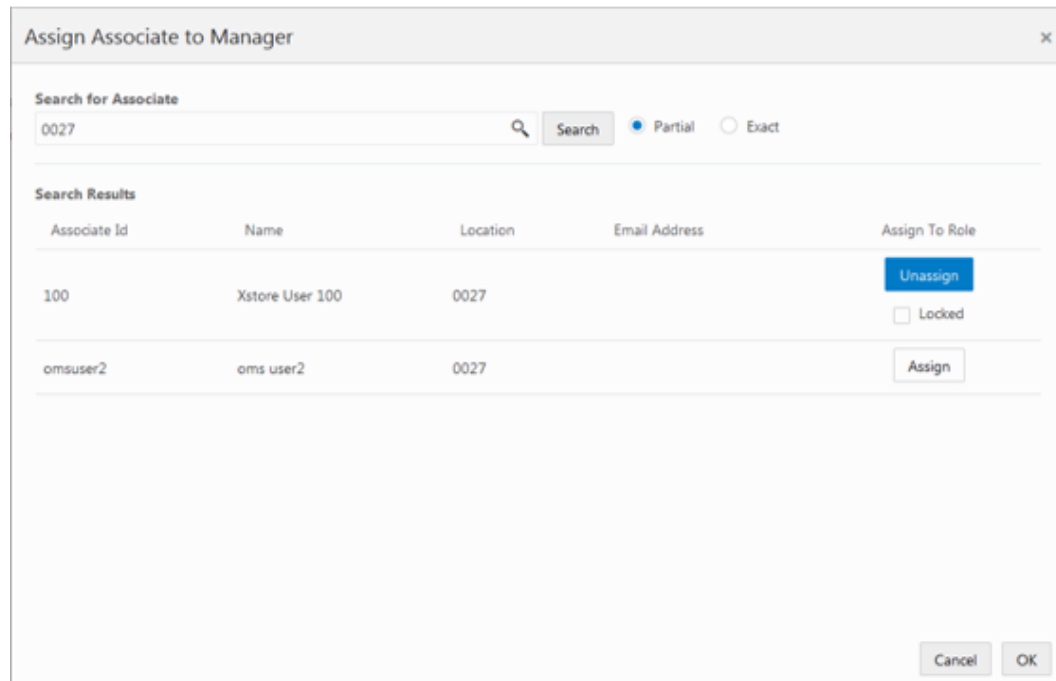
- The customer name and ID
- The user who last updated the screen and the date it was last updated
- The Actions menu and corresponding icons let you Assign and Unassign associates.
- Primary – Indicates the pre-designated Primary role, which is set by the client.

- Role – Associate Role. See the *Oracle Retail Customer Engagement Cloud Service Implementation Guide* for more information about Associate Roles
- Associate – Name of the associate
- Email – The email of the associate
- Location – ID of the associate's location
- Lock – Indicates whether the associate user assignment can be changed (Unlocked) or not changed (Locked).
 - If an associate is not assigned, this field is blank.
 - When the assignment is locked, the logged in user must be the same as the assigned user to edit or unlock the associate user assignment, with the exception of a system administrator. The system administrator can edit any assigned user.
 - If a user without the privileges to change the associate assignment attempts to do so, an error message displays: *The assignment is locked, and can only be changed by the assigned user or a system administrator.*

Assigning an Associate

To assign an associate to a role for a customer:

1. In the Associate Assignment grid, select the role to which you want to assign an associate.
2. From the Action menu, choose **Assign**, or click the **Assign**  icon. This displays the Assign Associate dialog:



The dialog box titled "Assign Associate to Manager" contains a search section and a results table. The search section has a text input "Search for Associate" with the value "0027", a magnifying glass icon, a "Search" button, and radio buttons for "Partial" (selected) and "Exact". Below is a table with the following data:

Associate Id	Name	Location	Email Address	Assign To Role
100	Xstore User 100	0027		Unassign ☐ Locked
omsuser2	oms user2	0027		Assign

At the bottom right are "Cancel" and "OK" buttons.

Figure 4-50: Assign Associate

3. In the **Search for Associate** prompt, enter the ID, Name, Location or Email of the associate you want to assign to the role. Select **Partial** to search on a partial entry, or **Exact**, to search for only exact matches.
4. Click **Search**. This displays the associates matching the search criteria in the Search Results grid.

5. Click **Assign** in the row of the associate that you want to assign to the role. **Assign** changes to **Unassign**, and the Locked check box is displayed:
6. If you want to lock the assignment so that only you and system administrators can change it, select the Locked check box. If not, leave it clear.
7. Click **OK**. This returns you to the Associate Assignments page. The associate added to the role is displayed in the assignment row.

Un-assigning an Associate

To un-assign an associate from a role for customer:

1. In the Associate Assignment grid, select the assignment from which you want to un-assign an associate. Only one assignment can be selected to un-assign at one time.
2. From the Action menu, choose **Unassign**, or click the **Unassign**  icon. This removes the associate from the role, and their information is deleted from the assignment row.

Click **Done** when you are finished with associate assignments. This returns you to the Customer Dashboard

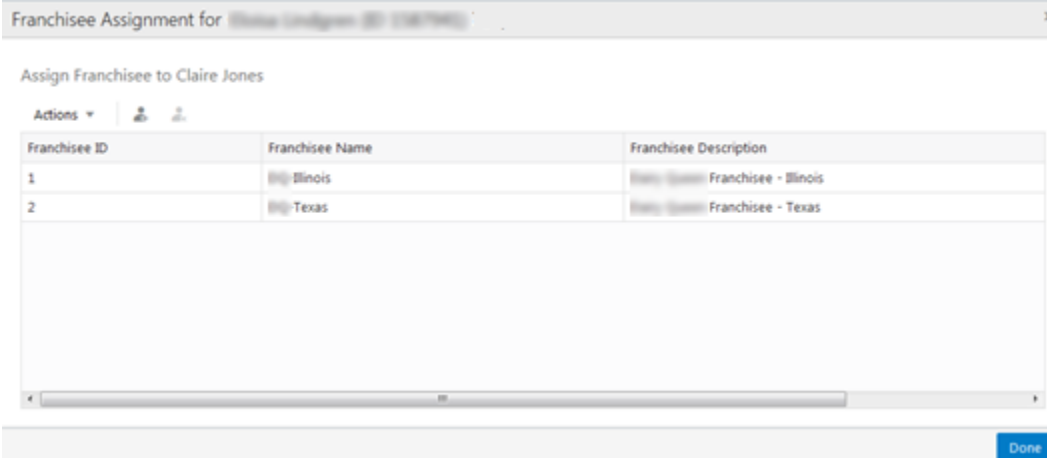
Franchisee Assignment

The Franchisee Assignments page displays information about the franchisees to which the customer has been assigned.

Note: The Franchisee Assignment option is only displayed if the (Franchisee) user has access to more than one Franchisee.

For more information about how franchisees are initially set up and the configuration is enabled, see the *Customer Engagement Cloud Services Implementation Guide*

Choose the **Franchisee Assignment** option on the Actions  menu in the Customer Dashboard for access to the Franchisee Assignment page:



Franchisee Assignment for **Claire Jones** (ID: 123456789) ×

Assign Franchisee to Claire Jones

Actions   

Franchisee ID	Franchisee Name	Franchisee Description
1	 Illinois	 Franchisee - Illinois
2	 Texas	 Franchisee - Texas

Done

Figure 4-51: Franchisee Assignment

The Franchisee Assignment page offers the following information and features:

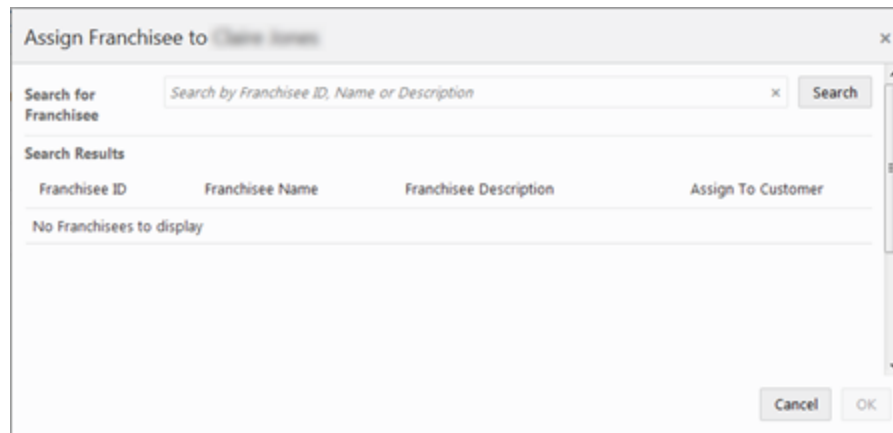
- The customer name and ID
- The user who last updated the screen and the date it was last updated

- The Actions menu and corresponding icons let you Assign and Un-assign franchisees.
- Franchisee ID – ID number of the franchisee
- Franchisee Name – Name of the franchisee
- Franchisee Description – a description of the franchisee

Assigning a Franchisee

To assign a franchisee to a customer:

1. Choose **Assign** from the Actions menu, or click the **Assign**  icon. Either action displays the Assign Franchisee dialog:

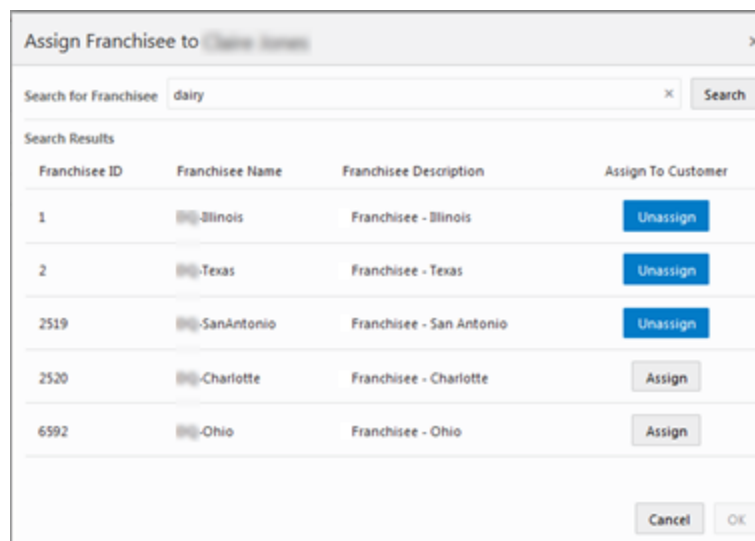


The dialog box is titled "Assign Franchisee to [Customer Name]". It contains a search field labeled "Search for Franchisee" with a placeholder "Search by Franchise ID, Name or Description" and a "Search" button. Below the search field is a table titled "Search Results" with columns: Franchisee ID, Franchisee Name, Franchisee Description, and Assign To Customer. The table currently displays "No Franchisees to display". At the bottom right are "Cancel" and "OK" buttons.

Figure 4-52: Assign Franchisee

2. Enter a full or partial franchisee ID, name or description in the Search for Franchisee field and click **Search**. A list of franchisees matching the search text is displayed in the Search Results grid.

Note: The only franchisees to display are those to which the associate has access.



The dialog box is titled "Assign Franchisee to [Customer Name]". The search field now contains "dairy" and the "Search" button is highlighted. The "Search Results" table now displays five rows of franchisees. Each row has a Franchisee ID, Franchisee Name (with a location icon), Franchisee Description, and an "Assign To Customer" button. The buttons for the first three rows are blue and labeled "Unassign", while the buttons for the last two rows are grey and labeled "Assign". At the bottom right are "Cancel" and "OK" buttons.

Franchisee ID	Franchisee Name	Franchisee Description	Assign To Customer
1	Illinois	Franchisee - Illinois	Unassign
2	Texas	Franchisee - Texas	Unassign
2519	San Antonio	Franchisee - San Antonio	Unassign
2520	Charlotte	Franchisee - Charlotte	Assign
6592	Ohio	Franchisee - Ohio	Assign

Figure 4-53 Assign Franchisees - Results

3. The Search Results list all franchisees that match the search criteria to which the associate has access. If the franchisee is already assigned to the customer, **Unassign** is enabled. If the franchisee is not assigned, **Assign** is enabled. In the row of the franchisee that you want to assign, click **Assign**.
 - To assign a franchisee, click **Assign**.
 - To unassign a franchisee, click **Unassign**.
4. Click **OK** to accept the assignment or **Cancel** to cancel. Either action returns you to the Franchisee Assignment page. If you click **OK**, the new franchisee assignment displays in the grid.

Un-assigning a Franchisee

To un-assign a franchisee:

1. In the Assign Franchisee grid, select the franchisee that you want to un-assign from the customer.

Note: Only one franchisee can be selected to un-assign at a time.

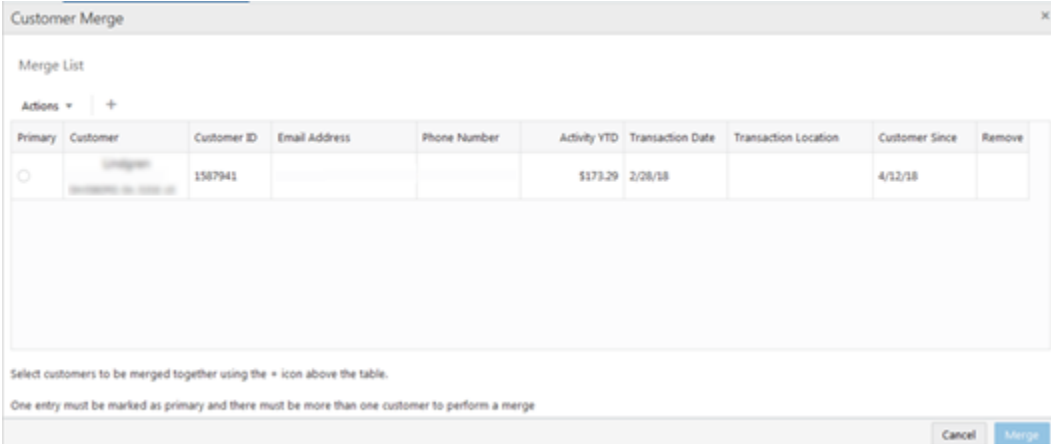
2. Choose **Unassign** from the Actions menu, or click the **Unassign**  icon. Either action un-assigns the franchisee from the customer and deletes the franchisee from the grid.

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.

To merge customer records:

From the Actions  menu in the Customer Dashboard, choose **Merge**. This displays the Customer Merge screen:



Primary	Customer	Customer ID	Email Address	Phone Number	Activity YTD	Transaction Date	Transaction Location	Customer Since	Remove
☐	Unassigned	1587941			\$173.29	2/28/18		4/12/18	

Figure 4-54: Customer Merge

The Customer Merge page offers the following information and features:

- The Actions menu and corresponding icon lets you Add Customers to Merge
- Primary – when selected, indicates the primary customer.
- Customer – The customer name and address

- Customer ID
- Email Address – The customer email address
- Phone Number – The customer phone number
- Activity YTD – The amount of the customer’s transactions for the year to date
- Transaction Date – The date of the last transaction
- Transaction Location – The location of the last transaction
- Customer Since – The customer creation date
- Remove – Click to remove a customer from the list.

Merging Customers

Step 1: add customers to merge:

1. In the Customer Merge page, click the Actions menu and choose **Add Customers to Merge**, or click the **Add Customers to Merge** ⁺ icon. Either action displays the Add Customers to Merge dialog:

Figure 4-55: Add Customers to Merge

2. In the **Search for Customer** prompt, enter the Name, Email, Phone, ID, or Alternate Key of the customer you want to add to the Merge list. Select **Partial** to search on a partial entry, or **Exact**, to search for only exact matches.
3. Click **Search**. This displays the customers matching the search criteria in the Search Results grid:

Customer	Contact Info	Activity YTD	Customer Since	Add To List
Wally Nelson (ID 130398) Wally Nelson 10000 US	wally.nelson@oracle.com	\$0.00 Last Transaction Date 4/3/18	2/11/18	Add
Wally Nelson (ID 130398) Wally Nelson 10000 US	wally.nelson@oracle.com	\$0.00 Last Transaction Date 4/24/16	2/11/18	Add
Wally Nelson (ID 130544) Wally Nelson 10000 US	wally.nelson@oracle.com	\$0.00 Last Transaction Date 12/25/17	2/11/18	Add
Wally Nelson (ID 130398) Wally Nelson 10000 US	wally.nelson@oracle.com	\$0.00 Last Transaction Date 3/20/16	2/11/18	Add
Wally Nelson (ID 130398) Wally Nelson 10000	wally.nelson@oracle.com	\$8.19 Last Transaction Date 7/16/18	2/11/18	Add

Figure 4-56: Add Customers to Merge Results

The grid displays the following information for each customer:

- Customer – the customer name, ID, and primary address.
 - Contact Info – the customer email address and phone number
 - Activity YTD - The amount of the customer's transactions for the year to date, and the date of the last transaction.
 - Customer Since – the creation date of the customer.
4. Click **Add** in the Customer row if you want to add the customer to the Customer Merge list. **Add** is replaced with **Remove**, which you can use to remove the customer.

Note: You can only merge up to five customers at one time.

5. Click **OK**. This returns you to the Customer Merge page with the customers added to the Merge List.

Step 2: Merge Customers

1. In the Customer Merge page, review the Merge List and click **Remove** to remove any customers you do not want to merge.
2. Click **Primary** in the row of the customer that you want as the primary customer.
3. Click **Merge** to display a confirmation prompt:

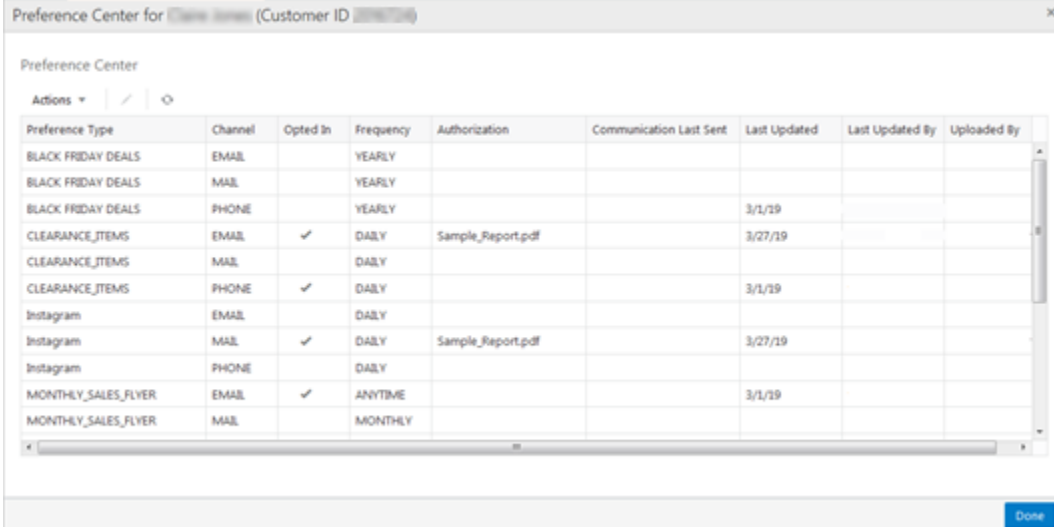
Figure 5-57: Confirmation

4. To merge the customer records, click **Yes**. To exit without merging the customers, either click **No** or **X**.

Preference Center

The Preference Center page displays the contact preferences for a customer. For more information about how Preference Center channels are initially set up and the configuration is enabled, see the *Oracle Retail Customer Engagement Cloud Service Implementation Guide*.

Choose the **Preference Center** option on the Actions  menu in the Customer Dashboard for access to the Preference Center page:



Preference Type	Channel	Opted In	Frequency	Authorization	Communication Last Sent	Last Updated	Last Updated By	Uploaded By
BLACK FRIDAY DEALS	EMAIL		YEARLY					
BLACK FRIDAY DEALS	MAIL		YEARLY					
BLACK FRIDAY DEALS	PHONE		YEARLY			3/1/19		
CLEARANCE_ITEMS	EMAIL	✓	DAILY	Sample_Report.pdf		3/27/19		
CLEARANCE_ITEMS	MAIL		DAILY					
CLEARANCE_ITEMS	PHONE	✓	DAILY			3/1/19		
Instagram	EMAIL		DAILY					
Instagram	MAIL	✓	DAILY	Sample_Report.pdf		3/27/19		
Instagram	PHONE		DAILY					
MONTHLY_SALES_FLYER	EMAIL	✓	ANYTIME			3/1/19		
MONTHLY_SALES_FLYER	MAIL		MONTHLY					

Figure 4-58 Preference Center

The Preference Center page offers the following information and features:

- The customer name and ID
- The Actions menu and corresponding icons let you Edit a preference.
- Preference Type – Name of the preference center. This is displayed for all the channels in a preference center.
- Channel –The communication channel
- Opted In – Indicates whether the customer has opted to be contacted through the channel. If there is a check mark in the field, then the customer will be contacted through the channel.
- Frequency – The frequency at which the customer will be contacted through the channel
- Authorization – Name of the file in which the customer authorized communication
- Communication Last Sent – Date the communication was last sent to the customer
- Last Updated – Date and time the channel preferences for this customer were last updated
- Last Updated By – ID of the user who last updated the channel preferences for this customer.
- Uploaded By – User who last updated the image/file. This will be populated by the logged in user who uploads the latest file on the preference.

Working with Preference Types

You can refresh, **sort**, **view**, **add**, **edit** and **delete** preference types, so that you can setup unlimited preference types to use with the Customer Preference Center. To access Preference Types:

1. Click the **Tasks** icon.
2. Click the **Admin** Task.
3. Click the **Preference Types** Task.

Preference Types

Actions ▾	+		✕	↺	Sort By Preference Type ID ▾	Descending ▾
Preference Type ID	Preference Type Name	Default Frequency				
101	Security Alerts	BOO!				
97	Summer Sales	MONTHLY				
96	insta	FORTNIGHTLY				
94	hike	YEARLY				
92	dusehra deals	MONTHLY				

Figure 4-59: Preference Types

Sorting Preference Types

You can sort by:

- Default Frequency
- Preference Type ID
- Preference Type Name

Preference types can be sorted ascending or descending from the list.

Adding a Preference Type

Click the **Actions** menu or the **Add** icon to open the Create Preference Type window.

Create Preference Type

* Preference Type Name

* Default Frequency (Please select)

Cancel OK

Figure 4-60: Create Preference Type

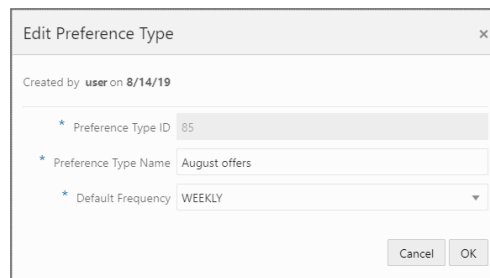
Type a **Preference Type Name** and choose **one** of the following default frequencies.

- Anytime
- Weekly
- Monthly
- Yearly
- Daily
- Fortnightly
- Quarterly

Click **OK** to add the new Preference Type. Or click Cancel to close the window.

Editing a Preference Type

Highlight the row of the **Preference Type** you want to edit and click the Actions menu or the Edit icon to open the Edit Preference Type window.



The 'Edit Preference Type' dialog box shows the following details:

- Created by: user on 8/14/19
- Preference Type ID: 85
- Preference Type Name: August offers
- Default Frequency: WEEKLY

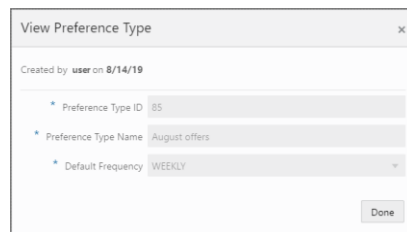
Buttons: Cancel, OK

Figure 4-61: Edit Preference Type

Edit the Preference Type Name or select a different Default Frequency and click OK. Or Click cancel to close the window and discard any changes.

Viewing a Preference Type

Highlight the row of the **Preference Type** you want to view and click the Actions menu or the View icon to open the View Preference Type window.



The 'View Preference Type' dialog box shows the following details:

- Created by: user on 8/14/19
- Preference Type ID: 85
- Preference Type Name: August offers
- Default Frequency: WEEKLY

Button: Done

Figure 4-62: View Preference Type

View the details of the Preference Type and click **Done** to close the window.

Delete a Preference Type

Highlight the row of the **Preference Type** you want to delete and click the Actions menu or the Delete icon to open the delete confirmation window. Click OK to delete the Preference Type or Cancel to close the window without deleting the row.

Editing a Preference

To edit a preference:

1. In the Preference Center grid, select the preference that you want to edit.
2. From the Actions menu, choose **Edit**, or click the **Edit**  icon. This displays the Edit Preference dialog:

Edit Preferences for BLACK FRIDAY DEALS via PHONE

Last Updated by [tom.a.bond@oracle.com](#) on 3/1/19

Opt In to BLACK FRIDAY DEALS via PHONE ☐

Frequency: YEARLY

Communication Last Sent

Authorization File
 Drop file here or click to upload

Cancel OK

Figure 4-63: Edit Preferences

3. Edit the fields that you want to change:

Opt In to – Click to the on position to indicate that the customer accepts communication from this channel, or click off, to indicate the customer does not want communication.

Frequency – Select the frequency with which the customer receives communication from this channel.

Communication Last Sent – Click the date in the calendar on which communication from the channel was last sent.

Authorization File – Drag and drop a file authorizing the communication, or click in the field to search for a file to upload.

4. Click **OK**. This returns you to the Preference Center page.

Tasks

The Tasks page displays the tasks that are associated with the customer. Choose the

Tasks option on the Actions menu in the Customer Dashboard for access to the Tasks page:

Customer Tasks for [Tom Bond](#) (Customer ID [22861200](#))

Tasks: Last Updated by [@oracle.com](#) on 5/14/19

Search for a task or task note by a term

Actions

Task Type	Task Name	Start Date	End Date	Status	Assigned To
APPOINTMENT	Meeting	5/14/19	5/14/19	OPEN	Tom
TASK	This should also show	5/9/19	5/9/19	OPEN	Tom
APPOINTMENT	This should show!	5/9/19	5/9/19	OPEN	Tom
APPOINTMENT	test	5/15/19	5/15/19	OPEN	
APPOINTMENT	Meeting	4/29/19	4/29/19	OPEN	
APPOINTMENT	Meeting	4/29/19	4/29/19	OPEN	
APPOINTMENT	Meeting with Client	4/29/19	4/30/19	OPEN	
EVENT	Sweater Promo	1/9/19	1/9/19	OPEN	
TODD	to do	11/16/18	11/18/18	IN_PROGRESS	
EVENT	Event	11/13/18	11/14/18	OPEN	

Done

Figure 4-64: Customer Tasks

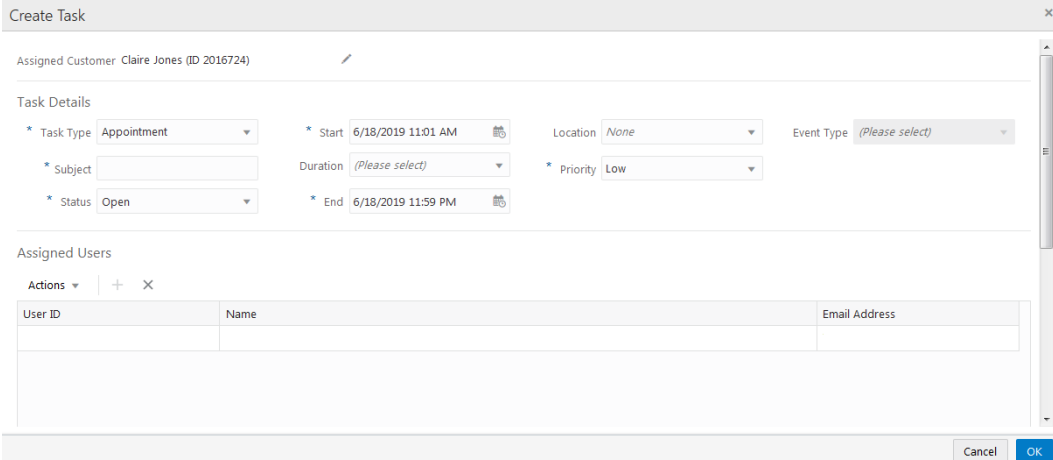
The Tasks page offers the following information and features:

- The customer name and ID
- The user who last updated the screen and the date it was last updated
- The Search panel lets you search for a task by entered text
- The Actions menu and corresponding icons let you Add, Edit, and View a task
- Task Type – The type of task. These are configured by the customer. See the *Oracle Retail Customer Engagement Cloud Services Implementation Guide* for information about configuring custom Task types
- Task Name – A name for the task that was entered by the user who created the task
- Start Date – The start date of the task
- End Date – The end date of the task
- Status – The selected status of the task
- Assigned to – The associate to whom the task is assigned

Adding a Task

To add a task:

1. Choose **Add** from the Actions menu, or click the **Add**  icon. This displays the Create Task screen:



Create Task

Assigned Customer: Claire Jones (ID 2016724) 

Task Details

* Task Type: Appointment

* Start: 6/18/2019 11:01 AM 

Location: None

Event Type: (Please select)

* Subject:

Duration: (Please select)

* Priority: Low

* Status: Open

* End: 6/18/2019 11:59 PM 

Assigned Users

Actions:  + X

User ID	Name	Email Address

Cancel OK

Figure 4-65: Create Task

2. If you want to change the customer assigned to the task, click the **Edit**  icon next to the Assigned Customer Name and ID. This displays the Edit Assigned Customer window:

Edit Assigned Customer [X]

Search for Customer

Search by name, email, phone, customer ID or alternate key [Search] ☒ Partial ☐ Exact

Search Results

Name	Email Address	Phone Number	Customer ID	Alternate Key	Assign To Task
No customers to display.					

[Cancel] [OK]

Figure 4-66: Edit Assigned Customer

- a. In the Search for Customer field, enter the name, email, phone, customer ID or alternate key of the customer you want to search for. Select **Partial** to search for customers that partially match the search text, or **Exact**, to search for an exact match.
 - b. Click **Search**. This displays the list of matching customers under Search Results.
 - c. Select the customer in the list that you want to assign to the task and click **OK**, or click **Cancel** if you do not want to change the customer assignment. This returns you to the Create Task screen. If you click **OK**, the Customer Name and ID for the selected customer precede the Task Details.
3. Enter the details for the new task. Mandatory fields are indicated with asterisks (*):
 - Task Type – Select a task type from the list. This list is determined by the customer.
 - Subject – Enter a subject. This will appear in the Task Name field.
 - Status – Select a status from among those on list:
 - Open – Set the status of your task to Open.
 - In Progress – Set the status of your task to In Progress
 - Cancelled – Set the status of your task to Cancelled.
 - Closed – Set the status of your task to Closed.
 - Start – Select a start date for the task from the calendar.
 - Duration – Select the duration of the task from the list (optional). Selecting one of the duration options will determine the value for the End Date/Time based on the option chosen.
 - End – If no selection was made in the Duration field, select an end date for the task using the calendar.
 - Location – Select a location from the list.

- **Priority** – Select a priority level from the list. These are configured by the customer. See the *Customer Engagement Cloud Services Implementation Guide* for information about configuring custom Task Priority Codes.
 - **Event Type** – If you selected Event as the Task Type, select an Event Type from the list. For all other task types, this field is disabled.
4. Under **Assigned Users**, assign a user to the task. This defaults to the current logged-in user.
 - If you want to remove the current user, select the user and choose **Remove** from the Actions menu, or click the **Remove** ✕ icon. This clears the user from the grid.

Note: If no user is assigned to the task, and you click OK in this screen, a Confirmation prompt is displayed:

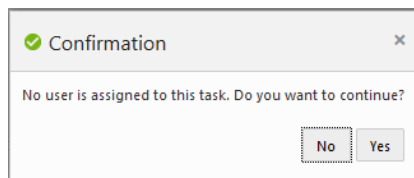


Figure 6-67: Confirmation

- * Click **No** if you want to return to the Create Task screen.
 - * Click **Yes** if you want to create the task without a user assigned.
- If you want to add a user, remove the current user (see previous) and choose **Add** from the Actions menu, or click the **Add** icon. This displays an Add User to Task dialog:

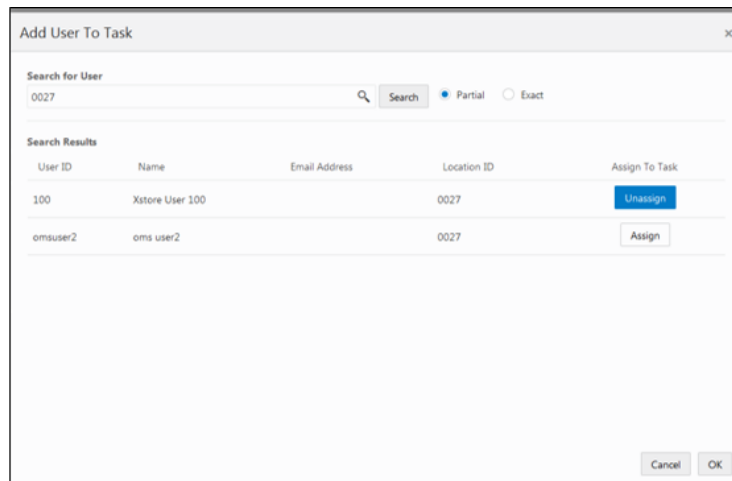
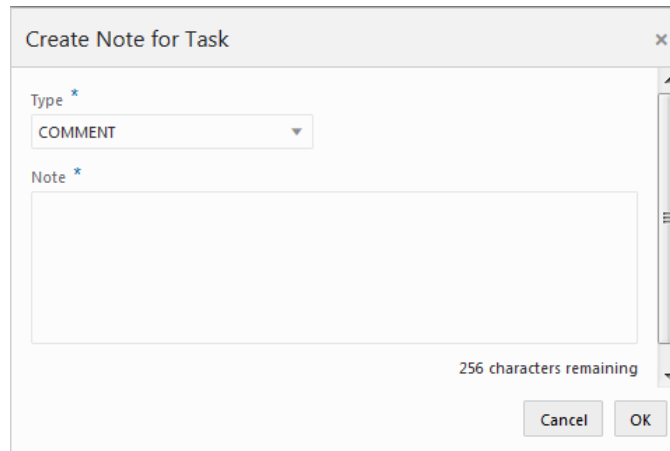


Figure 4-68: Add User to Task – Search Results

5. In the Add User to Task Search field, enter the user ID, name, email address or location. Select **Partial**, to search a partial entry, or **Exact**, to search for only exact matches.
6. In the Search Results list, select the user you want to add to the task, and click **Assign**, then click **OK**. This returns you to the Create Task screen.
7. If you want to add a note with more information about the task, in the Task Notes panel, choose **Add** from the Actions menu, or click the **Add** + icon. This displays a Create Note for Task window:



The 'Create Note for Task' dialog box features a title bar with a close button. It contains a 'Type' dropdown menu currently set to 'COMMENT', a 'Note' text area, and a character count '256 characters remaining'. At the bottom are 'Cancel' and 'OK' buttons.

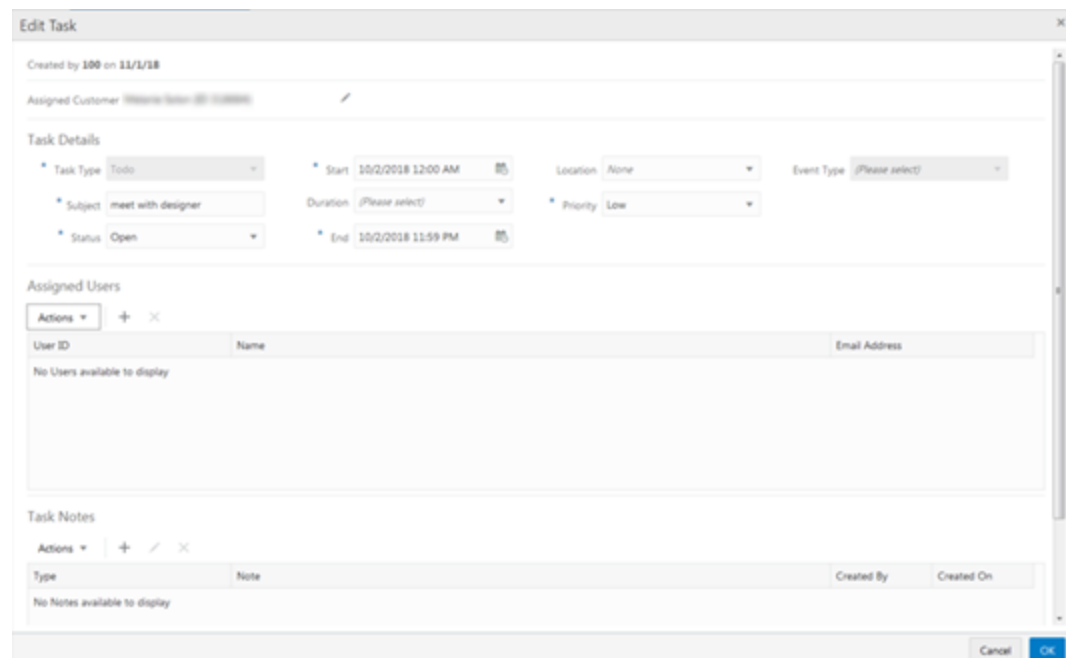
Figure 4-69: Create Note for Task

- a. Select a note type from the Type list.
 - b. Enter a note of up to 256 characters in the Note box.
 - c. Click **OK**. This returns you to the Create Task screen.
8. Click **OK**. This returns you to the Tasks page. The new task is displayed in the grid.

Editing a Task

To edit a task:

1. In the Tasks List, in the Customer Tasks screen (see [Figure 4-64](#)), select the task that you want to edit.
2. Choose **Edit** from the Actions menu, or click the **Edit**  icon. This displays the task in the Edit Task screen:



The 'Edit Task' screen displays task information and editing options. At the top, it shows 'Created by 100 on 11/1/18' and 'Assigned Customer Wilson, John (01-100000)'. The 'Task Details' section includes fields for Task Type (Todo), Start (10/2/2018 12:00 AM), Location (None), Event Type (Please select), Subject (meet with designer), Duration (Please select), Priority (Low), Status (Open), and End (10/2/2018 11:59 PM). The 'Assigned Users' section has an 'Actions' dropdown and a table with columns 'User ID', 'Name', and 'Email Address', currently showing 'No Users available to display'. The 'Task Notes' section also has an 'Actions' dropdown and a table with columns 'Type', 'Note', 'Created By', and 'Created On', currently showing 'No Notes available to display'. At the bottom right are 'Cancel' and 'OK' buttons.

Figure 4-70: Edit Task

- The user who created the task and the date it was created are displayed at the top of the screen.

- The Assigned Customer Name and ID precede the Task Details. You can change the assigned customer.
 - The Task Type and Event Type fields are not editable.
3. If you want to change the customer assigned to the task, click the **Edit**  icon next to the Assigned Customer Name and ID. This displays the Edit Assigned Customer window. See [Adding a Task](#) for more information on editing the assigned customer.
 4. Modify what you want to change in the Task Details, Assigned Users, and Task Notes panels. See [Adding a Task](#) for more information on entering information in these fields.
 5. Click **OK** to return to the Customer Tasks page. Or, click **Cancel** to return to the Customer Tasks page without saving any of your changes.

If you clicked OK to save the changes, the Update User and Update Date are updated to that of the logged-in user and the date/time the changes were saved and displayed at the top of the Customer Tasks screen.

Viewing a Task

To view a task:

1. In the Tasks List, in the Customer Tasks screen (see [Figure 4-64](#)) select the task that you want to view.
2. Choose **View** from the Actions menu, or click the **View** icon. This displays the task details in view-only mode in the View Task screen.
3. Review the task details. See [Adding a Task](#) for more information on the task details in these fields.
4. Click **Done** when you are finished reviewing the task details. This returns you to the Tasks page.

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 a 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 Search](#)
- [Viewing a Promotion](#)
- [Creating a Coupon Promotion](#)
 - [Edit Existing Coupons](#)
 - [Creating Additional Coupons](#)
- [Creating a Product Promotion](#)
- [Creating a Message Promotion](#)
- [Creating an Award Promotion](#)
- [Promotion Actions](#)
- [Editing a Promotion](#)
- [Duplicating a Promotion](#)
- [Promotion Scorecard](#)

Promotion Search

To search for a promotion use the following steps:

1. Click the **Menu** icon.
2. Click the **Campaign Task**.
3. Click the **Promotion Search Task**.

Promotion Search

Search

Promotion ID

Campaign
All

Status
All

Type
All

Exported
All

Attribute Type
All

Attribute Value

Franchisee ID
All

Coupon Code
Coupon Code

Reset Search

473 Promotions Found Sort By Last Update Date

Create Promotion

	Promotion Name and Campaign Name	Type	Start Date	End Date	Offers	Status
☐	February Specials (ID 912) February Specials	Coupon	3/10/20	3/11/20	2	Approved
☐	Message Promotion for All location (ID 911) Message Promotion for All location	Message	3/10/20	3/11/20	0	Approved
☐	Promo 213 (ID 910) Award Promotion Date 9-3-2020	Product	3/10/20	3/31/20	2	Approved
☐	Award Promotion Date 9-3-2020 (ID 909) Award Promotion Date 9-3-2020	Award	3/10/20	3/31/20	0	Saved
☐	Similar Award (ID 908) Similar Award	Award	3/10/20	3/26/20	0	Saved
☐	Xstore Offer Export Testing (ID 791) Xstore Offer Export Testing	Product	2/19/20	3/6/20	8	Terminated
☐	TargetSegmentExport (ID 847) TargetSegmentExport	Product	2/27/20	3/6/20	1	Terminated
☐	GWT Message Promotion (ID 907) GWT Message Promotion	Message	3/7/20	3/8/20	0	Approved
☐	JET Message Promotion (ID 906) Message Promotion	Message	3/7/20	3/8/20	0	Approved
☐	Coupon Promotion with Serialization (ID 903) Coupon Promotion with Serialization	Coupon	3/6/20	3/27/20	1	Saved

Show More... 1-25 of 473 items

Figure 5-1: Promotion Search

- Enter any or all of the following information to conduct a search. The Search pane contains the following filters:
 - Promotion ID** – Returns the exact ID match of the Promotion. No partial IDs or wildcards may be used.
 - Campaign** – Filters the list by the name of the Promotion. The default filter is all.
 - 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
 - Approved** - Display only Approved Promotions.
 - Clear** - Display only Promotions that have been cleared.
 - Conflict** - Display only Promotions with conflicts.
 - Saved** - Display only Saved Promotions.
 - Terminated** - Display only Terminated Promotions.
 - 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.
 - Award** - Display only Award Promotions.
 - Coupon** - Display only Coupon Promotions.
 - Message** - Display only Message Promotions.
 - Product** - Display only Product Promotions.
 - 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** – The type of attribute.
 - Attribute Value** – This is a dynamic field based on the attribute previously entered.

- **Franchisee ID** – This Text Field searches for Promotions by the Franchisee associated with the Promotion. The Franchisee ID criteria is only visible if the EnableFranchiseSupport configuration is enabled. Only Franchisees associated with the user will be displayed. This will default to All.
 - **Coupon Code** – Coupon code associated with the Promotion.
 - **Created By** – List Box with list of associates who created available Promotions. This will default to Everyone.
5. Click **Search**.

Note: **Reset** clears all fields and returns the list values to the default selections.

Promotion Name and Campaign Name	Type	Start Date	End Date	Offers	Status	Exported	Revenue LTD
Fall Promotion (ID 592) Fall Promotion	Product	11/8/19	11/30/20	1	Conflict	No	\$0.00
Easter Hunt (ID 549) Easter Hunt	Coupon	3/22/19	11/1/19	2	Saved	No	\$0.00
Promo for Deal 6756 (ID 545) Promo for Deal 6756	Product	3/19/19	5/23/20	1	Clear	Yes	\$0.00
Product Promotion (ID 590) Product Promotion	Product	11/7/19	1/31/20	7	Saved	Yes	\$0.00
1106 Promo (ID 591) 1106 Campaign	Product	1/8/20	4/23/20	2	Saved	No	\$0.00

150 Promotions Found Sort By: Last Update Date [Create Promotion](#)

[Show More...](#) 1-25 of 150 items

Figure 5-2: Promotion Search Results

Working with Promotion Results

The results will indicate the number of promotions found displayed in a table. Fields include:

- **Promotion Name and Campaign Name** – The promotion and campaign name. Click on the name to view the [Promotion Scorecard](#) for the promotion.
- **Type** – The type of promotion.
- **Start Date** – The start date of the promotion.
- **End Date** – The end date of the promotion.
- **Offers** – The number of offers associated with the promotion.
- **Status** – The status of the promotion.
- **Exported** – Whether or not the promotion was exported.
- **Revenue LTD** – Revenue Lifetime to Date (LTD) of the promotion.

You can sort by:

- Last Update Date
- Promotion Name
- Promotion ID
- Campaign Name
- Type
- Status
- Exported
- Revenue LTD

Promotion results can be sorted ascending or descending.

Note: The results pane shows the first 25 results. Click the **Show More...** link to see the next 25 results.

Viewing a Promotion

Type	Start Date	End Date	Offers	Status	Exported	Revenue LTD	
Product	11/27/19	11/30/19	1	Saved	No	\$0.00	⋮ ⬆
Product	11/28/19	12/31/19	1	Saved	No	\$0.00	⋮ ⬆

Edit
View

Figure 5-3: Overflow Menu

There are three places that a user can find the View option in order to view a Promotion:

- Select **View** under the Action Menu (also known as the Overflow Menu) icon for each individual Promotion on the Promotion Advanced Search screen.
- Select **View** in the Overflow Menu on each individual Promotion on the Promotion List screen (which displays in the Promotion Home menu).
- Select **View** in the Overflow Menu for the individual Promotion on the Promotion Scorecard.

The View Promotion window displays.

View Promotion (ID 602) ×

Promotion Name	Description	Campaign Name	Timeframe	
winter promotion	winter promo	winter promotion	11/14/19 12:00 AM - 11/27/19 12:00 AM	Product
Status	Create Date	Create User ID	Update Date	Update User ID
Saved	11/13/19	sc.themomath.p@oracle.com	11/13/19	sc.themomath.p@oracle.com

2 Locations

Included
All Locations

That Match ALL Attributes
Location ID: 23902

Or

That Match ALL Attributes
Location ID: 24204

Or

That Match ALL Attributes
All Locations With Attribute:

3 Franchisees

Franchisee Name

Illinois (ID 1)

Texas (ID 2)

WSDL14516

5 Attributes

Figure 5-4: View Promotion

The information displayed will depend upon the configuration for a Promotion.

- Display Bar
 - Promotion Name
 - Description
 - Campaign Name

- Timeframe
- Promotion Type
- Status
- Create Date
- Create User ID
- Update Date
- Update User ID
- Cards – In the Review panel, the individual sections are called "Cards", which display details added to some of the tabs during Promotion setup. Some of those cards may be:
 - Locations
 - Attributes
 - Franchisees
 - Offers
 - Audience
 - Budget

Note: At any time click the Pencil icon to go into the edit mode, see [Editing a Promotion](#) for more information. You can also click the X icon to close the promotion.

Creating a Coupon Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

Note: You will need the Promotion Home role to access the Promotion Home screen.

1. Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Create Promotion

1 Information 2 Franchisees 3 Locations 4 Offers 5 Attributes 6 Coupons 7 Budget 8 Save Options

Promotion Definition

Promotion Type

- Coupon**
Utilizes embedded coupons placed in various media, such as magazines or newspapers
☐ Coupon Serialization
- Product**
Receive monetary savings in exchange for the purchase of specific merchandise
- Message**
Send out communications not specifically associated with any offers
- Award**
Award entitlement coupons or e-awards

Campaign

- ☒ Auto-create campaign
- ☐ Associate this promotion with an existing campaign
- ☐ Create a new campaign for this promotion

Promotion Information

* Name

* Description

* Start Date 02/22/20 12:00 AM

* End Date M/d/yy h:mm a

Promotion Information

Information
No information entered

Franchisees
All Franchisees defined

Locations
All Locations Included

Offers
No offers defined

Attributes
No promotion attributes defined
No promo-offer attributes defined

Coupons
No coupon codes defined

Budget
No budget details defined

Save Options
No save options to display

Next >

Figure 5-5: Information Tab

2. Select the **Promotion Type: Coupon**

Note: Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. There are two options for a Coupon Promotion - Serialized and Non-Serialized. The selection you make will display different options on the Coupon tab. A Serialized Coupon promotion will generate coupons, each with a unique serial number, generally for a one-time use. A Non-Serialized Coupon promotion will generate a unique coupon code for the promotion, for example, a SHOE20 may represent a code a customer can use, multiple times, to receive 20% off a shoe purchase. If you wish to create a Serialized Coupon promotion, use the Coupon Serialization switch in the Coupon type box to activate that option. This Switch is only available if the Serialized Coupon Enabled Flag configuration is set to **Yes**. See the *Oracle Retail Customer Engagement Cloud Service Implementation Guide* for more information about the Serialized Coupon Enabled Flag configuration.
4. Select one of the choices for the **Campaign**.
- **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
 - **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
 - Click the list arrow and select an **existing campaign**.

Note: The Start Date and End Date display underneath the Existing Campaign list.

- **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.
5. Enter the following information:
 - Enter a **Campaign Name** (for new Campaigns only).
 - Enter a **Description** (for new Campaigns only).
 - Enter a **Name**.
 - Enter a **Description**.
 - Select a **Start Date**.
 - Select an **End Date**.
 6. When finished entering the Campaign and Promotion information, click **Next** to continue to the **Franchisees** tab.

Note: This tab will only display if the EnableFranchiseSupport configuration is enabled, and Franchisees have been created.

7. By default, all franchisees are assigned to the promotion. To make changes to those assignments, do the following:

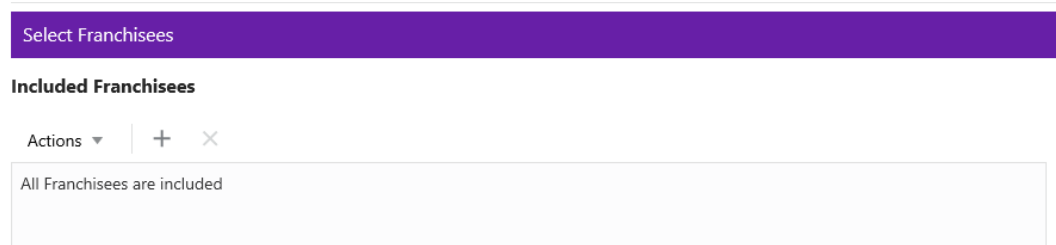


Figure 5-6: Franchisee Tab

- Assigning a Franchisee
 - Click the **Actions** Menu, then, click **Assign**, or click the **Add (+)** icon. This opens the Add Franchisee window.

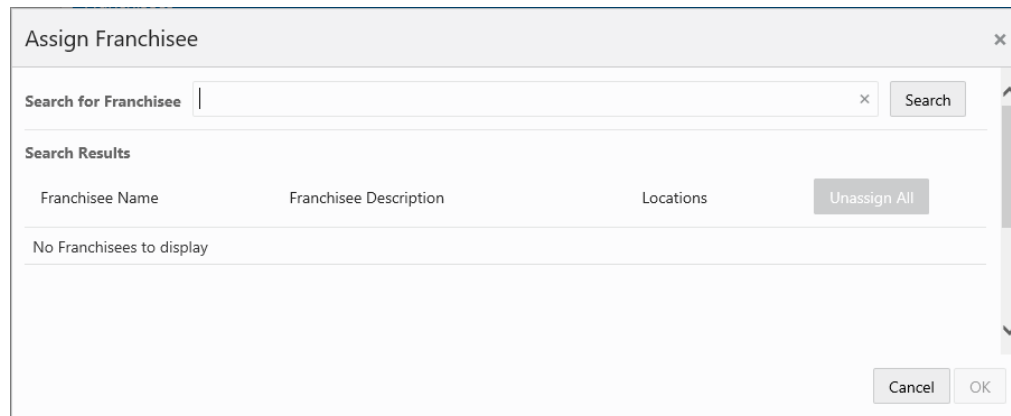


Figure 5-7: Assign Franchisee

- In the Search for franchisee search box, enter part or all of the **Name**, **ID**, or **Description**, then click **Search**.

Note: You can also leave blank and click **Search** to return all Franchisees.

- To change the assignment from ALL (which is defaulted) click **Assign** on just the specific franchisees you wish to assign for this promotion. Only Franchisees associated with the user will be displayed in the list.
- Click **OK** to accept the changes or **Cancel** to close the window without saving.

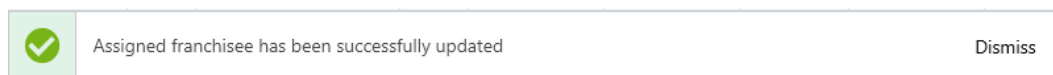


Figure 5-8: Confirmation Notification

Note: A confirmation notification appears to confirm the franchisee has been assigned.

- Deleting A Franchisee
 - In the included Franchisees window, **highlight** the desired row.
 - Click the **Action** Menu, and click **Delete**, or click the **X** icon.

Note: A confirmation notification appears to confirm the franchisee has been deleted.

- When finished entering the Franchisees information, click **Next** to continue to the **Locations** tab.
- Enter the following for the **Locations** tab:

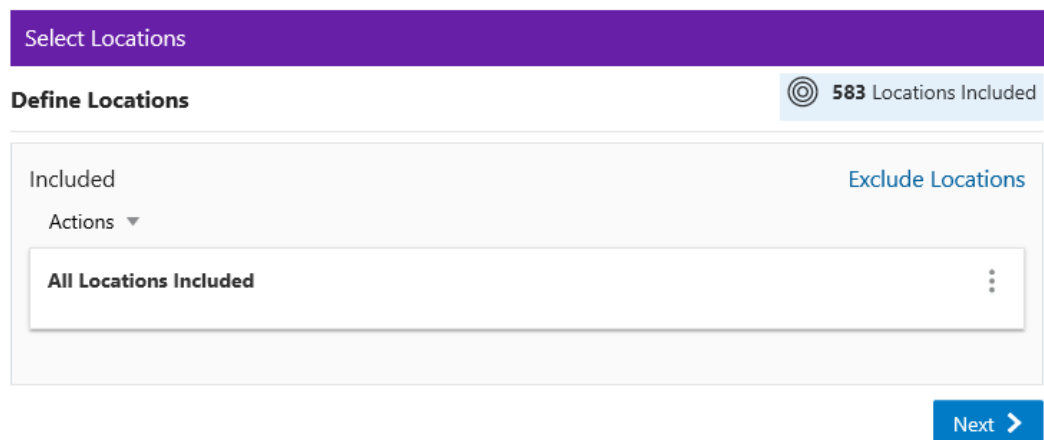


Figure 5-9: Locations Tab

- Define Locations

Note: By default, **ALL** locations are added to the promotion. You can select the Overflow Menu to edit the list of locations to include.

 - Included
 - * If you wish to change the Locations assigned to this Promotion, click the **Overflow Menu**, then click **Edit**. This opens the Edit Location Rule window.

Edit Location Rule (Include)

☒ Specific Locations ☐ Include By Attributes

0 Locations Selected

Search by Location ID or Name

Location ID	Location Name
No locations to display	

Figure 5-10: Edit Location Rule (Include)

- * Specific Locations
 - o Click the **Specific Location** option.

Edit Location Rule (Include)

☒ Specific Locations ☐ Include By Attributes

3 Locations Selected

Search by Location ID or Name

Location ID	Location Name
☒ 2420A	2420A-SouthState-OH
☒ 00002	Franchisee 2 Location

Figure 5-11: Edit Location Rule (Include) – Specific Locations

Note: The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

- o Enter part or all of a **Location ID** or **Name**.
- o Click **Search**.
 - Click **Add** to select a location.
 - Click **Add** for another location means you are using the condition **AND**. Both conditions must be met.
 - Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another location.
 - Click **Ok** to close the window, or click **Cancel** to close the window without saving.

- Include by Attributes
 - Click the **Include by Attributes** option.

The screenshot shows a dialog box titled "Edit Location Rule (Include)". At the top, there are two radio buttons: "Specific Locations" (unselected) and "Include By Attributes" (selected). Below the radio buttons, the dialog is split into two main sections. The left section, titled "Select Locations by Attribute", contains a table with two columns: "Attribute" and "Locations". The table lists several attributes: "Catalog Departments", "CLOSING_DATE", "AREA-MANAGER", "STORE-MANAGER", "Chain", "Region", and "GRAND-OPENING-DATE". Each attribute has an "Add" button next to it. The right section, titled "Query", contains a large text area with the placeholder text "Add Attributes to build a query". Above this text area, there is a small header that says "0 Locations In Query". At the bottom right of the dialog, there are three buttons: "Cancel", "OK", and "OK and Add Another".

Figure 5-12: Edit Location Rule (Include) – Include By Attributes

Note: A list of attributes enables you to add one more attributes in order to create a query to select only the locations that fit the requirements.

- Click **Add** to select an attribute. Some Location Attributes can be **collapsed** or **expanded**. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.
 - Click **Add** for another attribute means you are using the condition **AND**. Both conditions must be met.
 - Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click the **Add** button for another attribute.
 - Click **OK** to close the window, or click **Cancel** to close the window without saving.
- Excluded Locations – This option allows you to select specific locations to exclude from the promotion.
 - * Click the **Exclude locations** link.

Figure 5-13: Select Locations

- Specific Locations

Figure 5-14: Edit Location Rule (Exclude) – Specific Locations

- Click the **Specific Location** option.

Note: The Location ID check box at the top of the list enables you to deselect or select all locations. If you deselect all the locations, then you can scroll through the list or search for a specific location.

- Enter part or all of a **Location ID** or **Name**.
- Click **Search**.
- Click **Add** to select a location.
- Click **Add** for another location means you are using the condition **AND**. Both conditions must be met.
- Click **OK and Add Another** to keep you in the same search results and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another location.
- Click **OK** to close the window, or click **Cancel** to close the window without saving.

- Exclude by Attributes

- Click the **Exclude by Attributes** option.

Figure 5-15: Edit Location Rule (Exclude) – Exclude By Attributes

- Click **Add** to select an attribute. Some Location Attributes can be **collapsed** or **expanded**. They will default to collapsed to allow you to scroll thru the list easier and expand the attributes they you to add.
 - Click **Add** for another attribute means you are using the condition **AND**. Both conditions must be met.
 - Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another attribute.
 - Click **OK** to close the window, or click **Cancel** to close the window without saving.
10. When finished entering Locations for the Promotion, click **Next** to continue to the **Offers** tab.
11. To begin the Offers tab, take the following actions:
- There are two methods to add offers, either:
- Select the **Quick Add** option to search for a known Offer ID.
 - Click **+Add Offers** for an Advanced Offer Search.

Select Offers

Included Offers

+ Add Offers
Quick Add
Add

Name and Offer Type	Active Promotions	Offer code
Transaction Discount Offer(ID 7340) ● Transaction Discount	● 0	Offer code

Next >

Figure 5-16: Offers Tab

Note: Refer to [Figure 5-16](#) to enter the Offer Code field. A retailer can use it to qualify or track a particular offer.

- Click **+ Add Offers**. The Add Offers window enables you to search for offers to include in the promotion. Once you receive the results of the search you can sort the results, if desired for easier selection, before adding them to the promotion. Those offers appear in the Included Offers panel.

Add Offers ×

Search

Attribute Type

All

Attribute Value

Maximum Offer Id

Maximum Offer Id

Offer ID

Offer ID

Offer Name

Offer Name

Offer Type

All

Reset
Search

Offers

Sort By Last Update Date

No Offers available to display

Included Offers

Transaction Discount Offer
×

● Transaction Discount

ID:7340

Done

Figure 5-17: Add Offers

- In the Search section, enter **any or all** of the following information:
 - Attribute Type** – Search for an Offer by the Attribute assigned to the Offer. The default will be ALL.

- **Attributes Value** - Type-ahead search according to the Attribute Type selected.
 - **Maximum Offer ID** - Highest Offer ID number you wish to limit the search to. This will return that offer ID and all others with a lower number.
 - **Offer ID** - This Text Field searches all the Offers currently present in the application. This will default to blank.
 - **Offer Name** - Name of the Offer.
 - **Offer Type** - Search the Offer by Offer Type (Single Select). Depending on the Parameter value set in System Configuration (Offer Types), the value will be populated in the list of options. The following list shows the Possible Offer Types:
 - * All (Default)
 - * Buy X Get X
 - * Buy X Get Y
 - * Fixed Quantity/Price
 - * Gift with Purchase
 - * Kit
 - * Line Item Discount
 - * Tiered Discount
 - * Transaction Discount
 - **Intended Use** - The type of Promotion associated with the Offer you are searching for.
- Click **Search**.

Note: To retrieve all the offers in the system, select Search without entering any search criteria. All offers will be returned to the Offers results section. From there, you can scroll through the list to choose which offers to add.

To **clear** the **search** fields and restore **default** selections in the search page, click **Reset**.
 - Upon selecting Search, the results display in the Offers section. Use the **Sort by** list to sort by the following options:
 - Last Update Date
 - Offer Name
 - Offer Type
 - Intended Use
 - Offer ID
 - In the Add Offers window, you can select any of the offers in the Include Offers section and remove them by selecting the X in the top right corner of the Offer. Click **Add** to include the offers in the promotion.
 - When finished selecting offers to add to the Promotion, select **Done**, which returns you to the Select Offers window.
 - On the Select Offers window, you can select the **Remove** option from the **Overflow Menu** to remove an offer from the promotion.
 - Enter the **Offer ID** in the Quick Add field and then click **Add** to also add offers to a promotion.

Figure 5-18: Select Offers Quick Add

12. When finished entering Offers for the Promotion, click **Next** to continue to the **Attributes** tab.
13. Enter the following for the **Attributes** tab.

Name	Value	Description
* MARKET-CIRCULATION	Number	Market Circulation
AUTHORIZED-SIGNATURE	Character + Add Another	Authorized Signature
IN-MARKET-DATE	M/d/yy	Date Promotion In the Market
MARKETING-BUDGET	Currency	Promotion Marketing Budget

Promo-Offer Attributes
☒ Bypass Promo-Offer Attributes

Next >

Figure 5-19: Select Attributes

Complete values for any Promotion Attributes and Promo-Offer Attributes you want added to the promotion. Fields marked with an asterisk are required.

- **Promo-Offer Attributes Switch** – Determines whether Promo-Offer attributes will be used for this Promotion event:
 - **On** – The Promo-Offer Attributes switch defaults to **ON**, which means the step will be bypassed and values for any defined Promo-Offer Attributes will not be required or added to the Promotion.
 - **Off** – When the Promo-Offer Attributes switch is set to **OFF**, it means that values for Promo-Offer Attributes will need to be defined and added to the Promotion.
14. When finished adding Attributes for the Promotion, click **Next**.
 - If the Promotion Type is **Coupon**, go to [Step 15](#) to continue to the **Coupons** tab.
 - If the Promotion Type is **Product**, go to [Step 20](#) to continue to the **Audience** tab.

- If the Promotion Type is **Message**, go to [Step 20](#) to continue to the **Audience** tab.
- If the Promotion Type is **Award**, go to [Step 32](#) to continue to the **Budget** tab.

15. Enter the following for the **Coupons** tab:

- If you **did not select** the **Serialized Coupon** switch in [Step 3](#), proceed to [Step 16](#).
- If you **did select** the **Serialized Coupon** switch in [Step 3](#), proceed to [Step 18](#).

Coupon Serialization - Disabled

The following graphic depicts the options when Coupon Serialization is **Disabled**:

The screenshot shows the 'Coupon Codes' tab in a purple header. Below the header, there's a form with the following elements:

- Offer Name:** Fixed Quantity/Price Offer (ID 14475)
- Offer Type:** Line Item Discount (indicated by a green icon)
- + Add Coupon Code:** A button to add a new coupon code.
- Coupon Code:** A text input field.
- Media Description:** A text input field.
- Estimated Distribution:** A text input field.

Figure 5-20: Coupon Codes Tab – Coupon Serialization - OFF

16. For each Offer that was added to the Promotion, as separate section will appear to complete these fields listed below.

- Coupon Code – Enter a 6 digit code to be used for the coupon.

Note: Values may be generated systematically, provided the PromoCouponCodeManagement configuration is enabled. Contact your system administrator regarding configurations.

- Media Description – Description of the Media for the Coupon
- Estimated Distribution – Estimated Distribution specified for Media for the Coupon

- Click **+ Add Coupon Code** to add another coupon to the Offer for Promotion.
- To delete Coupons from an Offer, click **X** for that row.

17. When finished adding Coupon information for the Promotion, click **Next** to continue to the **Audience** tab. Proceed to [Step 20](#).

Coupon Serialization – Enabled

[Figure 5-21](#) depicts the options when Coupon Serialization is **Enabled**:

The screenshot shows the 'Coupon Codes' tab in a purple header. Below the header, there's a form with the following elements:

- Offer Name:** Fixed Quantity/Price Offer (ID 14475)
- Offer Type:** Line Item Discount (indicated by a green icon)
- + Add Coupon Prefix:** A button to add a new coupon prefix.
- Coupon Prefix:** A text input field containing the value '123456'.
- Media Description:** A text input field.

Figure 5-21: Coupon Codes Tab – Coupon Serialization - ON

18. For each Offer that was added to the Promotion, as separate section will appear to complete these fields listed below.
 - Coupon Prefix – Enter a 6 digit prefix to be used for the coupon.

Note: Values may be generated systematically, provided the PromoCouponCodeManagement configuration is enabled.
Contact your system administrator regarding configurations.

 - Media Description – Description of the Media for the Coupon.
 - Click **+ Add Coupon Code** to add another coupon to the Offer for Promotion.
 - To delete Coupons from an Offer, click **X** for that row.
19. When finished adding Coupon information for the Promotion, click **Next** to continue to the **Audience** tab.
20. Take the following actions for the **Audience** tab.

Audience Definition

Audience Rules

Audience

All
Exclusive
Non-exclusive

Selection Method

Static
Dynamic

Update Method ?

☒ New audience members will be added
☐ Audience members can be added and removed

Define Audience 0 in Audience

Included Audience Groups

+ Add Audience Group

Group Name	Group Count	Included Lists	Strata Level and Name	Count
No Audience Groups Added				

Excluded Audience Groups

+ Add Audience Group

Group Name	Group Count	Included Lists	Strata Level and Name	Count
No Audience Groups Added				

Next >

Figure 5-22: Audience Tab

- **Audience Rules** – Select **All**, **Exclusive**, or **Non-Exclusive** to define the audience.
 - If you select **ALL**, it means this promotion is open to anyone who responds to the sale – everyone who buys items on the promotion get the Offer.
 - The category **All** is defaulted when you open the Audience Window. Make no changes and advance to the next tab to add all customers to be targeted for this promotion.
- **Exclusive Targeting** - If you create an exclusive targeted promotion, this means that **only** the customers you've identified in your target group are **eligible** to receive the promotion at the point of sale.
- **Non-Exclusive Targeting** - If you create a non-exclusive targeted promotion, **all** customers are eligible for the promotion.
 - The **Exclusive** and **Non-Exclusive** options **operate** the **same** - the difference is only if the Promotion is exclusive to just those customers or non-exclusive for the groups selected. The Static and Dynamic selections apply to both.

- * **Static** – Only customers defined at this time are considered eligible for the promotion.
- * **Dynamic** – Dynamic can not only add customers but also remove customers that no longer apply. When Dynamic is selected, **Update Method** is available.
 - **New audience members will be added** – When the Dynamic Promotions job runs, any new customers found that meet the criteria, are added to the audience. All customers currently in the audience will remain in the audience.
 - **Audience members can be added and removed** – When the Dynamic Promotions job runs, any new customers found that meet the criteria, are added to the audience. Additionally, only the customers that meet the criteria will be included in the audience. If the customer is in the audience before the job runs, but no longer meets the criteria, the customer will be removed from the audience.
- * Define Audience
 - Included Audience Groups
 - Click **+ Add Audience Group**.

Figure 5-23: Add Audience Group (Include)

- Select an **Available List** type
 - **All** – Default
 - **Stratified** – The Customers within a Stratified list are divided into levels.
 - **Unstratified** – The Customers within an Unstratified list are not differentiated into separate groups.
 - **Personal** – Customers maintained by the user.
- In the Search field, enter some or all of the **List Name, ID, or Strata Name**.
- Click **Search**.
- The results can be sorted by using the **Sort by** list menu with the following options:
 - Last Updated
 - Name
 - Customer Count
- Enter a **Group Name**.

When lists are added from the Available Lists area, they appear in the Audience Groups section of the window. The Audience Group section Group Name automatically defaults to the name of the first list added. You can change the Group Name to something more meaningful to describe the group of customers, if desired.

Figure 5-24: Add Audience Group (Include)

- Click **Add** to add the selection Assigned Audience Lists.
- Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.
- Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.

Group Name	Group Count	Included Lists	Strata Level and Name	Count
My Customer List	23	My Customer List (ID 4415)	No Strata	23
FranchiseeCustomers	34	FranchiseeCustomers (ID 4953)	No Strata	34

Figure 5-25: Audience Definition

As shown in [figure 5-25](#) the Group Count is shown for each audience group. In the Audience Rules section the total count is provided on the right hand side.

Columns include the following details:

- **Group Name**
- **Group Count**
- **Included Lists**
- **Strata Name and Level** (if applicable)
- **Count**

Each Group Name has an **Overflow Menu Icon** where you can **Edit** or **Remove** the **Audience Group** from the list.

The **Included Lists** column displays a **link** on that list (also known as a segment) and that link will open to the Audience List Details window.

In this window, the following sections may display, depending on the type of list and which of the options were selected when the list was created:

- List Options section
- Criteria section
- Trend Results section
- Strata Levels section
- Attributes section
- Franchisees section
- Message section
- Scheduled Jobs section

List Details

List Name

Customers-West (ID 4960)
Description Customers-West

9,047 Customers

Created by on 12/11/19

List Options

☐ Export
☐ Open Access
☒ Permanent
☒ Public
☐ Publish To Batch Exporter
☐ Publish To Clienteling
☐ Publish To Task Generator
☒ Save as List
☐ Trend Results?

Trend Results

Run ID	Run Date	Customer Count
0	12/11/19 1:25 PM	9,051

Attributes

Name	Value	Description
INACTIVE?	No	Includes Inactive Customers?
Children	No	Do you have children?

Criteria

Segment Syntax: Active Customers AND Customer State = FL AND (Customer city of residence = ORLANDO OR Customer city of residence = LAKE WALES)

Done

Figure 5-26: List Details

The checked List Options vary by the selections made when the list was created, and may include the following fields:

- **Export** – Indicates whether the Segment list is automatically exported after the Segment Query is run.
- **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.
- **Public** – Indicates whether the Segment is Public.

- **Publish to Batch Exporter** – Indicates whether the Segment has been made available for export to a Marketing system.
- **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.
- **Save as List** – Indicates whether a list of matching Customer IDs is created when the Segment is created.
- **Trend Results** – Indicates whether the results of the Segment run are kept to provide trend information about the Segment.

Figure 5-27 displays the Trend Results in a chart. A user can scroll down to see a table (see Figure 5-28), which for this segment shows the Strata Levels Against Customer Age and displays the strata that are shown in the graph.

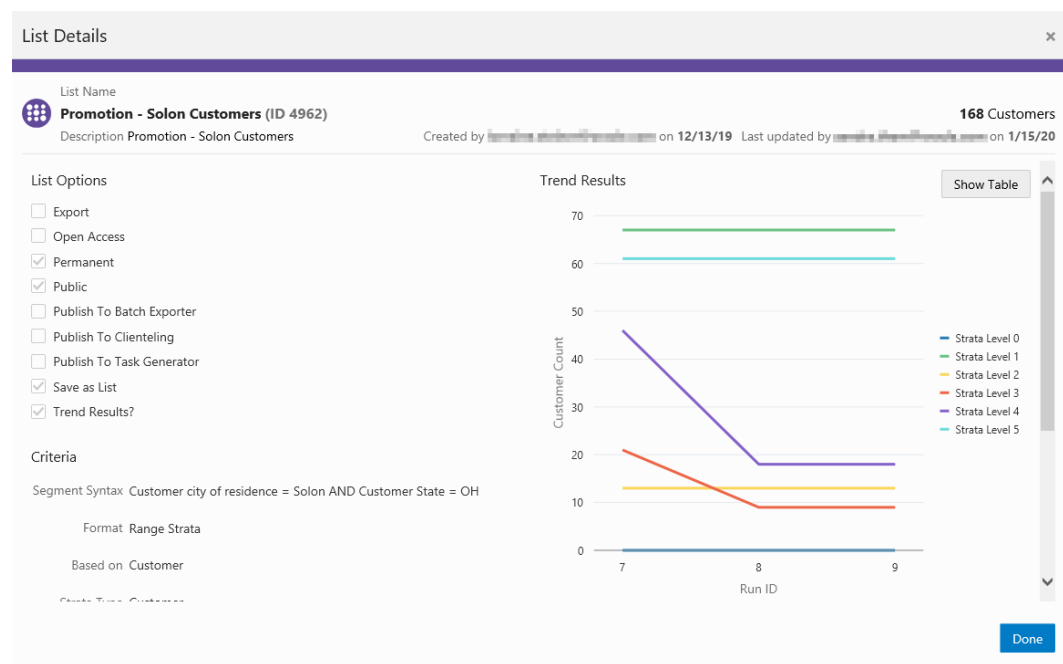


Figure 5-27: List Details Trend Results – Chart

Strata Levels Against Customer Age

Strata Name	Range From (>=)	Range To (<)	Customer Count
Age 0 - 9	0	10	67
Age 10 - 24	10	25	13
Age 25 - 29	25	30	9
Age 30 - 39	30	40	18
Age 40 >	40	>	61

Figure 5-28: Trend Results Graph – Table

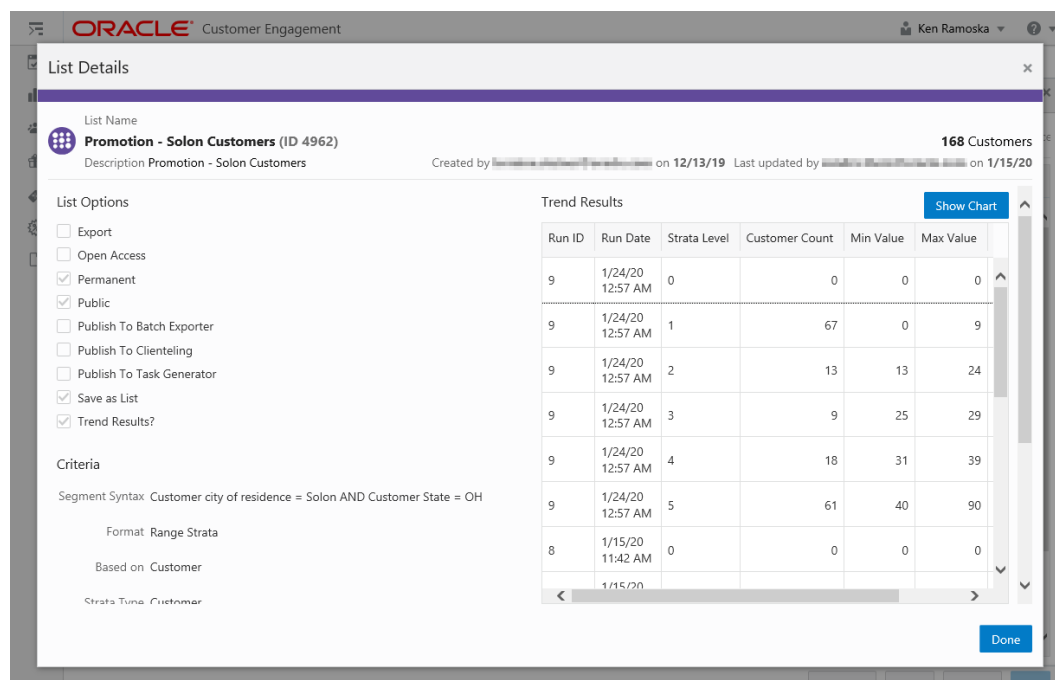


Figure 5-29: List Details Trend Results – Table

- Click **Done** to close the Audience List Details window.

The screenshot shows the 'Audience Definition' window. It includes sections for 'Audience Rules' (All, Exclusive, Non-exclusive), 'Define Audience' (Static, Dynamic), and 'Included Audience Groups'. A red box highlights the 'Exclude Audience Groups' link. Below this, there is a table for 'Included Audience Groups' with columns: Group Name, Group Count, Included Lists, Strata Level and Name, and Count. The table currently shows 'No Audience Groups Added'.

Figure 5-30: Audience Definition – Exclude Audience Groups

- Exclude Audience Groups** – If you wish to exclude certain groups of customers that may also be a part of the Included Group, you can do that by selecting the **Exclude Audience Groups** link, which opens a new section in the **Audience Definition** window.
 - Select the **Exclude Audience Groups** link.
 - Click **+ Add Audience Group**.
 - Select an Available List type
 - All** – Default group listing.
 - Stratified** – The Customers within a Stratified list are divided into levels.

- * **Unstratified** – The Customers within an Unstratified list are not differentiated into separate groups.
 - * **Personal** – User created groups.
 - In the Search field, enter some or all of the **List Name, ID, or Strata Name**.
 - Click **Search**.
 - The results can be sorted by using the **Sort by** list menu with the following options:
 - * Last Updated
 - * Name
 - * Customer Count
 - Enter a **Group Name**.
 - Click **Add** to add the selection Assigned Audience Lists.
 - Click **Add** for another list means you are using the condition **AND**. Both conditions must be met.
 - Click **OK and Add Another** to keep you in the same window and use the condition **OR**. One or more of the conditions must be met when you click **Add** for another Audience Group.
21. When finished entering all Audience Groups for the Promotion, click **Next** to continue to the **Filtering Audience** tab.
22. Enter the following for the **Filtering Audience** tab.

7 **Filtering Audience** | 8 Split Audience | 9 Control Groups | 10 Export Channels | 11 Budget

Audience Filter

Audience Filtering

Customer Household Consolidation: None (Target Icon) 2,278 Audience Count 0 Filtered Count

Audience Group Name	Audience Count	Approximate Household Count	Filter
St. Pete and Clearwater Area Customers	2278	2278	None Top Sales

Next >

Figure 5-31: Filtering Audience Tab

- 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.
 - **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.
- Select the **Filter Type** for each Audience:

Audience Filter

Audience Filtering

Customer Household Consolidation None 14,598 Audience Count 0 Filtered Count

Audience Group Name	Audience Count	Approximate Household Count	Filter	Filter Value
Dallas customers	14598	14583	None Top Sales Random	0

Next

Figure 5-32: Select Desired Filtering

- * **None** - [DEFAULT] All Customers in the Audience Group are eligible.
 - * **Top Sales** - Customers from the Audience Group will be chosen for eligibility by the greatest total amount of purchases.
 - * **Random** - Customers from the Audience Group will be chosen randomly for eligibility.
- Enter a **filter value** to indicate the **number of customers eligible** for the promotion.
23. When finished entering any household filtering for the **Audience Groups** for the Promotion, click **Next** to continue to the **Split Audience** tab.
24. In the **Split Audience** tab, filtered audiences can, optionally, be **split** into smaller, **separate** audiences. If desired, create splits for the filtered audiences on the promotion.
- Click **Split**.

Split Audience Groups

Audience Group Name	Count	
Dallas customers	14598	Split

Name	Count	Percent	
Dallas customers_1	7299	50.00	×
Dallas customers_2	7299	50.00	×

Figure 5-33: Split Audience Groups

- The split **Name** field is automatically populated from the name of the **Audience Group Name**. If desired, you can change the name of the splits in this step.
- Select **Split** to automatically divide the Audience Group into equal portions and percentages. If you desire different portions or percentages for the splits, enter either a count or a percentage, and the corresponding field will update.

25. When finished entering any **Audience Group** splits for the Promotion, click **Next** to continue to the **Control Groups** tab.
26. Enter the following information for the **Control Groups** tab.

Define Control Groups

Control Groups

Style

None
By Promotion
By Audience Group

Audience Group Name	Original Count	Control Group Count	Percent	New Count
Dallas customers_1	4866	0	0.00	4866
Dallas customers_2	4866	0	0.00	4866
Dallas customers_3	4866	0	0.00	4866
Total	14598	0	0.00	14598

Next >

Figure 5-34: Define Control Groups

- The control group is a statistically identical group that doesn't receive the offer. Following the promotional period, the results of the two groups are compared and you can determine if the offer generated incremental revenue. Options include:
 - **None** – No Control Group
 - **By Promotion** – Enter either a New Count or Percent. The corresponding field will update automatically to determine the size of the control group.
 - **By Audience Group** – Enter either a Control Group count or percentage for each split created earlier. The corresponding field will update automatically.
27. When finished entering any **Control Groups** for the Promotion, click **Next** to continue to the **Export Channels** tab.
28. Enter the following information for the **Export Channels** tab. The options include:

Export Channels

Audience Name	Mail	Email/Batch Exporter	Phone	Clienteling	Clienteling Details
Customers-West <i>9047 Customer(s)</i>	☐	☐	☐	☒	Assign Tasks To ☒ Location ☐ Associate
Filter ☐					
Customers with Children <i>18 Customer(s)</i>	☐	☒	☐	☐	

Batch Exporter

Export Filename	Prefix	Static Name	Suffix
Audience Export filename <i>Filename {yyyy-MM-dd_HH:mm:ss}_PromotionTargetsSync</i>	yyyy-MM-dd_HH:mm:ss ▼	_PromotionTargetsSync	None ▼
Offers Export filename <i>Filename {yyyy-MM-dd_HH:mm:ss}_PromotionDealsSync</i>	yyyy-MM-dd_HH:mm:ss ▼	_PromotionDealsSync	None ▼
Offers and Promo-Offers Attributes Export filename <i>Filename {yyyy-MM-dd_HH:mm:ss}_PromotionDealsAttributesSync</i>	yyyy-MM-dd_HH:mm:ss ▼	_PromotionDealsAttributesSync	None ▼

Figure 5-35: Export Channels Tab

- **Mail** - Determines whether the Customers in the Split/Control Group will be contacted by Mail.
- **E-Mail / Batch Exporter** - Determines whether the Customers in the Split/Control Group will be contacted by Email.

Note: The system configuration setting “SupportedBatchExporters” determines if the Batch Exporter section is displayed.

- Export Filename - Name of the file.
- Prefix - Indicates the format of the datetime stamp used as a prefix the filename. Optional. Possible settings are yyyyMMdd_HH:mm:ss, yyyy-MMdd_HH:mm:ss, or none.
- Static Name - The identifying filename.
- Suffix - Indicates the format of the datetime stamp used as a suffix the filename. Optional. Possible settings are yyyyMMdd_HH:mm:ss, yyyy-MMdd_HH:mm:ss, or none.
- Filename - Displays an example of the export file name with the prefix and suffix format, if any.
- **Phone** - Determines whether the Customers are contacted by phone.
- **Clienteling** - When the Clienteling switch is turned on, tasks will be created based on the assigned associates or locations for the defined target audience when the promotion is generated.

The screenshot shows the 'Export Channels' interface with the 'Clienteling Details' tab selected. The 'Audience Name' field displays 'Strata Trend Result' and '24 Customer(s)'. The 'Assign Tasks To' section has 'Location' selected. The 'Filter' checkbox is checked. The 'Max Count Per' field is set to 'Location'. The 'Method' dropdown menu is open, showing options: 'Random' (selected), 'Top - Recent Purchase', 'Top - LT Sales', and 'Top - Numeric Attribute'. The 'Batch Exporter' section includes fields for 'Export Filename', 'Prefix', and 'Static Name'. A note at the bottom states 'No Batch Exports (based on current Email Channel selections)'.

Figure 5-36: Clienteling Details

- Assign Tasks to:
 - * **Location Channel** – Tasks are assigned to a Location.
 - * **Associate Channel** – Tasks are assigned to an associate in a location.
 - The following fields are enabled if the Filter option is selected:
 - * **Max Count Per <type>** – Determines the maximum number of target Customers that will be contacted through the channel.
 - * **Method** – Method used to select the Customers contacted. Options include:
 - Random – Select Customers Randomly (Default).
 - 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.
29. When finished entering any **Export Channels** for the **Promotion**, click **Next** to continue to the **Event Definition** tab.
30. Enter the following information on the **Event Definition** tab.

Note: The Event Definition Tab displays only when the Promotion uses the Clienteling Channel.

Figure 5-37: Event Definition Tab

- Enter a description of the Event in the Event Description field (required).
- Select the Edit option to add an image to the Event.
 - a. Perform either of the following actions:
 - * Click **Drop a new image here or click to upload** to add the image and continue to [Step b](#).
 - * Enter a **URL** in **Or Via URL** and click **Upload** and continue to [Step b](#).
 - * Click **Remove Image** to remove the image and continue to [Step b](#).
 - b. Click **Done** to **save** the changes and close the window, or click **Cancel** to **close** the window **without saving** any changes.
- **Event Task Escalation** – This option will flag an Event Task for the promotion as high priority on the Day Planner Task panel based on the number days before the end date of the promotion event task.
- **Event Documents** – Click the Action Menu, and click **Add**, or click the **Add icon (+)** to open the Add Event Documents window.

Figure 5-38: Add Event Documents

- Use the **Drop a file here or click to upload** area to add an event document.
- Click **OK** to **save** the changes and close the window, or click **Cancel** to close the window **without saving** any changes.

31. When finished entering any **Event Definitions** for the **Promotion**, click **Next** to continue to the **Budget** tab.
32. Enter the following information on the **Budget** tab.

Budget

Promotion Costs

Description	Budget Amount	Actual Amount
	\$0.00	\$0.00

Audience Group Costs

Audience Group Name	Channel	Quantity	Budget Fixed	Budget CPM	Budget Total	Actual Fi
Dallas customers_1	Mail	3200	200	500	1,800	600
Dallas customers_2	Email	3199	100	100	419.9	200
Dallas customers_3	Mail	3199			0	
Dallas customers_3	Phone	3199			0	
					\$2,219.90	

<>

Figure 5-39: Budget Tab

- a. Click **Add** to enter the Promotion Costs. Enter values in any field is optional.
 - b. Enter a **Description** of the cost item.
 - c. Enter the budgeted amount for the Promotion in the **Budget Amount** field.
 - d. Enter the actual amount for the Promotion in the **Actual Amount** field.
 - e. Click **Add** if you wish to enter **another** budget line for the **promotion**, then follow **steps a-d** to complete the fields.
- If Export Channels were selected for the audience group, the Audience Groups Costs section appears. Entering values in any field is optional.

Audience Group Costs					
Budget Fixed	Budget CPM	Budget Total	Actual Fixed	Actual CPM	Actual Total
200	1	200	300	1	300
200	1	200	50	1	50
\$400.00					\$350
< >					

Figure 5-40: Audience Group Costs

- f. In the **Budget-Fixed** field, enter the fixed cost budgeted for the audience.
 - g. In the **Budget-CPM** field, enter the cost budgeted for the Channel for each 1,000 Customers.
 - h. In the **Actual-Fixed** field, enter the actual fixed cost of the Channel.
 - i. In the **Actual-CPM** field, enter the actual cost of the Channel for each 1,000 Customers.
 - j. Repeat steps f-i for each **Target Channel** in the **Promotion**.
33. When finished entering any **Budget Costs** for the **Promotion**, click **Next** to continue to the **Save Options** tab.
 34. Enter the following information in the **Save Options** tab. You can enter more than one choice.

Options After Save

After saving this promotion, also perform the following actions:

- ☐ Generate
Start a job to generate promotion audience data.
- ☐ Approve
Set this promotion's status to Approved.
- ☐ Export
Start a job to create files for exporting this promotion to an external/POS/batch system.

Dynamic Promotion Options

Set the export option for the Dynamic Promotion Job processing.

- ☐ Output Additions Only
Only customers added to the event as a result of segment processing will be exported.
- ☒ Output All Updates
All customers updated or added to the event as a result of segment processing will be exported.

[Next >](#)

Figure 5-41: Options After Save Tab

- **Generate** – Start a job to generate promotion audience data.
- **Approve** – Set this promotion's status to Approved.

- **Export** – Start a job to create files for exporting this promotion to an external/POS/batch system. This option **automatically approves** the Promotion.
- **Dynamic Promotion Options** – Select one of the two export options for processing when using the **Dynamic** selection method on the Audience tab.

Note: Depending on the type of promotion that you created, different Options After Save are available.

35. When finished entering any **Save Options** for the **Promotion**, click **Next**.
- If the Promotion Type is **Coupon** go to [Step 36](#) to continue to the **Coupon Type Promotion** Review tab.
 - If the Promotion Type is **Product**, go to [Step 6](#) to continue in the **Creating a Product Promotion** Review tab.
 - If the Promotion Type is **Message**, go to [Step 6](#) to continue in the **Creating a Message Promotion** Review tab.
 - If the Promotion Type is **Award**, go to [Step 8](#) to continue in the **Creating an Award Promotion** Review tab.
36. The **Review** tab displays the key elements in the Promotion Setup.

The screenshot displays the 'Review Promotion Setup' interface. At the top, a purple header bar contains the title 'Review Promotion Setup'. Below this, a table-like structure shows the promotion details: Promotion Name (Summer), Description (Summer), Campaign Name (Summer), and Timeframe (3/19/20 12:00 AM - 3/31/20 12:00 AM). To the right of this table is a purple button labeled 'Coupon'. Below the table, there are three main sections: '473 Locations' with a sub-section 'Included All Locations Included'; '1 Offers' with a sub-section 'Offer Name Transaction Discount (ID 13966)' and 'Intended Use: Coupon'; and '1 Coupon Codes' with a sub-section 'Coupon Code 123456' and details for 'Media Descrip...', 'Estimated Dist...', and 'Serialized Cou...'. At the bottom right, there are four buttons: 'Previous', 'Next', 'Cancel', and 'OK'.

Figure 5-42: Review Tab

37. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any Tab to return to any point of the Create Promotion process.

Working with Coupon Promotions

Creating Additional Coupons

Users have the ability to create additional coupons for a Coupon Promotion with Serialized Coupons, so that you are not limited to only the coupons generated at the time of saving the promotion. To create an additional coupon do the following steps:

1. View a Coupon Promotion (for more information on how to view a promotion see [Viewing a Promotion](#))
2. Click the **Overflow Menu**
3. Click **Create Coupons**.

Note: Some Coupon Promotions cannot be edited once saved.

Create Coupons for Coupon Promotion with Serialization (ID 903) ×

i Promotion runs from 3/6/20 to 3/27/20

Offer Name	Offer Type	Offer Group
Fixed Quantity Testing (ID 13448)	Fixed Quantity/Price	13448

Coupon Prefix	Media Description	Current Count	Additional Coupons
008750		0	0
008751		0	0

Cancel Create Coupons

Figure 5-43: Create Coupons

4. Enter the number of **Additional Coupons**.
5. Click **Create Coupons** to create additional coupons, or click **Cancel** to return to the View Promotion window without saving any changes.

Creating a Product Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

Note: You will need the Promotion Home role to access the Promotion Home screen.

Promotion Search

Search

Campaign

All ▼

Promotion Search

Enter search parameters in the sidebar to search for Promotions.

Create Promotion

Figure 5-44: Promotion Search

1. Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Figure 5-45: Information Tab

2. Select the **Promotion Type**: Product

Note: Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. Select one of the choices for the **Campaign**.

- **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
- **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
 - Click the list arrow and select an **existing campaign**.

Note: The Start Date and End Date display underneath the Existing Campaign list.

- **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.
4. Enter the following information:
- Enter a **Campaign Name** (for new Campaigns only).
 - Enter a **Description** (for new Campaigns only).
 - Enter a **Name**.
 - Enter a **Description**.
 - Select a **Start Date**.
 - Select an **End Date**.
5. When finished entering the Campaign and Promotion information, click **Next**. To continue to the **Franchisees** tab, see [step 7](#) in [Creating a Coupon Promotion](#).
6. The **Review** tab displays the key elements in the Promotion Setup.

Promotion Name	Description	Campaign Name	Timeframe
asfd	af	asfd	11/27/19 12:00 AM - 11/29/19 12:00 AM

Attribute Name	Attribute Value	Description
MARKET-CIRCULATION	34	Market Ci

Figure 5-46: Review Tab

- Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any Tab to return to any point of the Create Promotion process.

Creating a Message Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

Note: You will need the Promotion Home role to access the Promotion Home screen.

Figure 5-47: Promotion Search

- Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Create Promotion

1 Information 2 Franchisees 3 Locations 4 Attributes 5 Audience 6 Budget 7 Save Options 8 Review

Promotion Definition

Promotion Type

- Coupon**
Utilizes embedded coupons placed in various media, such as magazines or newspapers
Coupon Serialization
- Product**
Receive monetary savings in exchange for the purchase of specific merchandise
- Message** (Selected)
Send out communications not specifically associated with any offers
- Award**
Award entitlement coupons or e-awards

Campaign

- ☒ Auto-create campaign
- ☐ Associate this promotion with an existing campaign
- ☐ Create a new campaign for this promotion

Promotion Information

- * Name
- * Description
- * Start Date: 03/19/20 12:00 AM
- * End Date: M/d/yy h:mm a

Promotion Information Summary

Information	No information entered
Franchisees	All Franchisees defined
Locations	All Locations Included
Attributes	No promotion attributes defined No promo-offer attributes defined
Audience	No targeted audience defined
Budget	No budget details defined
Save Options	No save options to display

Next > Previous Next Cancel OK

Figure 5-48: Information Tab

2. Select the **Promotion Type**: Message

Note: Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. Select one of the choices for the **Campaign**.

- **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
- **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
 - Click the list arrow and select an **existing campaign**.

Note: The Start Date and End Date display underneath the Existing Campaign list.

- **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.

4. Enter the following information:

- Enter a **Campaign Name** (for new Campaigns only).
- Enter a **Description** (for new Campaigns only).
- Enter a **Name**.
- Enter a **Description**.
- Select a **Start Date**.
- Select an **End Date**.

5. When finished entering the Campaign and Promotion information, click **Next**. To continue to the **Franchisees** tab, see [step 7](#) in [Creating a Coupon Promotion](#).6. The **Review** tab displays the key elements in the Promotion Setup.

Promotion Name	Description	Campaign Name	Timeframe
Summer	Summer	Summer	3/19/20 12:00 AM - 3/31/20 12:00 AM

473 Locations

44 Customers in Audience

Audience	Selection Method
Exclusive	Static

Included	Strata Query Result	44 Customers

Previous Next Cancel OK

Figure 5-49: Review Tab

7. Click **OK** to save the Promotion, or click **Cancel** to close the promotion without saving. Click **Previous** or any Tab to return to any point of the Create Promotion process.

Creating an Award Promotion

There are a few choices available to start the process of creating a promotion. The **Create Promotion** button is available in both the Promotion Home window as well as the Promotion Search window.

Note: You will need the Promotion Home role to access the Promotion Home screen.

Search

Campaign

All

Promotion Search

Enter search parameters in the sidebar to search for Promotions.

Create Promotion

Figure 5-50: Promotion Search

1. Click **Create Promotion**, which opens up the Promotion wizard to the Information tab.

Create Promotion

1 Information 2 Franchisees 3 Awards 4 Attributes 5 Budget 6 Save Options 7 Review

Promotion Definition

Promotion Type

- Coupon**
Utilizes embedded coupons placed in various media, such as magazines or newspapers
Coupon Serialization
- Product**
Receive monetary savings in exchange for the purchase of specific merchandise
- Message**
Send out communications not specifically associated with any offers
- Award** (Selected)
Award entitlement coupons or e-awards

Campaign

- ☒ Auto-create campaign
- ☐ Associate this promotion with an existing campaign
- ☐ Create a new campaign for this promotion

Promotion Information

- * Name
- * Description
- * Start Date: 03/19/20 12:00 AM
- * End Date: M/d/yy h:mm a

Promotion Information Summary

- Information**
No information entered
- Franchisees**
All Franchisees defined
- Awards**
No awards certificate defined
- Attributes**
No promotion attributes defined
No promo-offer attributes defined
- Budget**
No budget details defined
- Save Options**
No save options to display

Next Previous Next Cancel OK

Figure 5-51: Information Tab

2. Select the **Promotion Type: Award**

Note: Contact your administrator if you do not see the Promotion Types needed for your promotion.

3. Select one of the choices for the **Campaign**.

- **Auto-create Campaign** – The campaign is automatically created and will use the same name and description from the promotion name and description.
- **Associate this promotion with an existing campaign** – Uses existing campaigns in the system.
 - Click the list arrow and select an **existing campaign**.

Note: The Start Date and End Date display underneath the Existing Campaign list.

- **Create a new campaign for this promotion** – A new campaign will be created with this promotion being the first added.

4. Enter the following information:

- Enter a **Campaign Name** (for new Campaigns only).
- Enter a **Description** (for new Campaigns only).
- Enter a **Name**.
- Enter a **Description**.
- Select a **Start Date**.
- Select an **End Date**.

5. When finished entering the Campaign and Promotion information, click **Next**. To continue to the **Franchisees** tab, see [step 7](#) in [Creating a Coupon Promotion](#).6. To assign awards for the **Awards** tab, do the following:

Award promotions are based on award card definitions. Awards (EAwards or Entitlement Offer 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 nontargeted, 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.

Figure 5-52: Select Award Tab

- Click **+Select Program**, which retrieves all available Award Programs for selection.

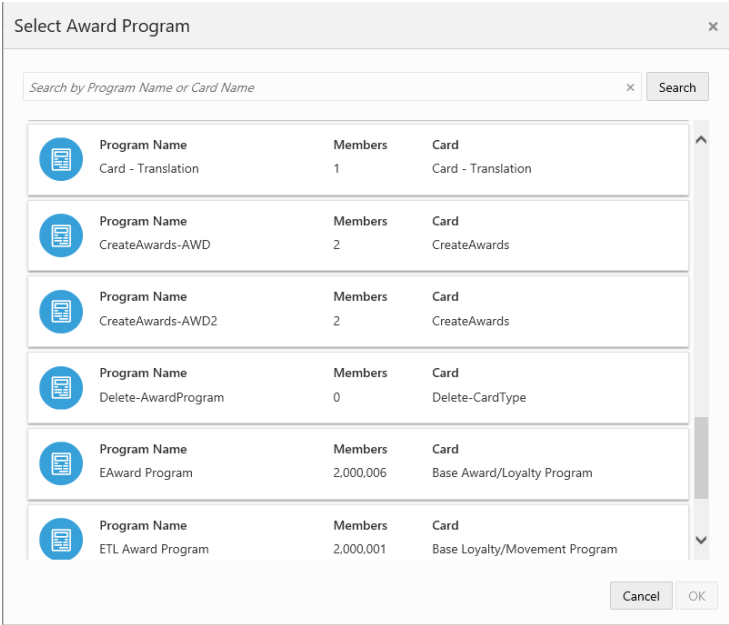


Figure 5-53: Select Award Program

- If the list is too long, you may enter some or all of the Program Name or Card Name in the Search for Award field to refine the results.
- Click **Search**.
- Click the **row** of the desired **Award Program**.

Note: Only one program can be selected at a time.

- Click **Ok**.

Note: Once the Program details display, if you wish to change the Award Program, you can click **Change**, which re-opens the Select Award Program window where you can select a different program for your promotion.

▪ Certificate Options

Do the following to select a Certificate Type:

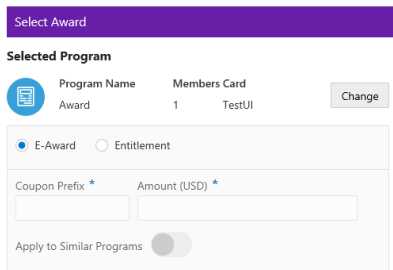


Figure 5-54: Award Program Certificate Options

Select Award

Selected Program

	Program Name	Members	Card	
	99006-AwardProgram-ETL-1	0	99006-AwardProgram-ETL-1	Change

☒ E-Award
☐ Entitlement

Coupon Prefix *

Amount (USD) *

Apply to Similar Programs ☐

Figure 5-55: Award Program Certificate Options – E-Award

- Select a Certificate Type of E-Award
 - * Enter a Coupon Prefix. The value must be 10 or fewer characters.
 - * Enter the Amount for the award certificate.
- Or

Select Award

Selected Program

	Program Name	Members	Card	
	99006-AwardProgram-ETL-1	0	99006-AwardProgram-ETL-1	Change

☐ E-Award
☒ Entitlement

Offer *

Coupon Prefix *

Discount

Amount Off \$10.00

Apply to Similar Programs ☐

Figure 5-56: Award Program Certificate Options – Entitlement

- Select a Certificate Type of **Entitlement**.
 - * Click inside the **Offer** field to see the list of Entitlement Offers associated to the Award Program. If there is more than one, you can choose which one to select. The Offer you choose will then display the value of the discount associated with that Offer (in the Discount field).
 - * Enter a **Coupon Prefix**. The value must be 10 or fewer characters.

- * Discount - this field will automatically populate with the discount for the Offer

- Options

The screenshot shows the 'Select Award' form. The top bar is purple with the text 'Select Award'. Below it, the 'Selected Program' section displays a blue icon, 'Program Name' as '00007 Award', 'Members' as '6', and 'Card' as 'Card 00007-'. A 'Change' button is to the right. Below this, there are radio buttons for 'E-Award' (selected) and 'Entitlement'. Further down are input fields for 'Coupon Prefix' and 'Amount (USD)', and a toggle for 'Apply to Similar Programs'. On the right side, the 'Options' section has two checkboxes: 'Issue to registered cards only' and 'Issue coupons dynamically'. Below that, the 'Award Validity Period' section shows two options: 'Fixed' (selected with a checkmark) and 'Relative'. The 'Fixed' option shows 'From' and 'To' dates as '03/19/20' and '03/31/20' respectively. The 'Relative' option shows a 'Validity Period' dropdown set to 'Days'. A 'Next >' button is at the bottom right.

Figure 5-57: Select Award Certificate Options

- 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.
- 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.
- Award Validity Period – Only one of the options will be available for the Award certificate.
 - **Fixed** – The award certificate is valid between specific dates.
 - * 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.
 - * 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 list can only be set to Days.
- Apply to Similar Programs is activated when similar programs are available.

Select Award

Selected Program

Program Name	Members	Card
99005-AwardProgram-1-EAward	10	PromotionAwardCard

Change

E-Award

Entitlement

Coupon Prefix *

Amount (USD) *

Apply to Similar Programs

Apply to Similar Programs

Search by Program Name or Card Name

x

Search

	Program Name	Members	Card
☒	99005-AwardProgram-2-EAward	10	PromotionAwardCard
☒	99005-AwardProgram-3-EAward	10	PromotionAwardCard

Options

Issue to registered cards only

Issue coupons dynamically

Award Validity Period

Fixed

From *

To *

03/19/20

03/31/20

Relative

Validity Period

Days

Next >

Figure 5-58: Apply to Similar Programs

- All Similar Programs meeting the criteria will display, but if you wish to filter the results you may enter some or all of the Program Name or Card Name in the Search field and click **Search**.
 - Click the check box for the rows of the desired Award Programs you wish to add.
 - Click **Ok**.
- When finished entering Awards for the Promotion, click **Next**. To continue to the **Attributes** tab, see [Step 13 in Creating a Coupon Promotion](#).
 - The **Review** tab displays the key elements in the Promotion Setup.

Review Promotion Setup

Promotion Name	Description	Campaign Name	Timeframe
Summer	Summer is Here	Summer	3/19/20 12:00 AM - 3/31/20 12:00 AM

Award

Award Program

Valid from 3/19/20 to 3/31/20

Issue to all cards in the award program

Card 00007 - Mendo's card

00007 Award

Certificate Type	E-Award
Coupon Prefix	123456
Amount (USD)	\$25.00

Previous

Next

Cancel

OK

Figure 5-59: Review Tab

9. Click **OK** to save the Promotion, or click Cancel to close the promotion without saving. Click **Previous** or any Tab to return to any point of the Create Promotion process.

Promotion Actions

From within the Promotion Home and Promotion Advanced Search windows, there are different Overflow Menus that enable you to perform some of following actions:

- **Approve** – Approves the promotion the user is viewing.
- **Duplicate** – Opens a new window enabling the promotion wizard for a copy of the existing promotion.
- **Edit** – Opens a new window enabling the promotion for editing.
- **Export Promotion Definition** – The definition of the Promotion is exported in a job, and associated export files are then attached to the Export Promotion in the Process Queue page.

Note: This option is not available for an Award Promotion.

- **Export to Batch** – This option exports details about the Promotion, in a job, including the Offers, Attributes, Audience, and Serialized Coupons, if applicable. The files are listed in the Process Queue page under the Promotion Batch Export job for this Promotion.

Note: This option is available only if one or more types are selected for the Supported Batch Exporter Types property in System Configuration.

- **Generate** – Creates generate job that can be accessed via the Job Process Queue.
- **Terminate** – This action will terminate the Promotion on the current date as well as disable the associated Offers on the Promotion.
- **View** – Opens a new window, displaying the Review tab for the Promotion.

Note: The options will vary based on the promotion type and the user permissions.

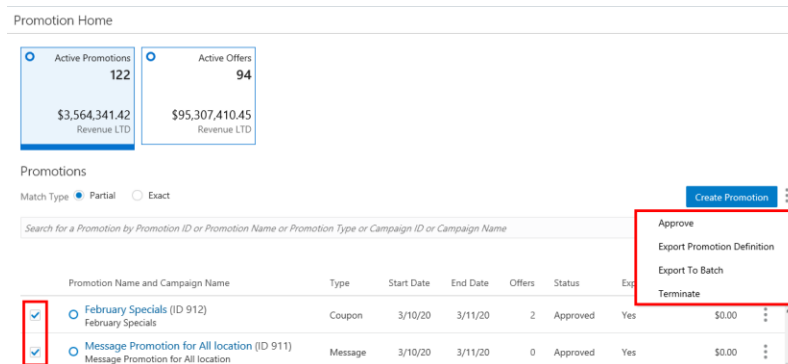


Figure 5-60: Promotion Home Overflow Menu Options: One or More Promotions

From within the Promotion Quick Search screen and the Promotion Advance Search screen, you can check one or many of the individual promotions using the checkbox to the left of the Promotion row. Then you can click the Overflow Menu to perform the following actions against the promotions:

- Approve
- Export Promotion
- Export to Batch
- Terminate

Promotion Home

Active Promotions
122
\$3,564,341.42
Revenue LTD

Active Offers
94
\$95,307,410.45
Revenue LTD

Promotions

Match Type: ☒ Partial ☐ Exact Create Promotion

Search for a Promotion by Promotion ID or Promotion Name or Promotion Type or Campaign ID or Campaign Name

Promotion Advanced Search

Promotion Name and Campaign Name	Type	Start Date	End Date	Offers	Status	Exported	Revenue LTD
☐ February Specials (ID 912) February Specials	Coupon	3/10/20	3/11/20	2	Approved	Yes	\$0.00
☐ Message Promotion for All location (ID 911) Message Promotion for All location	Message	3/10/20	3/11/20	0	Approved		
☐ Promo 213 (ID 910) Award Promotion Date 9-3-2020	Product	3/10/20	3/31/20	2	Approved		
☐ Award Promotion Date 9-3-2020 (ID 909) Award Promotion Date 9-3-2020	Award	3/10/20	3/31/20	0	Saved		
☐ Similar Award (ID 908) Similar Award	Award	3/10/20	3/26/20	0	Saved		
☐ Xstore Offer Export Testing (ID 791)							

Approve
Duplicate
Edit
Export Promotion Definition
Export To Batch
Generate
Terminate
View

Figure 5-61: Promotion Home Quick Search Overflow Menu Options: Single Promotion

From within the Promotion Quick Search screen and the Promotion Advance Search screen, you can click the Overflow Menu to the right of the individual promotion, and perform the following actions:

- Approve
- Duplicate
- Edit
- Export Promotion Definition
- Export to Batch
- Generate
- Terminate
- View

Editing a Promotion

There are three places that a user can find the Duplicate option in order to duplicate a Promotion:

- Select **Edit** under the Action Menu (also known as the Overflow Menu) icon for each individual Promotion on the Promotion Advanced Search screen.
- Select **Edit** in the Overflow Menu on each individual Promotion on the Promotion List screen (which displays in the Promotion Home menu).
- Select **Edit** in the Overflow Menu for the individual Promotion on the Promotion Scorecard.

Edit Promotion (ID 675)

1 Information 2 Locations 3 Offers 4 Attributes 5 Budget 6 Save Options 7 Review

Promotion Definition

Promotion Type

Product
Receive monetary savings in exchange for the purchase of specific merchandise

Campaign

☒ Auto-create campaign
☐ Associate this promotion with an existing campaign
☐ Create a new campaign for this promotion

Promotion Information

* Name Franchisee Promotion
 * Description Franchisee Promotion
 * Start Date 11/28/19 12:00 AM
 * End Date 12/31/19 12:00 AM

Promotion Information

Information
 Campaign summer promo
 Promotion FranchiseePromotion
 Promotion Type Product
 Starts on 11/28/19 12:00 AM
 Runs until 12/31/19 12:00 AM

Franchisees
 1 Franchisee(s) Defined

Locations
 Include Locations 2 attribute(s)

Offers
 1 Associated Offers

Attributes
 1 Attribute(s) Defined
 Promo-Offer Attributes Bypassed

Audience
 1 Defined Audience Groups
 1 Defined Filters

Export Channels
 FranchiseesCustomers:
 Mail, Email, Phone, Associate Channel

Budget
 No budget details defined

Save Options

Next > Previous Next Cancel OK

Figure 5-62: Edit Promotion

During the editing process an offer can be disabled by **clicking the Overflow Menu** and select **Disable**. Disabled offers have a Circle rather than a Dot next to the Offer Name.

Edit Promotion (ID 710)

1 Information 2 Locations 3 Offers 4 Attributes 5 Budget 6 Save Options 7 Review

Select Offers

Included Offers

+ Add Offers Quick Add Add Offer by ID Add

Name and Offer Type	Active Promotions	Offer code	
Line Item Testing 9(ID 6831)	1		
Line Item Discount		Offer code	
Winter Shoes Clearance(ID 7335)	4		
Transaction Discount		Offer code	
Halloween Express Deal(ID 7348)	2		
Fixed Quantity/Price		Offer code	

Promotion Information

Information
 Campaign Strata Promotion
 Promotion Strata Promotion
 Promotion Type Product
 Starts on 12/13/19 12:00 AM
 Runs until 2/29/20 11:59 PM

Franchisees
 All Franchisees defined

Offers
 3 Associated Offers

Attributes
 2 Attribute(s) Defined
 Promo-Offer Attributes Bypassed

Audience
 2 Defined Audience Groups
 1 Group(s) Split into 2
 Channel Mail

Budget
 No budget details defined

Save Options
 No save options to display

Next >

Figure 5-63: Disable an Offer

Disabled offers can be enabled by **clicking the Overflow Menu** and select **Enable**. Enabled offers have a Dot rather than a Circle next to the Offer Name.

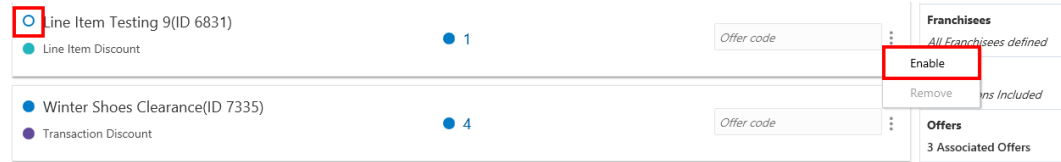


Figure 5-64: Enable an Offer

To edit other areas of the promotion, see [Creating a Coupon Promotion](#) for detailed information.

Duplicating 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. There are three places that a user can find the Duplicate option in order to duplicate a Promotion:
 - Select **Duplicate** under the Action Menu (also known as the Overflow Menu) icon for each individual Promotion on the Promotion Advanced Search screen.
 - Select **Duplicate** in the Overflow Menu on each individual Promotion on the Promotion List screen (which displays in the Promotion Home menu).
 - Select **Duplicate** in the Overflow Menu for the individual Promotion on the Promotion Scorecard.

A copy of Promotion opens in the Promotion Wizard, prompting for the action to perform on the current Promotion.

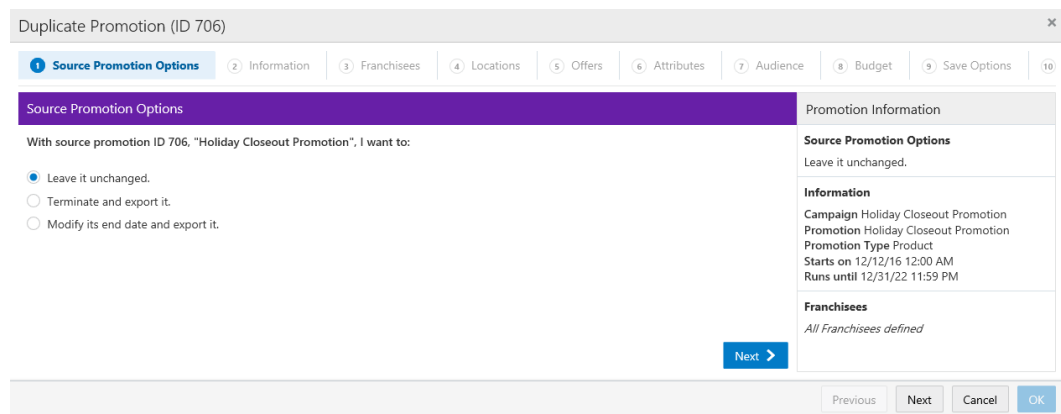


Figure 5-65: Source Promotion Options

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.

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 [Creating a Promotion](#).

Promotion Scorecard

The Promotion Scorecard displays information about the Customer response to a Promotion.

Viewing the Promotion Scorecard

To access the Promotion Scorecard for summary information on a particular promotion, the user can select the link on the Promotion name on either the Promotion List or the Promotion Search results screens.

To access the Promotion List:

1. From the Home menu, click **Tasks**.
2. Click **Campaign**.
3. Click **Promotion Home**. This should default you to the Promotion List

Note: You will need the Promotion Home role in order to see this menu option.

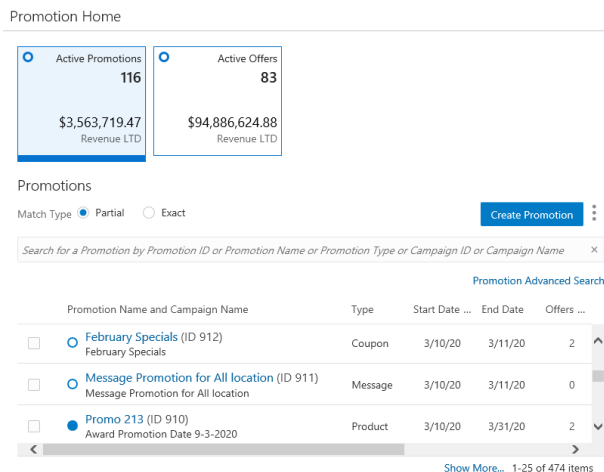


Figure 5-66: Promotion Home

To access the Promotion Search results screen:

1. From the Home menu, click **Tasks**.
2. Click **Campaign**.
3. Click **Promotion Search**.
4. Enter **criteria** in the **Search** panel where you can search for a unique promotion, or click **Search** to retrieve all promotions.

Promotion Search

The screenshot displays the 'Promotion Search' interface. On the left is a 'Search' panel with filters for Promotion ID, Campaign (All), Status (All), Type (All), Exported (All), Attribute Type (All), and Attribute Value. At the bottom of this panel are 'Reset' and 'Search' buttons. The main area on the right shows '474 Promotions Found' with a 'Sort By' dropdown set to 'Last Upda...'. A 'Create Promotion' button is in the top right. Below this is a table of promotions with columns: Promotion Name and Campaign Name, Type, Start Date, and an 'E' column. The table lists several promotions, each with a checkbox and a link to its details. At the bottom right of the table area is a 'Show More...' link and a count '1-25 of 474 items'.

Selection	Promotion Name and Campaign Name	Type	Start Date	E
☐	February Specials (ID 912) February Specials	Coupon	3/10/20	
☐	Message Promotion for All location (ID 911) Message Promotion for All location	Message	3/10/20	
☐	Promo 213 (ID 910) Award Promotion Date 9-3-2020	Product	3/10/20	
☐	Award Promotion Date 9-3-2020 (ID 909) Award Promotion Date 9-3-2020	Award	3/10/20	
☐	Similar Award (ID 908) Similar Award	Award	3/10/20	
☐	Xstore Offer Export Testing (ID 791) Xstore Offer Export Testing	Product	2/19/20	
☐	TargetSegmentExport (ID 847) TargetSegmentExport	Product	2/27/20	
☐	GWT Message Promotion (ID 907)			

Figure 5-67: Promotion Search

5. Select the link on a Promotion name, which then opens the Promotion Scorecard for that promotion.
6. Click the **Revenue LY Metric Tile** to see the following information:

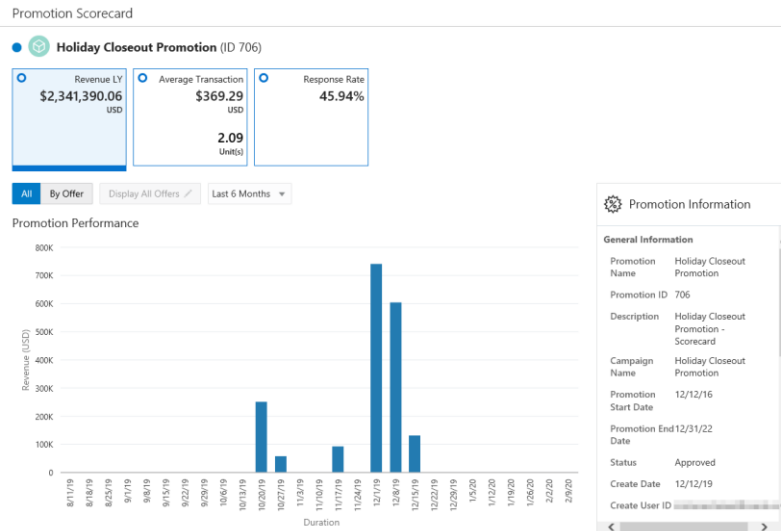


Figure 5-68: Promotion Scorecard – Revenue LY Metric Tile View

The Promotion Scorecard window displays the following sections:

- Title section (displays on all screens) – this contains the name and ID of the Promotion as well as an indicator of whether the promotion is currently active or inactive (a solid Blue Dot represents an Active Promotion while an Empty Dot represents an Inactive Promotion).
- Metric Tiles (displays on all screens) – The following metric tiles are included for the Promotion Scorecard:
 - Revenue LY
 - Average Transaction
 - Response Rate
- Filtering and sorting options for the Promotion Performance graph (displays only on the Revenue LY Metric tile) – The following filter choices allow you to change the display in the Promotion Performance graph, and they include:
 - All – Displays total for All offers combined.
 - By Offer – Displays totals by individual offer.
 - Display all Offers – Filter the offers you wish to display in the Promotion Performance graph. This button is only available when **By Offer** is activated.

Filter Offers To Display ×

4 Offers Displayed

Filters: All Search by Name or ID Search

☐ Offer Details

☐ **Sweater Clearance** (ID 7855)
Data Load for Scorecard
● Transaction Discount Intended Use: Any

☐ **Holiday Clearance** (ID 7856)
Data Load for Scorecard
● Buy X Get X Intended Use: Any

☐ **Jacket Clearance** (ID 7857)
Jacket Clearance for Scorecard
● Line Item Discount Intended Use: Any

☐ **Shoe Clearance** (ID 7858)
Shoe Clearance for Scorecard
● Gift with Purchase Intended Use: Any

Cancel OK

Figure 5-69: Filter Offers to Display

The Filters menu options on the **Filter Offers to Display** popup window will include the type of Offers that exist on the Promotion you are viewing.

- In the **Filter Offers to Display** popup window, you can also search by Name or ID and click **Search** to retrieve the list of offers on this promotion.
- From the list of filtered offers, select the **check box** for each offer you wish to display on the Promotion Performance graph.
- Click **OK** to display the offers in the graph, or click **Cancel** to return to the Scorecard without saving any filters.
- Duration
 - Last Week
 - Last Month (Default)
 - Last 6 Months
 - Last Year
 - LTD – Offer performance for last five years
- The Promotion Performance graph (displays only on the Revenue LY Metric tile) includes the following fields:
 - Revenue
 - Duration
- The Promotion Information panel (displays only on the Revenue LY Metric tile) – See [Promotion Information](#) for more information.

7. Click the **Average Transaction Metric Tile** to see the following information:

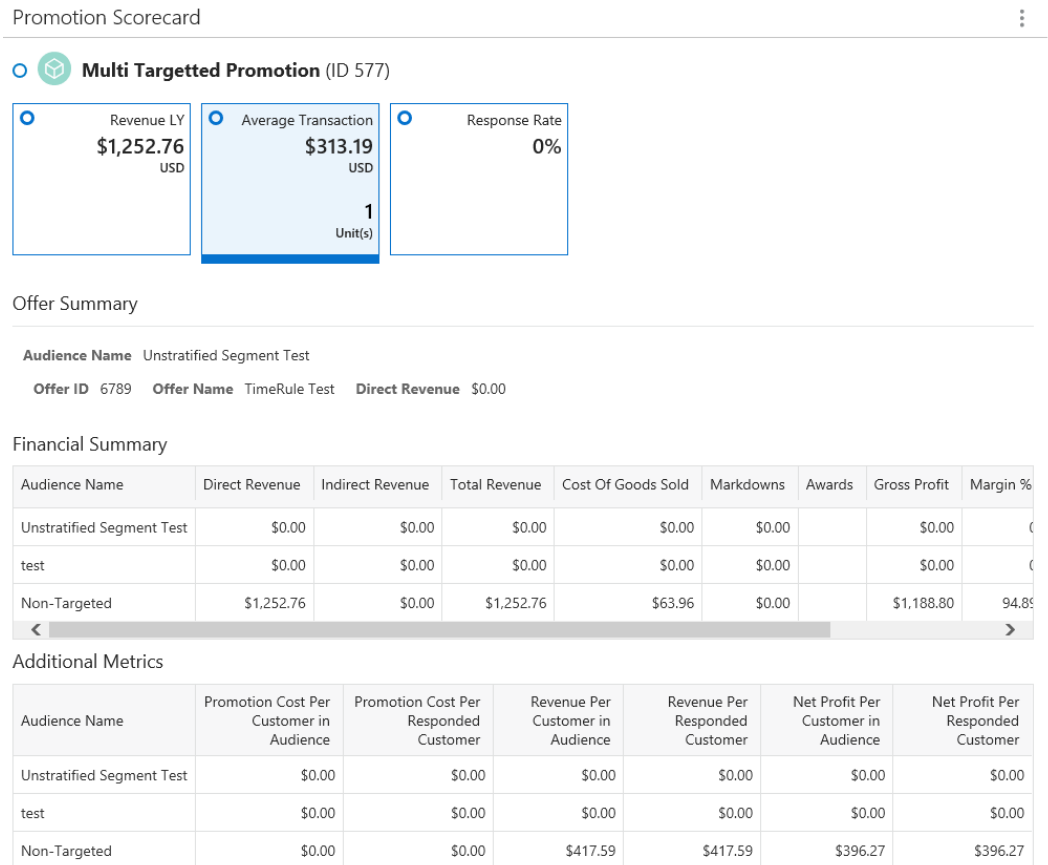


Figure 5-70: Promotion Scorecard – Average Transaction Metric Tile Summary for a Product Promotion

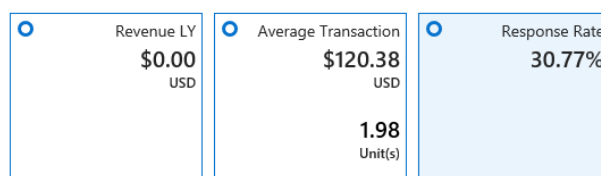
- Offer Summary – data displayed will depend on whether the promotion is a Product or Coupon Promotion. Award and Message type Promotions will not display an Offer Summary section.
 - * Audience Name
 - * Offer ID
 - * Offer Name
 - * Direct Revenue
- Financial Summary
 - * Audience Name
 - * Direct Revenue (Apply to Coupon Promotions Only)
 - Coupon Code
 - Respondents
 - Transactions
 - Value Of Discount
 - Average Sales By Coupon
 - Coupon Revenue
 - Estimated Distribution
 - Response %

- * Indirect Revenue
 - * Total Revenue
 - * Cost of Goods Sold
 - * Markdowns
 - * Awards
 - * Gross Profit
 - * Margin %
 - * Promotion Cost
 - * Net Profit
 - Additional Metrics
 - * **Audience Name** – Name of the group of customers targeted for the Promotion.
 - * **Promotion Cost Per Customer in Audience** – Cost of the Promotion per Customer targeted by the Promotion.
 - * **Promotion Cost Per Responded Customer** – Cost of the Promotion per Customer who responded to the Promotion.
 - * **Revenue Per Customer in Audience** – Revenue received from the Customers who were targeted for the Promotion.
 - * **Revenue Per Responded Customer** – Revenue received from the Customers who responded to the Promotion.
 - * **Net Profit Per Customer in Audience** – Net Profit from the Customers who were targeted for the Promotion.
 - * **Net Profit Per Responded Customer** – Net Profit from the Customers who responded to the Promotion.
8. Click the **Response Rate Metric Tile** to see the following information which can be viewed by All Customers, Active, or Inactive:

Promotion Scorecard



WSDL-TestCase-Promotion-Product (ID 294)



Response Summary for All Customers

Clicked	Undeliverable	Net Targeted	Net Delivery	E-mail Channel Details		Net Response Rate	Response Rate	Award V
				Respondents	Non-Respondents			
0	0	27	0	12	15	0	44.44	
0	0	43	0	4	21	0	9.3	
0	0	7	0	6	1	0	85.71	
0	0	8	0	8	0	0	100	

Figure 5-71: Promotion Scorecard – Response Rate Metric Tile

- **Audience and Segment 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.

Promotion Information

Many of the tabs also include the **Promotion Information** panel on the right side for each tab. This information summarizes what has previously been configured for the Promotion. The tabs that display **Promotion Information** include:

- Information
- Franchisees
- Awards
- Locations
- Offers
- Attributes
- Coupons
- Audience
- Event Definition
- Budget
- Save Options

Promotion Information	
Information	^
Campaign Review Screen Testing Promotion Promotion Review Screen Testing Promotion Promotion Type Product Starts on 12/23/19 12:00 AM Runs until 1/31/20 12:00 AM	
Franchisees	
4 Franchisee(s) Defined	
Locations	
<i>All Locations Included</i>	
Offers	
3 Associated Offers	
Attributes	
2 Attribute(s) Defined Offer !!!!! Offer !!!! Offer!!!!!!!!!!!! offer includes 7 values Transaction Discount Offer offer includes 7 values More..	
Audience	
1 Defined Audience Groups 1 Defined Filters 1 Group(s) Split into 2	
Export Channels	v

Figure 5-72: Promotion Information Panel

Offers

Overview

In Customer Engagement, Offers are price incentives given to the customer. These offers can often be reused in separate Promotions or Card Programs. To facilitate and ease the reuse of existing Offers, a library of Offers can be created in Customer Engagement.

About this Chapter

This chapter contains the following information:

[Offers Quick Search](#)

[Offers Advanced Search](#)

[Creating Offers](#)

[Editing Offers](#)

[Duplicating Offers](#)

[Viewing Offers](#)

[Offer Scorecard](#)

Offer Types

The Offer Type determines the type of incentive provided by the Offer. Customer Engagement has the following Offer Types:

- **Transaction Discount** - A discount is prorated across all items within a transaction.
- **Line Item Discount** - A discount is applied to specific line items within a transaction.
- **Fixed Quantity/Price** - A fixed price is defined for various quantities of qualifying items.
- **Kit** - A defined set of heterogeneous items that, when purchased together, trigger special pricing.
- **Gift with Purchase** - A specific gift item is provided at a discounted price when the selected qualifying items are purchased.
- **Buy X Get X** - The purchase of defined items at regular price allows the customer to receive discounts on the purchase of subsequent quantities of the same items of equal or lesser value.
- **Buy X Get Y** - The purchase of defined items at regular price allows the customer to receive discounts on the purchase of subsequent different items at a discount.
- **Tiered Discount** - A discount is applied to a defined set of items and the amount of the discount can vary at different quantity thresholds.

Intended Use

In Customer Engagement, Offers can be assigned an Intended Use. This indicates the manner in which an Offer is likely to be used.

- **Any (Default)** - An Offer that can be applied as a Product, Coupon, or Entitlement.
- **Coupon** - An Offer that is applied to an item or transaction through a Coupon.
- **Product** - An Offer that is applied directly to an item or transaction.

- **Entitlement** – An Offer that is applied to an item or transaction as an Entitlement for a Customer, including Offers associated with Promotions or Card Programs.

Offers Quick Search

Offers Quick Search displays a list of results as you type in characters in the search box. To use the Offers Quick Search do the following:

1. Click **Tasks**.
2. Click **Campaign**.
3. Click **Promotion Home**.

Note: You will need the Promotion Home role in order to see this menu option.

4. Click the **Active Offers** Metric Tile.



Figure 6-1: Promotion Home Active Offers Tile

5. In the Search for Offers field, enter the Hierarchy Value, Offer ID, Name, Type, or intended use of the offer you want to search for. Click **Partial** to search for Offers that partially match the search text, or click **Exact**, to search for an exact match.

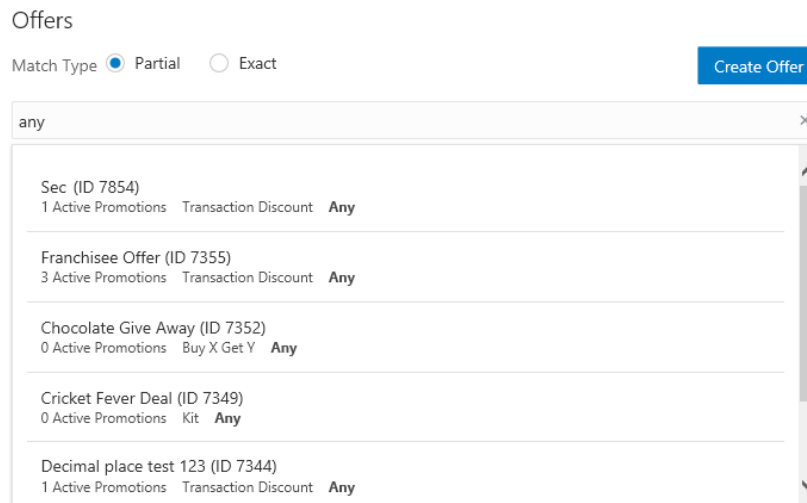


Figure 6-2: Offers

Note: If more than 25 offers match the search criteria, the first 25 offers are displayed. Select **Show More...** at the bottom of the page to display more offers.

6. Click the **Name** which appears as a link in blue for any **Offer** to open the Offer Scorecard for that offer. See [Offer Scorecard](#) for more information. Use the Overflow Menu to Duplicate, Edit, or View the offer. See [Duplicating Offers](#), [Editing Offers](#), or [Viewing Offers](#) for more information.

Promotion Home

Active Promotions
48

\$3,618,058.53
Revenue LTD

Active Offers
61

\$95,308,008.48
Revenue LTD

Offers

Match Type ☒ Partial ☐ Exact [Create Offer](#)

Search for an Offer by Hierarchy value, Offer ID, name, type, or intended use

[Offer Advanced Search](#)

Name and Status	Offer Type	Intended Use	Revenue LTD	
BuyXGetX ShipProduct 2020 (ID 11912) 0 Active Promotions	Buy X Get X	Product	\$0.00	⋮
Gift ShipProduct 2020 (ID 11911) 0 Active Promotions	Gift with Purchase	Product		Duplicate Edit View
Kit ShipProduct 2020 (ID 11910) 0 Active Promotions	Kit	Product		⋮
Fixed ShipProduct 2020 (ID 11909) 0 Active Promotions	Fixed Quantity/Price	Product	\$0.00	⋮
Line ShipProduct 2020 (ID 11908) 0 Active Promotions	Line Item Discount	Product	\$0.00	⋮
Trans ShipProduct 2020 (ID 11907) 0 Active Promotions	Transaction Discount	Product	\$0.00	⋮

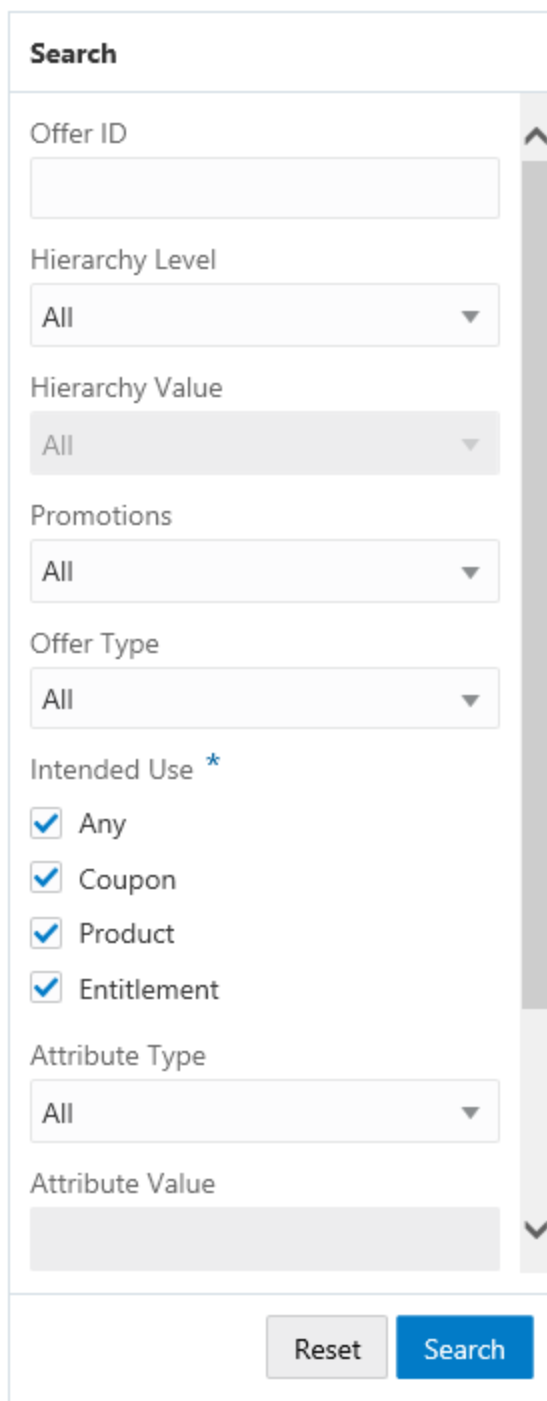
[Show More...](#) 1-25 of 358 items

Figure 6-3: Action Menu Options – Offers Quick Search

Offer Advanced Search

The Offer Advanced search allows you to select more criteria that are not available in the Offer Quick Search box.

Offers Search



The screenshot shows a web interface for searching offers. It features a vertical list of search filters on the left, each with a text input or a dropdown menu. The filters are: Offer ID (text input), Hierarchy Level (dropdown menu with 'All' selected), Hierarchy Value (dropdown menu with 'All' selected), Promotions (dropdown menu with 'All' selected), Offer Type (dropdown menu with 'All' selected), Intended Use (checkboxes for Any, Coupon, Product, and Entitlement, all checked), Attribute Type (dropdown menu with 'All' selected), and Attribute Value (text input). At the bottom right of the filter list are two buttons: 'Reset' and 'Search'.

Search

Offer ID

Hierarchy Level

All

Hierarchy Value

All

Promotions

All

Offer Type

All

Intended Use *

☒ Any

☒ Coupon

☒ Product

☒ Entitlement

Attribute Type

All

Attribute Value

Reset Search

Figure 6-4: Offer Advanced Search Window

The following Search fields are available:

- **Offer ID** - This Text Field searches all the Offers currently present in the application. This will default to blank.

- **Hierarchy Level** - The Merchandise Hierarchy Level, which consists of: Item ID, Department, Sub-Department, Class, Sub-Class, and Style ID. This will default to All. Example: You select Hierarchy level as Department.
- **Hierarchy Value** - The search box included on the top of the list allows you to search for a specific Department. As you begin to type, the application then displays any matching Departments. The field also includes a list of available departments from which to select. This will default to All.
- **Promotions** - To search for Offers which are part of Promotions. This will default to All. Options include:
 - All
 - Active
 - Inactive
- **Offer Type** - Search for Offers by Offer Type, which will be based on available Offer Types configured in the System Configuration module. Following are the current Offer Types. This field will default to All.
 - Buy X Get X
 - Buy X Get Y
 - Fixed Quantity/Price
 - Gift with Purchase
 - Kit
 - Line Item Discount
 - Tiered Discount
 - Transaction Discount
- **Intended Use (Required)** - Search for Offers by the Intended Use assigned. By default, All will be checked.
 - Any
 - Coupon
 - Product
 - Entitlement
- **Attribute Type** - Search the Offer by the Attribute assigned to the Offer. The field will default to All.
- **Attributes Value** - Type-ahead search according to the selected Attribute Type.
- **Created By** - List of Associates who created Offers. This defaults to Everyone.
- **Franchisee ID** - This Text Field searches for Offers by the Franchisee associated with the Offer. The Franchisee ID field will only be visible if the *EnableFranchiseSupport* configuration is enabled and Franchisees are defined. Only Franchisees associated with the user will be displayed. This will default to All.

Searching Offers

Once all the desired information has been entered, click **Search** to see the results. If more than 25 results are returned, you can click the **Show More...** link to show the next 25 offers.

Offers Search

Search

Offer ID

Hierarchy Level

All

Hierarchy Value

All

Promotions

All

Offer Type

Buy X Get Y

Intended Use *

☒ Any

☒ Coupon

☒ Product

☒ Entitlement

Attribute Type

All

Attribute Value

Created By

Everyone

Reset

Search

11 Offers Found

Sort By

Last Update Date

Create Offer

Name and Status	Type	Intended Use	Revenue LTD
Chocolate Give Away (ID 7352) 0 Active Promotions	Buy X Get Y	Any	\$0.00
JS-BatchExporter-Deal2 (ID 4193) 0 Active Promotions	Buy X Get Y	Any	\$0.00
Buy pants get belt half price (ID 5724) 0 Active Promotions	Buy X Get Y	Any	\$0.00
Buy X Get Y 1 (ID 5223) 0 Active Promotions	Buy X Get Y	Product	\$0.00
Deal (ID 1097) 0 Active Promotions	Buy X Get Y	Entitlement	\$0.00
THRESHOLD_SKU_AMT (ID 1066) 0 Active Promotions	Buy X Get Y	Any	\$0.00
WSDL-Deal-7 (ID 2144) 0 Active Promotions	Buy X Get Y	Any	\$0.00
Buy X Get Y (ID 2127) 0 Active Promotions	Buy X Get Y	Any	\$0.00
BOGO_3 (ID 1055) 0 Active Promotions	Buy X Get Y	Any	\$0.00
WSDL-Deal-7 (ID 24) 0 Active Promotions	Buy X Get Y	Any	\$0.00
WSDL-TestCase-ETL-BXGY (ID 10) 0 Active Promotions	Buy X Get Y	Any	\$0.00

Figure 6-5: Offers Search Results

Note: Click **Reset** to clear all fields and return list values to the default selections. You can also click **Search** without entering any criteria to see a complete list of offers.

Sorting Offer Results

The results can be sorted by the following options:

- Last Update Date (Default)
- Offer ID
- Offer Name
- Number of Active Promotions
- Offer Revenue
- Offer Type
- Intended Use

Creating Offers

In Customer Engagement, Offers are price incentives given to the customer. These Offers can often be reused in separate Promotions or Card Programs. To facilitate and reuse existing Offers, a library of Offers can be created in Customer Engagement.

Note: The tabs are dynamic and vary by Offer Type.

To create an offer:

1. Click the **Tasks** icon.
2. Click **Campaign**.
3. Click **Offers Search**. **Results:** The Offers Search window displays.

Offers Search ✕

Offers Search

Search

Offer ID

Hierarchy Level

All ▾

Offers Search

Enter search parameters in the sidebar to search for Offers.

Create Offer

Figure 6-6: Offers Search

4. Click **Create Offer**. This opens the Create Offer Wizard. The Create Offer wizard may contain any of the following tabs, depending on configuration:
 - Information
 - Franchisees
 - Attributes
 - Qualifying Items
 - Award Items or Discount Tiers
 - Shipping Awards
 - Review
5. Enter the following items for the Information Tab:

1 Information 2 Franchisees 3 Attributes 4 Qualifying Items 5 Award Items 6 Review

Offer Definition

Type

Transaction Discount
A discount is prorated across all items within a transaction.

Line Item Discount ✓
A discount applied to specific line items within a transaction.

Fixed Quantity/Price
A fixed price is defined for varying quantities of qualifying items.

Kit
A defined set of heterogeneous items that, when purchased together, trigger special pricing.

Gift with Purchase
A specific gift item is provided at a discounted price when the selected qualifying items are purchased.

Buy X Get X
The purchase of defined items at regular price allows

Description

* Offer Name New Deal 1500014

POS Name New Deal 1500013

* Intended Use Entitlement ▾

Comments

Shipping Award ☐

Options

☐ Include Non-Merchandise Charges

☒ Allow Items to be used in other Offers

☐ Include Redlines

☐ Allow Zero Price

Offer Information

Information

Offer Name New Deal 1500014

Offer Type Line Item Discount

Intended Use Entitlement

Franchisees

All Franchisees defined

Attributes

3 Attribute(s) Defined

Qualifying Items

Subtotal Minimum

Subtotal Maximum

Total Includes 3

Total Excludes 0

Award Items

Maximum Award Amount

Offer Count Limit

Total Includes 3

Total Excludes 0

Next >

Previous Next Cancel OK

Figure 6-7: Information Tab

Note: The read-only Offer Information Panel displays details throughout all tabs of the wizard.

- Type – Select the type of offer from the available options.
 - Transaction Discount
 - Line Item Discount
 - Fixed Quantity/Price
 - Kit
 - Gift with Purchase
 - Buy X Get X
 - Buy X Get Y
 - Tiered Discount
 - Description
 - **Offer Name (Required)** – Name for the offer.
 - **POS Name** – The name for the Offer to be displayed in the POS system.
 - **Intended Use (Required)** – The type of Promotion in which the Offer is to be used.
 - * Any (Default)
 - * Coupon
 - * Product
 - * Entitlement
 - **Comments** – Comments about the Offer.
 - **Shipping Award** – Toggle the switch if available to activate the offer for shipping awards
 - Options
 - **Include Non-Merchandise Charges** – This Check Box determines whether non-merchandise charges are included in the Offer ([DEFAULT] = Unchecked/No).
 - **Allow Items to be used in other Offers** – This check box indicates whether the items used in the Offer can be used again in other Offers applied to a transaction. If Unchecked [DEFAULT], the items can only be used in one offer per transaction. If checked, the items can be used in more than one offer per transaction.
 - **Include Redlines** – This Check Box determines whether Redlines will be included in the Offer ([DEFAULT] = Unchecked/No).
 - **Allow Zero Price** – This Check Box determines whether zero-priced items are included in the Offer ([DEFAULT] = Unchecked/No).
 - Time Rules (Not available if Intended Use selected is **Entitlement**)
- Multiple Time Rules can now be added to Offers. There are two methods** to add Time Rules to an Offer, either:
- Click **+Add Time Rule**.
 - Select the Quick Add option to enter a known Time Rule ID which you wish to associate with this new Offer.
 - Click **Add Time Rule** to Add New or Existing Time Rules.
 - Create **New**

- * Click the **Create New** option.

Add Time Rule [X]

☒ Create New ☐ Add Existing

* Time Rule Name

Day	Start	End	Action
Sunday ☐	* Start 12:00 AM	* End 11:59 PM	Copy to All
Monday ☐	* Start 12:00 AM	* End 11:59 PM	Copy to All
Tuesday ☐	* Start 12:00 AM	* End 11:59 PM	Copy to All
Wednesday ☐	* Start 12:00 AM	* End 11:59 PM	Copy to All
Thursday ☐	* Start 12:00 AM	* End 11:59 PM	Copy to All
Friday ☐	* Start 12:00 AM	* End 11:59 PM	Copy to All
Saturday ☐	* Start 12:00 AM	* End 11:59 PM	Copy to All

Cancel OK

Figure 6-8: Add Time Rule (Create New)

- * Enter a **Time Rule Name** (required).
 - * Select the **Day of the Week** for which the time rules will apply for this Offer.
 - * Enter a **Start Time** for each day selected.
 - * Enter an **End Time** for each day selected.
 - * **Optional:** Click **Copy To All** to copy the settings (Start and End times) from the Day you select, to **all days**.
 - * Click **OK** to accept the new time rule, or **Cancel** to close without saving.
- Add Existing
- * Click the **Add Existing** option.
 - * Enter a **Time Rule Name** or **ID** and click **Search**, or click **Search** to retrieve all existing Time Rules from which to select.

The Add Time Rule (Add Existing) window displays the available time rules to add to an existing offer. Information for each existing time rule includes:

- **Name and ID** – The name and ID of the Time Rule
- **Time Rule In** – The number of offers the Time Rule is already associated with.
- **Days** – The days of the week the Time Rule is active.
- **Start** – The Start time for each corresponding day.
- **End** – The End time for each corresponding day.
- **Add** – Adds a Time Rule.

Add Time Rule

☐ Create New ☒ Add Existing

Search for Time Rule

×

Search

Search Results

Name and ID	Time Rule In	Days	Start	End	Add Time Rule
timerule - 4197 (ID 11)	1 offer(s)	SUNDAY	12:00 AM	11:59 PM	Add
		TUESDAY	12:00 AM	11:59 PM	
		THURSDAY	12:00 AM	11:59 PM	
		FRIDAY	12:00 AM	11:59 PM	
		SATURDAY	12:00 AM	11:59 PM	
rule1530 - 4175 (ID 12)	1 offer(s)	MONDAY	8:00 AM	11:59 PM	Add
		TUESDAY	8:00 AM	11:59 PM	
		WEDNESDAY	8:00 AM	11:59 PM	
		THURSDAY	8:00 AM	11:59 PM	
1234567890123456789012345678 90123456789012 - 5205 (ID 13)	1 offer(s)	SUNDAY	12:00 AM	11:59 PM	Add
		MONDAY	12:00 AM	11:59 PM	
		TUESDAY	12:00 AM	11:59 PM	
		WEDNESDAY	12:00 AM	11:59 PM	

Done

Figure 6-9: Add Time Rule (Add Existing)

- Click **Add** for the desired Time Rule you wish to add to the Offer.
 - Click **Done**.
6. When finished entering all required information on the Information tab, click **Next** to advance to the **Franchisees** tab.

The Franchisees Assignment tab allows you to view or change the Franchisees to which an Offer is assigned. The Franchisee tab will only be visible if the *EnableFranchiseSupport* configuration is enabled, and Franchisees are defined. By default, all franchisees are included on the Offer. If you are assigned to specific franchisees, only those franchisees you are associated to will be shown.

Franchisees

Included Franchisees

Actions ▼

+

×

All Franchisees are included

Next >

Figure 6-10: Franchisees Tab

7. To assign Franchisees:
 - Assigning a Franchisee
 - Click the **Action** Menu, and click **Assign**, or click the **Add (+) icon**. This opens the Add Franchisee window.

Figure 6-11: Assign Franchisee

- Enter part or all of the **Franchisee Name, Franchisee Description, or Location**.

Note: You also have the option to enter no search criteria and click **Search** to retrieve all available franchisees from which to select for assignment.

- Click **Search**.
- Click **Assign All** to assign all the search results, or click **Assign** for a specific franchisee.
- Click **OK** to accept the changes or **Cancel** to close the window without saving.

Note: A confirmation notification appears to confirm the Franchisees has been assigned.

Note: After a Franchisee is assigned, they will appear at the top of the list. The rest of the Franchisees will be ordered by ID.

■ Unassigning A Franchisee

There are two ways to unassign a Franchisee assigned to an Offer.

- In the **Assign Franchisee** window, click **Unassign** on any Franchisees currently assigned to the Offer.

Figure 6-12: Assign Franchisee (Using the Unassign Button)

- If Franchisees are listed on the Franchisee tab in the **Included Franchisees** table, the **row** can be highlighted, then select the **Action Menu**, and then click **Unassign**, or click the **Unassign (X)** icon to remove the associated Franchisee.

Note: A confirmation notification appears to confirm the Franchisees have been deleted.

- When **finished** selecting all Franchisees to assign on the **Franchisee** tab, click **Next** to advance to the **Attributes** tab.

Attributes

Offer Attributes

Name	Value	Description
* Deal Season	Summer ▼	Deal Season
Deal -percent of promo	Number + Add Another	Deal -percent of promo
DEAL_COST	Currency	Estimated Deal Cost
DEAL_CREATED_BY	Character	Deal Created By
DEAL_START_DATE	M/d/yy	Deal Start Date
DEAL_TYPE	(Please select) ▼ + Add Another	Deal Type
NUMBER_OF_ITEMS	Number + Add Another	Estimated # of Deal Items
offer	Character + Add Another	offer
offer_end	Character	Offer End

Next >

Figure 6-13: Attributes Tab

- Enter the following for the **Attributes Tab**. Attributes can be added to the Offer to further distinguish qualifications for the Offer.
 - Select or enter the **configuration values** for each of the required attributes (shown with an asterisk*).
 - Add **values** for any Optional Attributes.
 - Select or enter the **configuration value** for the Attribute.
 - Repeat [Step 9](#) for all optional Attributes you wish added to the Offer.
- When finished defining any **attributes** for the Offer, click **Next**.
 - If the Offer Type is **Transaction Discount**, **Line Item Discount**, **Fixed Quantity/Price**, **Gift with Purchase**, or **Buy X Get X**, continue with [Step 11](#).
 - If the Offer Type is **Kit** or **Buy X Get Y**, continue with [Step 13](#).
 - If the Offer Type is **Tiered Discount**, continue with [Step 15](#).
- Enter the following for the **Qualifying Items Tab**. The Qualifying Items Tab is used to define which Items are included and excluded in the Offer. The Qualifying Items Tab has the following sections for **Transaction Discount**, **Line Item Discount**, **Fixed Quantity/Price**, **Gift with Purchase**, and **Buy X Get X**:

Figure 6-14: Qualifying Items Tab

- Parameters – Enter the following parameters. The following parameters are dynamic and will vary based on the type of offer selected.
 - **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 be set.

Note: The options available will vary, depending upon the Offer Type selected.

 - * Exact
 - * Minimum
 - **Threshold Type** – The type of threshold.
 - * Amount
 - * Quantity
 - **Threshold (Required)** – The amount of the threshold

Figure 6-15: Define Qualifying Items

There are two methods to import items into the Qualifying Items tab:

- To import items from an existing offer:

- Click **Import From Existing Offers** then enter the following information:
 - * Enter **some** or **all** of the **Offer Name**, or **Offer Type** in the **Search for Offer** field. When searching by **Offer ID** the user must enter the **exact ID**.
 - * Click **one or more** of the **Import** check boxes for the **Offers** you would like to import.
 - * Click **OK** to import the Offer.

- To import items in a CSV file:
 - Click the **Actions Menu** and select **Import from CSV**.
 - **Drag and Drop** the File
 - Click **OK**

OR

- Click **Upload**. This displays the file selection menu where you can import a set of items in a comma-separated values (CSV) format.
- Select a file from the **File Explorer**.
- Click **Open**.
- Click **OK**.

Note: When the file has been uploaded, the name of the file is displayed with an (X) that allows you to remove the file.

- Define **Qualifying Items**
 - **Included**
 - * Use the Quick Add option to enter a known Item ID which you wish to associate with this new Offer.
 - * Click **Add**.

OR

- * Click the **Actions Menu** and select **Add Item Rule**.
- Or
 - * Click **+Add Item Rule**.
 - **Include All Items** – This enables you to use Attribute Filters for all items.

Figure 6-16: Add Item Rule (Include All Items)

- Select either **Match Any** or **Match All**.
- Click the desired filter from the list of choices located in the left pane. Once selected, any associated values for the attribute will appear in the right pane.
- Select or deselect from the available choices in the pane to the right of the selected attribute filter. Attributes like Season or Color or Brand will default with ALL selected (checked). You can deselect All for that attribute by unchecking the checkmark in the top check box. Then you can sort through the list and choose specific attributes by selecting the associated check box.
- Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window **without** adding the item rule.
- **Include By Hierarchy** – There are two ways to search for items in the Include by Hierarchy window.
 - Select one of the Hierarchy tabs (Department, Class, for example) and click **Search** to retrieve all associated hierarchies.
 - Select one of the Hierarchy tabs and enter the ID, Name, or Description in the field, and click **Search** to retrieve your refined search criteria. Results appear in the left pane of the window.

Add Item Rule (Include)

☐ Include All Items
 ☒ Include By Hierarchy
 ☐ Specific Items

Select Items By Hierarchy

Department (1) SUB_DEPT CLASS SUB_CLASS STYLE_ID

Search by ID, Name or Description

- ☐ Department Name, ID and Description
- ☒ Accessory Department (ID 925)
Accessory Department
- ☐ Appliance Department (ID 800)
Appliance Department
- ☐ Beauty/Fragrance Department (ID 975)
Beauty/Fragrance Department
- ☐ Bridal Department (ID 850)
Bridal Department
- ☐ Clothing Department (ID 900)
Clothing Department
- ☐ Coffee Shop (ID 741)
Coffee Department
- ☐ Garden Department (ID 825)
Garden Department
- ☐ Shoe Department (ID 950)
Shoe Department

Assign Attribute Filters to 1 Selected Hierarchies

Brand
Include All (5)

Season
Include All (3)

Pricing
Include All

Color
Include All (9)

Color

- ☒ All Colors
- ☒ Black
- ☒ Bronze
- ☒ Brown
- ☒ Gold
- ☒ Navy
- ☒ Red
- ☒ Silver
- ☒ Tan
- ☒ White

Figure 6-17: Add Item Rule (Include by Hierarchy)

- Select **Match Any** or **Match All**.
 - Click the desired filter from the list of choices located in the center pane. Once selected, any associated values for the attribute will appear in the right pane.
 - Select or deselect from the available choices in the pane to the right of the selected attribute filter.
 - Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.
- Specific Items
 - Enter the ID or Description of the Item.
 - Click **Search**.

Add Item Rule (Include)

☐ Include All Items
 ☐ Include By Hierarchy
 ☒ Specific Items

0 Items Selected

sweater

- ☐ Item Description and ID
- ☐ Boys Argyle Sweater (ID 210009985)
- ☐ Boys Argyle Sweater (ID 210010026)
- ☐ Boys Argyle Sweater (ID 210010089)
- ☐ Boys Argyle Sweater (ID 210010090)
- ☐ Boys Argyle Sweater (ID 210010409)

Figure 6-18: Add Item Rule (Specific Items)

Select from the **available choices**, in **two** ways:

- * Select the **Check box** to the **left** of the **Item Description and ID** fields in the header row, thus choosing **all** the items.
- * Randomly check the check box to the **left** of the **individual** items you wish to **add** to the Offer.
- * Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values, or click **Cancel** to close the window without adding the item rule.

Note: To exclude items, click the Exclude Items link, see [Figure 6-15](#) and follow the same process as [Defining Qualifying Items](#) above.

12. When finished defining items to include and/or exclude for the Offer, click **Next**.

- If the Offer Type is **Transaction Discount, Line Item Discount**, or **Fixed Quantity/Price**, continue with [Step 17](#), Award Items tab.
- If the Offer Type is **Gift with Purchase**, continue with [Step 21](#), Award Items tab.
- If the Offer Type is **Buy X Get X**, continue with [Step 26](#), Award Items tab.

13. Enter the following for the **Qualifying Items Tab**. The Qualifying Items Tab is used to define which Items are included and excluded in the Offer. The Qualifying Items Tab has the following sections for **Kit** and **Buy X Get Y**:

Define Qualifying Items

Parameters Import From Existing Offers

Subtotal Minimum Subtotal Maximum

Define Qualifying Items 0 Items Included in 1 Sets

Set 1 Threshold Style Minimum Threshold Type Quantity * Threshold ⋮

Included Exclude Items

Actions Quick Add Add by ID Add

No Items Included

+ Add Item Rule

[+Add Another Set](#)

Figure 6-19: Qualifying Items Tab for Kit and Buy X Get Y

- Parameters – Enter the following parameters. The following parameters are dynamic and will vary based on the type of offer selected.
 - **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.
- Define Qualifying Items
 - **Threshold Style** – The style of threshold to be set.
 - * Exact

- * Minimum
- **Threshold Type** – The type of threshold.
- * Amount
- * Quantity
- **Threshold (Required)** – The amount of the threshold

Note: For KIT and BUY_X_GET_Y offers, the Threshold Style, Threshold Type, and Threshold fields will appear in the Define Qualifying Items section. In these Offer Types, qualifying Items are organized in **Sets**. Each Set has an Include Item and Exclude Item section which contains one or more Items.

Define Qualifying Items

Parameters

Subtotal Minimum

Subtotal Maximum

Define Qualifying Items 🎯 0 Items Included in 1 Sets

Set 1

Threshold Style Minimum

Threshold Type Quantity

* Threshold 1

⋮

Included

Actions ▾

No Items Included

[Exclude Items](#)

+Add Another Set

Figure 6-20: Define Qualifying Items

There are two methods to import items into the Qualifying Items tab:

- To import items from an existing offer:
 - Click **Import From Existing Offers** then enter the following information:
 - * Enter **some** or **all** of the **Offer Name**, or **Offer Type** in the **Search for Offer** field. When searching by **Offer ID** the user must enter the **exact ID**.
 - * Click **one or more** of the **Import** check boxes for the **Offers** you would like to import.
 - * Click **OK** to import the Offer.
 - To import items in a CSV file:
 - Click the **Actions Menu** and select **Import from CSV**.
 - **Drag and Drop** the File
 - Click **OK**
- OR
- Click **Upload**. This displays the file selection menu where you can import a set of items in a comma-separated values (CSV) format.
 - Select a file from the **File Explorer**.

- Click **Open**.
- Click **OK**.

Note: When the file has been uploaded, the name of the file is displayed with an (X) that allows you to remove the file.

- Define **Qualifying Items**

- **Included**

- * Use the **Quick Add** option to enter a known **Item ID** which you wish to associate with this new Offer.
- * Click **Add**.

OR

- * Click the **Actions Menu** and select **Add Item Rule**.

Or

- * Click **+Add Item Rule**.
 - **Include All Items** – This enables you to use Attribute Filters for all items.

Figure 6-21: Add Item Rule (Include All Items)

- Select either **Match Any** or **Match All**.
- Click the desired filter from the list of choices located in the left pane. Once selected, any associated values for the attribute will appear in the right pane.
- Select or deselect from the available choices in the pane to the right of the selected attribute filter. Attributes like Season or Color or Brand will default with ALL selected (checked). You can deselect All for that attribute by unchecking the checkmark

- in the top check box. Then you can sort through the list and choose specific attributes by selecting the associated check box.
 - Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window **without** adding the item rule.
- **Include By Hierarchy** – There are two ways to search for items in the Include by Hierarchy window.
 - Select one of the Hierarchy tabs (Department, Class, for example) and click **Search** to retrieve all associated hierarchies.
 - Select one of the Hierarchy tabs and enter the ID, Name, or Description in the field, and click **Search** to retrieve your refined search criteria. Results appear in the left pane of the window.

Add Item Rule (Include)

☐ Include All Items
 ☒ Include By Hierarchy
 ☐ Specific Items

Select Items By Hierarchy

Department (1) | SUB_DEPT | CLASS | SUB_CLASS | STYLE_ID

Search by ID, Name or Description

- ☐ Department Name, ID and Description
- ☒ Accessory Department (ID 925)
Accessory Department
- ☐ Appliance Department (ID 800)
Appliance Department
- ☐ Beauty/Fragrance Department (ID 975)
Beauty/Fragrance Department
- ☐ Bridal Department (ID 850)
Bridal Department
- ☐ Clothing Department (ID 900)
Clothing Department
- ☐ Coffee Shop (ID 741)
Coffee Department
- ☐ Garden Department (ID 825)
Garden Department
- ☐ Shoe Department (ID 950)
Shoe Department

Assign Attribute Filters to 1 Selected Hierarchies

☒ Match Any
 ☐ Match All

Brand
Include All (5)
 Season
Include All (3)
 Pricing
Include All
Color
Include All (9)

☒ All Colors
☒ Black
☒ Bronze
☒ Brown
☒ Gold
☒ Navy
☒ Red
☒ Silver
☒ Tan
☒ White

Figure 6-22: Add Item Rule (Include by Hierarchy)

- Select **Match Any** or **Match All**.
 - Click the desired filter from the list of choices located in the center pane. Once selected, any associated values for the attribute will appear in the right pane.
 - Select or deselect from the available choices in the pane to the right of the selected attribute filter.
 - Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.
- Specific Items

- Enter the ID or Description of the Item.
- Click **Search**.

Figure 6-23: Add Item Rule (Specific Items)

Select from the **available choices**, in **two** ways:

- * Select the **Check box** to the **left** of the **Item Description and ID** fields in the header row, thus choosing **all** the items.
- * Randomly check the check box to the **left** of the **individual** items you wish to **add** to the Offer.
- * Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values, or click **Cancel** to close the window without adding the item rule.

Note: To exclude items, click the Exclude Items link, see [Figure 6-20](#) and follow the same process as [Defining Qualifying Items](#) above.

14. When finished defining Qualifying Items for the Offer, click **Next**.

- If the Offer Type is **Kit**, continue with [Step 19](#), Award Items tab.
- If the Offer Type is **Buy X Get Y**, continue with [Step 28](#), Award Items tab.

15. Enter the following for the **Qualifying Items Tab**. The Qualifying Items Tab is used to define which Items are included and excluded in the Offer. The Qualifying Items Tab has the following sections for **Tiered Discount**:

Define Qualifying Items

Parameters Import From Existing Offers

Subtotal Minimum Subtotal Maximum Threshold Style Tiered Threshold Type Quantity Discount Type Percent Off

Define Qualifying Items 0 Items Included

Included Exclude Items

Actions Quick Add Add by ID Add

No Items Included

+ Add Item Rule

Figure 6-24: Qualifying Items Tab for Tiered Discount

- **Parameters** – Enter the following parameters. The following parameters are dynamic and will vary based on the type of offer selected.
 - **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 be set.
 - * Tiered
 - **Threshold Type** – The type of threshold.
 - * Amount
 - * Quantity
 - **Discount Type** – The type of discount.
 - * **Percent Off** – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
 - * **Amount Off** – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.
 - * **Override Price** – The new price for the qualifying item. The Discount Value field determines the new price.

Define Qualifying Items

Parameters Import From Existing Offers

Subtotal Minimum Subtotal Maximum Threshold Style Tiered Threshold Type Quantity Discount Type Percent Off

Define Qualifying Items 0 Items Included

Included Exclude Items

Actions Quick Add Add by ID Add

No Items Included

+ Add Item Rule

Figure 6-25: Define Qualifying Items

There are two methods to import items into the Qualifying Items tab:

- To import items from an existing offer:
 - Click **Import From Existing Offers** then enter the following information:
 - * Enter **some** or **all** of the **Offer Name**, or **Offer Type** in the **Search for Offer** field. When searching by **Offer ID** the user must enter the **exact ID**.
 - * Click **one or more** of the **Import** check boxes for the **Offers** you would like to import.
 - * Click **OK** to import the Offer.

There are two methods to import items into the Qualifying Items tab:

- To import items from an existing offer:
 - Click **Import From Existing Offers** then enter the following information:
 - * Enter **some** or **all** of the **Offer Name**, or **Offer Type** in the **Search for Offer** field. When searching by **Offer ID** the user must enter the **exact ID**.
 - * Click **one or more** of the **Import** check boxes for the **Offers** you would like to import.
 - * Click **OK** to import the Offer.
- To import items in a CSV file:
 - Click the **Actions Menu** and select **Import from CSV**.
 - **Drag and Drop** the File
 - Click **OK**

OR

- Click **Upload**. This displays the file selection menu where you can import a set of items in a comma-separated values (CSV) format.
- Select a file from the **File Explorer**.
- Click **Open**.
- Click **OK**.

Note: When the file has been uploaded, the name of the file is displayed with an (X) that allows you to remove the file.

- Define **Qualifying Items**
 - **Included**
 - * Use the Quick Add option to enter a known Item ID which you wish to associate with this new Offer.
 - * Click **Add**.

OR

- * Click the **Actions Menu** and select **Add Item Rule**.
- Or
 - * Click **+Add Item Rule**.
 - **Include All Items** – This enables you to use Attribute Filters for all items.

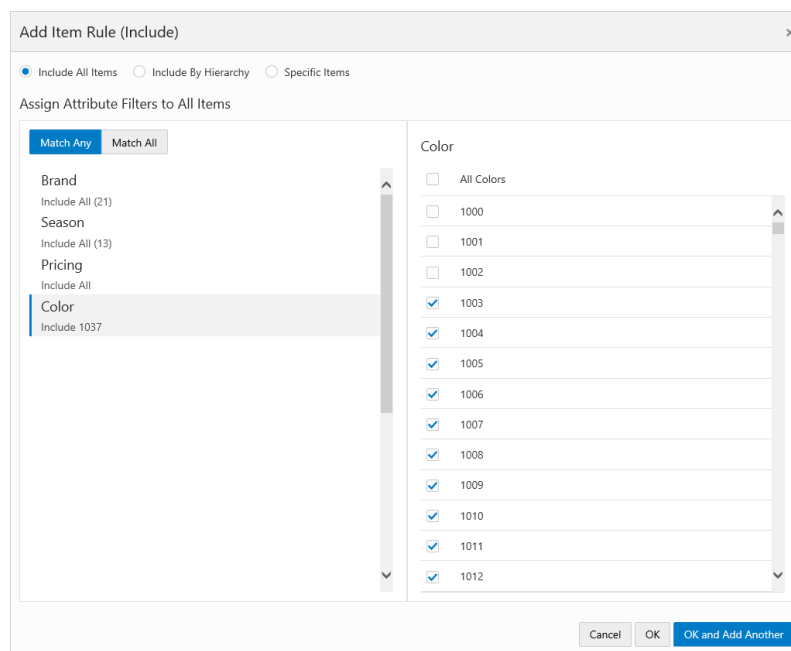


Figure 6-26: Add Item Rule (Include All Items)

- Select either **Match Any** or **Match All**.
- Click the desired filter from the list of choices located in the left pane. Once selected, any associated values for the attribute will appear in the right pane.
- Select or deselect from the available choices in the pane to the right of the selected attribute filter. Attributes like Season or Color or Brand will default with ALL selected (checked). You can deselect All for that attribute by unchecking the checkmark in the top check box. Then you can sort through the list and choose specific attributes by selecting the associated check box.
- Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window **without** adding the item rule.
- **Include By Hierarchy** – There are two ways to search for items in the Include by Hierarchy window.
 - Select one of the Hierarchy tabs (Department, Class, for example) and click **Search** to retrieve all associated hierarchies.
 - Select one of the Hierarchy tabs and enter the ID, Name, or Description in the field, and click **Search** to retrieve your refined search criteria. Results appear in the left pane of the window.

Add Item Rule (Include)

☐ Include All Items
 ☒ Include By Hierarchy
 ☐ Specific Items

Select Items By Hierarchy

Department (1) SUB_DEPT CLASS SUB_CLASS STYLE_ID

Search by ID, Name or Description

- ☐ Department Name, ID and Description
- ☒ Accessory Department (ID 925)
Accessory Department
- ☐ Appliance Department (ID 800)
Appliance Department
- ☐ Beauty/Fragrance Department (ID 975)
Beauty/Fragrance Department
- ☐ Bridal Department (ID 850)
Bridal Department
- ☐ Clothing Department (ID 900)
Clothing Department
- ☐ Coffee Shop (ID 741)
Coffee Department
- ☐ Garden Department (ID 825)
Garden Department
- ☐ Shoe Department (ID 950)
Shoe Department

Assign Attribute Filters to 1 Selected Hierarchies

Brand Include All (5)
 Season Include All (3)
 Pricing Include All
Color Include All (9)

Color

- ☒ All Colors
- ☒ Black
- ☒ Bronze
- ☒ Brown
- ☒ Gold
- ☒ Navy
- ☒ Red
- ☒ Silver
- ☒ Tan
- ☒ White

Figure 6-27: Add Item Rule (Include by Hierarchy)

- Select **Match Any** or **Match All**.
 - Click the desired filter from the list of choices located in the center pane. Once selected, any associated values for the attribute will appear in the right pane.
 - Select or deselect from the available choices in the pane to the right of the selected attribute filter.
 - Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values. Click **Cancel** to close the window without adding the item rule.
- Specific Items
- Enter the ID or Description of the Item.
 - Click **Search**.

Add Item Rule (Include)

☐ Include All Items
 ☐ Include By Hierarchy
 ☒ Specific Items

0 Items Selected

sweater

- ☐ Item Description and ID
- ☐ Boys Argyle Sweater (ID 210009985)
- ☐ Boys Argyle Sweater (ID 210010026)
- ☐ Boys Argyle Sweater (ID 210010089)
- ☐ Boys Argyle Sweater (ID 210010090)
- ☐ Boys Argyle Sweater (ID 210010409)

Figure 6-28: Add Item Rule (Specific Items)

Select from the **available choices**, in **two** ways:

- * Select the **Check box** to the **left** of the **Item Description and ID** fields in the header row, thus choosing **all** the items.
- * Randomly check the check box to the **left** of the **individual** items you wish to **add** to the Offer.
- * Click **OK** to add the item rule to the Offer or click **OK and Add Another** to add another attribute and values, or click **Cancel** to close the window without adding the item rule.

Note: To exclude items, click the Exclude Items link, see [Figure 6-25](#) and follow the same process as [Defining Qualifying Items](#) above.

16. When finished defining Qualifying Items for the Offer, click **Next**.

- If the Offer Type is **Tiered Discount**, continue with [Step 30](#), Discount Tiers.

17. Enter the following for the **Award Items** tab.

The **Award Items** tab is used to define which Items are **included** and **excluded** in the **Offer**, as well as to define the **rules** for the Award type and amount. The Award Items Tab has the following sections for a **Transaction Discount**, **Line Item Discount**, or **Fixed Quantity/Price**:

Figure 6-29: Define Award Items Tab

- **Parameters**
 - **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
 - **Maximum Award Amount** – The maximum currency amount of the award.
 - **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 [DEFAULT] for no limit.
 - **Discount Type** – The type of discount.
 - * **Percent Off** – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
 - * **Amount Off** – The discount is a fixed amount off of the qualifying items. The Discount Value field determines the amount.
 - **Discount Value** – The amount of the discount.
 - **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.

- **Award application method** – Determines how a discount is applied to the award Items. These options are **only** enabled for **Amount Off** discount types, and **only** if the **Intended Use** for the Offer is **not** Entitlement. This method has 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.
 - Define Award Items
 - **Included Items** - Lists the items that are included as Award Items.
 - **Excluded Items** - Lists the items that are excluded as Award Items.
18. When finished defining Award Items for the Offer, click **Next**.
- If the Offer Type is **Transaction Discount**, **Line Item Discount**, or **Fixed Quantity/Price**, continue to [Step 32](#), Shipping Awards tab.
19. Enter the following for the **Award Items** tab:

The **Award Items** tab is used to define which Items are **included** and **excluded** in the **Offer**, as well as to define the **rules** for the Award type and amount. The Award Items Tab has the following sections for **Kit**:

Figure 6-30: Define Award Items - Kit

- Parameters
 - **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
 - **Maximum Award Amount** – The maximum currency amount of the award.
 - **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 [DEFAULT] for no limit.
- Define Award Items
 - **Discount Type** – The type of discount.
 - * **Percent Off** – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.

- * **Amount Off** – The discount is a fixed amount off of the qualifying items. 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.
- **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.
- **Award application method** – Determines how a discount is applied to the award Items. These options are **only** enabled for **Amount Off** discount types, and **only** if the **Intended Use** for the Offer is **not** Entitlement. This method has 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.
- **Included Items** - Determines the items that are included as Award Items for all Sets.
- **Excluded Items** - Determines the items that are excluded as Award Items for all Sets.

20. When finished defining Award Items for the Offer, click **Next**.

- For Kit, continue to [Step 32](#), Shipping Awards tab.

21. Enter the following for the **Award items** tab.

The Award Items tab is used to define which Items are included and excluded in the Offer, as well as to define the rules for the Award type and amount. The Award Items Tab has the following sections for a **Gift with Purchase**.

The screenshot shows the 'Define Award Items' form. At the top is a blue header 'Define Award Items'. Below it is the 'Parameters' section with fields for Priority (dropdown), Maximum Award Amount (text input), Offer Count Limit (text input with up/down arrows), Discount Type (dropdown set to 'Percent Off'), Discount Value (text input), and Maximum Quantity (text input with up/down arrows). Below these are two radio buttons: 'Prorate award value across qualifying items' (unselected) and 'Issue award to each qualifying item' (selected). The 'Define Gift Item' section has a target icon and '0 Items Included'. Below this is a large light blue box labeled 'Included' containing an 'Actions' dropdown, 'Quick Add' button, 'Add by ID' text input, and an 'Add' button. At the bottom of this box is the text 'No Items Included' and a '+ Add Gift Item' button. A blue 'Next >' button is at the bottom right of the form.

Figure 6-31: Define Award Items – Gift with Purchase

- Parameters
 - **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
 - **Maximum Award Amount** – The maximum currency amount of the award.

- **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer is not Entitlement. Set to 0 [DEFAULT] for no limit.
 - **Discount Type** – The type of discount.
 - * **Percent Off** – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
 - * **Amount Off** – The discount is a fixed amount off of the qualifying items. 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.
 - **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.
 - **Award application method** – Determines how a discount is applied to the award Items. These options are **only** enabled for **Amount Off** discount types, and **only** if the **Intended Use** for the Offer is **not** Entitlement. This method has 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.
 - Define Gift Items
- There are three methods for adding Gift Items to an offer, using the following options:
- **+ Add Gift item**
 - **Actions Menu** and then selecting **Add Gift Item** to display the Add Gift Item window, where you can search for items
 - Entering the **exact item ID** in the **Quick Add** field:
 - **Specific Gift Items**
 - * Enter the ID or Description of the Gift Item.
 - * Click **Search**.

Define Gift Item
 **0 Items Included**

Included

Actions ▼
 Quick Add

No Items Included

 Add Gift Item

Next >

Figure 6-32: Define Gift Item

22. Select **one** check box to the **left** of the **individual** item you wish to add to the Offer.

Figure 6-33: Add Gift Item

Note: You may only add **one** Gift Item to the offer.

23. Click **OK** to add the Gift Item to the Offer, or click **Cancel** to close the window without saving.

Define Gift Item

1 Items Included

Figure 6-34: Included Gift Item Overflow Menu (Remove)

24. **Optional:** Click the **Overflow** menu, then click **Remove** to remove a Gift Item and search for a different Gift Item.
25. When finished defining Award Items for the Offer, click **Next**.
- For Gift with Purchase, continue to [Step 32](#), Shipping Awards tab.
26. Enter the following for the **Award Items** tab.

The **Award Items** tab is used to define which Items are **included** and **excluded** in the **Offer**, as well as to define the **rules** for the Award type and amount. The Award Items Tab has the following sections for **Buy X Get X**:

Figure 6-35: Define Award Items Tab – Buy X Get X

- **Parameters**
 - **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
 - **Maximum Award Amount** – The maximum currency amount of the award.
 - **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer 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.
 - * **Percent Off** – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
 - * **Amount Off** – The discount is a fixed amount off of the qualifying items. 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.
 - **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.
 - **Award application method** – Determines how a discount is applied to the award Items. These options are **only** enabled for **Amount Off** discount types, and **only** if the **Intended Use** for the Offer is **not** Entitlement. This method has 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.
- **Define Award Items**
 - **Included Items** – Lists the items that are included as Award Items.
 - **Excluded Items** – Lists the items that are excluded as Award Items.

27. When finished defining Award Items for the Offer, click Next.

- For Buy X Get X, continue to [Step 32](#), Shipping Awards tab.

28. Enter the following for the **Award Items** tab.

The **Award Items** tab is used to define which Items are **included** and **excluded** in the **Offer**, as well as to define the **rules** for the Award type and amount. The Award Items Tab has the following sections for **Buy X Get Y**:

Figure 6-36: Define Award Items Tab – Buy X Get Y

- **Parameters**
 - **Priority** – If more than one Offer can be applied to a Transaction, this selection menu determines the priority given to the Offer.
 - **Maximum Award Amount** – The maximum currency amount of the award.
 - **Offer Count Limit** – The maximum number of times the Offer can be applied to the same transaction. Available only if the Intended Use for the Offer 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.
 - * **Percent Off** – The discount is a certain percentage off of the qualifying items. The Discount Value field determines the percentage.
 - * **Amount Off** – The discount is a fixed amount off of the qualifying items. 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.
 - **Maximum Quantity** – Maximum quantity of the matching items that can be used to satisfy the item rule.
 - **Award application method** – Determines how a discount is applied to the award Items. These options are **only** enabled for **Amount Off** discount types, and **only** if the **Intended Use** for the Offer is **not** Entitlement. This method has 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.

- Define Award Items
 - **Included Items** - Lists the items that are included as Award Items.
 - **Excluded Items** - Lists the items that are excluded as Award Items.

Note: You are required to Define Award Items for Buy X Get Y, see [Step 13, Defining Qualifying Items](#) for more information on defining the Award Items.

29. When finished defining Award Items for the Offer, click Next.

- For Buy X Get Y continue to [Step 32, Shipping Awards](#) tab.

30. Enter the following information for the **Discount Tiers** Tab.

A discount is applied to a defined set of items, where the amount or percent of the discount depends on the quantity or amount of the items defined in the threshold.

Note: At least two tiers must be defined for Tiered Discount Offer.

Define Tiered Discount

Parameters

☐ Prorate award value across qualifying items
 ☒ Issue award to each qualifying item

Define Tiered Discount

Tier	Threshold Quantity	Discount Percent
1	Buy 3	Get 25
2	Buy 6	Get 40

[+ Add Another](#)

[Next >](#)

Figure 6-37: Define Tiered Discount

- Parameters
 - 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 in the Buy field. This field is only displayed when the discount type previously selected is Percent Off or Amount Off.
 - For - The price applied to the items in the Buy field. This field is only displayed if the discount type previously selected is Price Override.
- Click **+ Add Another** to add another tier or click the **Remove Tier** icon to remove a tier from the offer.

31. When finished defining Tiered Discounts for the Offer, click **Next** to advance [Step 48](#) the **Review** tab.

32. Enter the following information for the **Shipping Awards** Tab.

The screenshot shows the 'Shipping Awards' tab in a 'Create Offer' application. At the top, there's a navigation bar with tabs: Information, Franchisees, Attributes, Qualifying Items, Award Items, Shipping Awards (active), and Review. Below the navigation bar, the 'Shipping Awards' section contains three main panels: 'Shipping Method', 'Ship To Country', and 'Qualifying Pay Type'. Each panel has a 'Select All' checkbox and a list of options with checkboxes. The 'Shipping Method' panel lists: Ground, Parcel Post, Next Day, Second Day, and Overnight - 10AM. The 'Ship To Country' panel lists: US and CA. The 'Qualifying Pay Type' panel lists: 2 - Visa, 3 - Mastercard, and 4 - Amex. Below these panels, there's a 'Continental USA Only' checkbox. The 'Sectional Center Facility' section has 'From' and 'To' input fields. The 'Awards' section has 'Shipping Charge Type' and 'Override Shipping Method' dropdown menus. The 'Discount' section has a 'Percent Off' dropdown and a 'Charge Code' dropdown. A 'Next' button is located at the bottom right.

Figure 6-38: Shipping Awards Tab

- **Shipping Method** – This table will list the shipping methods that will qualify the shipping award. Select the shipping methods eligible for the Offer (Optional).
- **Ship To Country** – This table specifies the countries which make eligible the shipping award on the Offer. Select the Ship to Countries for the Offer (Optional).
- **Qualifying Pay Type** – This table lists the payment types required on the transaction to qualify for the shipping award. Select the Pay Types for the Offer (Optional).
- **Continental US Only** – If the Continental USA Only check box is checked, the Offer applies only to states in the continental USA (excluding Hawaii and Alaska).
- **Sectional Center Facility From** – This represents the first three positions of the postal code, for the sectional center facility. This will be the starting point of the range of postal code the shipment destination must fall under to qualify for the Shipping award (Optional).
- **Sectional Center Facility To** – This represents the first three positions of the postal code, for the sectional center facility. This will be the ending point of the range of postal code the shipment destination must fall under to qualify for the Shipping award (Optional).
- **Awards**
 - **Shipping Charge Type** – Customer defined Charge Types that qualify for the shipping award discount, such as, Base or Upgrade.
 - **Override Shipping Method** – If a Shipping Method was defined, selecting this check box dictates overriding that shipping method for this new method. These codes are defined in a Configuration called Shipping Method Codes.

- **Discount** – Select the type of shipping discount to apply.
 - * **Percent Off** – Apply a percentage discount, specified in the Discount Value, to the shipping charge. For example, 40% off shipping.
 - * **Amount Off** – Apply a discount amount, specified in the Discount Value, to the shipping charge. For example, \$5.00 off shipping.
 - * **Override Price** – Override the shipping price to the Discount Value. For example, \$2.99 shipping.
 - **Charge Code** – Select from the list to select a code that will appear on the order when using the Amount off or Percent Off (Optional).
33. When finished defining the Shipping Award rules for the Offer, click **Next**.
- If the Offer Type is Transaction Discount, continue with [Step 34](#), the Review tab.
 - If the Offer Type is Line Item Discount, continue with [Step 36](#), the Review tab.
 - If the Offer Type is Fixed Quantity/Price, continue with [Step 38](#), the Review tab.
 - If the Offer Type is Kit, continue with [Step 40](#), the Review tab.
 - If the Offer Type is Gift with Purchase, continue with [Step 42](#), the Review tab.
 - If the Offer Type is Buy X Get X, continue with [Step 44](#), the Review tab.
 - If the Offer Type is Buy X Get Y, continue with [Step 46](#), the Review tab.
34. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Transaction Discount** Offer.

Figure 6-25: Review Tab

The screenshot shows the 'Review' tab for a 'Transaction Discount' offer. The interface is divided into several sections:

- Offer Name:** Fall Sale
- Intended Use:** Entitlement
- Transaction Discount:** Indicated by a purple button.
- Settings:**
 - Options:**
 - Include Non-Merchandise Charges: No
 - Allow Items to be used in other Offers: No
 - Include Redlines: No
 - Allow Zero Price: No
 - Comments:** (Empty)
 - Offer Attributes:** (Table with columns: Attribute Name, Attribute Value, Description)
- Qualifying Items:**
 - Threshold Style: Minimum
 - Threshold Type: Quantity
 - Threshold: 1
 - Included:** All Items, That Match AT LEAST ONE Attribute, Season: Summer
 - Excluded:** No Items Excluded
- Award Items:**
 - Award Items:**
 - Priority: 1
 - Maximum Award Amount: -
 - Offer Count Limit: -
 - Discount Type: Percent Off
 - Discount Value: 10
 - Maximum Quantity: -
 - Award Value Distribution: Prorate award value across qualifying items
 - Included:** All Items, That Match AT LEAST ONE Attribute

Navigation buttons at the bottom: Previous, Next, Cancel, OK.

Figure 6-39: Review Tab – Transaction Discount

35. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

36. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Line Item Discount** Offer.

Review

Offer Name: Summer Intended Use: Any

Settings

Options

Include Non-Merchandise Charges	No
Allow Items to be used in other Offers	No
Include Redlines	No
Allow Zero Price	No

Comments

Qualifying Items

Threshold Style	Minimum	Subtotal Minimum	-
Threshold Type	Quantity	Subtotal Maximum	-
Threshold	1		

Included

All Items

Excluded

No Items Excluded

Award Items

Award Items

Priority	1
Maximum Award Amount	-
Offer Count Limit	0
Discount Type	Percent Off
Discount Value	2
Maximum Quantity	-
Award Value Distribution	Issue award to each qualifying item

Included

All Items

Excluded

Previous Next Cancel OK

Figure 6-40: Review Tab – Line Item Discount

37. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

38. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Fixed Quantity/Price** Offer.

Review

Offer Name: Summer Intended Use: Any

Settings

Options

Include Non-Merchandise Charges	No
Allow Items to be used in other Offers	No
Include Redlines	No
Allow Zero Price	No

Comments

Qualifying Items

Threshold Style	Exact	Subtotal Minimum	-
Threshold Type	Quantity	Subtotal Maximum	-
Threshold	1		

Included

All Items

Excluded

No Items Excluded

Award Items

Award Items

Priority	1
Maximum Award Amount	-
Offer Count Limit	0
Discount Type	Override Price
Discount Value	25
Maximum Quantity	-
Award Value Distribution	Issue award to each qualifying item

Included

All Items

Excluded

Previous Next Cancel OK

Figure 6-41: Review Tab – Fixed Quantity/Price

39. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

40. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Kit** Offer.

The screenshot shows the 'Review' tab for a 'Kit' offer. The top bar is blue with the title 'Review'. Below it, the offer details are: Offer Name 'Summer', Intended Use 'Any', and a 'Kit' icon. The main area is divided into three panels: Settings, Qualifying Items, and Award Items.

Settings Panel: Contains an 'Options' section with four checkboxes, all set to 'No': 'Include Non-Merchandise Charges', 'Allow Items to be used in other Offers', 'Include Redlines', and 'Allow Zero Price'. There is also a 'Comments' section with a green plus icon.

Qualifying Items Panel: Titled 'Qualifying Items', it shows 'Set 1' with a threshold of 1. It lists 'Threshold Style' as 'Minimum', 'Threshold Type' as 'Quantity', and 'Subtotal Minimum' and 'Subtotal Maximum' as '-'. Under 'Included', it says 'All Items'. Under 'Excluded', it says 'No Items Excluded'.

Award Items Panel: Titled 'Award Items', it shows 'Set 1' with a priority of 1. It lists 'Maximum Award Amount' as '-', 'Offer Count Limit' as 1, 'Discount Type' as 'Percent Off', 'Discount Value' as 5, and 'Maximum Quantity' as '-'. The 'Award Value Distribution' is set to 'Issue award to each qualifying item'. Under 'Included', it says 'All Items'.

At the bottom right, there are buttons: 'Previous', 'Next', 'Cancel', and 'OK'.

Figure 6-42: Review Tab - Kit

41. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

42. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Gift with Purchase** Offer.

The screenshot shows the 'Review' tab for a 'Gift with Purchase' offer. The top bar is blue with the title 'Review'. Below it, the offer details are: Offer Name 'Summer', Intended Use 'Any', and a 'Gift with Purchase' icon. The main area is divided into three panels: Settings, Qualifying Items, and Award Items.

Settings Panel: Contains an 'Options' section with four checkboxes, all set to 'No': 'Include Non-Merchandise Charges', 'Allow Items to be used in other Offers', 'Include Redlines', and 'Allow Zero Price'. There is also a 'Comments' section with a green plus icon.

Qualifying Items Panel: Titled 'Qualifying Items', it shows 'Set 1' with a threshold of 1. It lists 'Threshold Style' as 'Minimum', 'Threshold Type' as 'Quantity', and 'Subtotal Minimum' and 'Subtotal Maximum' as '-'. Under 'Included', it says 'All Items'. Under 'Excluded', it says 'No Items Excluded'.

Award Items Panel: Titled 'Award Items', it shows 'Set 1' with a priority of 1. It lists 'Maximum Award Amount' as '-', 'Offer Count Limit' as 1, 'Discount Type' as 'Percent Off', 'Discount Value' as 10, and 'Maximum Quantity' as '-'. The 'Award Value Distribution' is set to 'Issue award to each qualifying item'. Under 'Included', it lists 'Items: Boys Argyle Sweater (ID 210009985)'.

At the bottom right, there are buttons: 'Previous', 'Next', 'Cancel', and 'OK'.

Figure 6-43: Review Tab – Gift with Purchase

43. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

44. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Buy X Get X** Offer.

Review

Offer Name: Summer Intended Use: Any Buy X Get X

Settings

Options

- Include Non-Merchandise Charges: No
- Allow Items to be used in other Offers: No
- Include Redlines: No
- Allow Zero Price: No

Comments

Qualifying Items

Threshold Style: Minimum Subtotal Minimum: -

Threshold Type: Quantity Subtotal Maximum: -

Threshold: 1

Included

All Items

Excluded

No Items Excluded

Award Items

Award Items

- Priority: 1
- Maximum Award Amount: -
- Offer Count Limit: 2
- Award Quantity: 1
- Discount Type: Percent Off
- Discount Value: 25
- Maximum Quantity: -
- Award Value Distribution: Issue award to each qualifying item

Included

All Items

Previous Next Cancel **OK**

Figure 6-44: Review Tab – Buy X Get X

45. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

46. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Buy X Get Y** Offer.

Review

Offer Name: Summer Intended Use: Any Buy X Get Y

Settings

Options

- Include Non-Merchandise Charges: No
- Allow Items to be used in other Offers: No
- Include Redlines: No
- Allow Zero Price: No

Comments

Qualifying Items

Set 1

Threshold Style: Minimum Subtotal Minimum: -

Threshold Type: Quantity Subtotal Maximum: -

Threshold: 1

Included

All Items

Excluded

No Items Excluded

Award Items

Award Items

- Priority: 1
- Maximum Award Amount: -
- Offer Count Limit: 1
- Award Quantity: 1
- Discount Type: Percent Off
- Discount Value: 20
- Maximum Quantity: -
- Award Value Distribution: Issue award to each qualifying item

Included

All Items

Previous Next Cancel **OK**

Figure 6-45: Review Tab – Buy X Get Y

47. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

48. The **Review** tab displays key elements in the Offer Setup. Review the following for the **Tiered Discount** Offer.

Figure 6-46: Review Tab – Tiered Discount

49. Click **OK** to create the offer, or click **Cancel** to close without saving.

Note: Before you save the offer, you can use the tab links along with **Previous** and **Next** to go back to any point in the create Offer process and make changes.

Editing Offers

You can access an offer for editing using the following methods to display the Edit option:

- Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer on **Offer Advanced Search** screen (**Offer Record Result Section**).

Figure 6-26: Overflow Menu Options (Offers Advanced Search)

- Click the **Overflow Menu** icon on the far right in the data display section for each individual Offer on **Offer Quick Search** screen.

▪ Click **Edit**.

Promotion Home ✕

Promotion Home

Active Promotions
77
\$91,738,991.79
Revenue LTD

Active Offers
56
\$91,753,817.69
Revenue LTD

Offers

Match Type ☒ Partial ☐ Exact Create Offer

Search for an Offer by Hierarchy value, Offer ID, name, type, or intended use

Offer Advanced Search

Name and Status	Offer Type	Intended Use	Revenue LTD	
Transaction Deal Testing 1 (ID 6842) 2 Active Promotions	Transaction Discount	Any	\$0.00	⋮
Cyber Monday Deal (ID 7336) 0 Active Promotions	Transaction Discount	Any	\$0.00	⋮
Winter Shoes Clearance (ID 7335) 5 Active Promotions	Transaction Discount	Product	\$0.00	⋮
Offer !!!!! Offer !!!! Offer!!!!!!!!!!!! (ID 7334) 1 Active Promotions	Transaction Discount	Coupon	\$0.00	⋮
Franchisee Deal - 2 (ID 7333) 4 Active Promotions	Line Item Discount	Any	\$0.00	⋮
Franchisee Deal - 3 (ID 7332) 3 Active Promotions	Transaction Discount	Any	\$0.00	⋮
Franchisee Deal - 1 (ID 7331) 2 Active Promotions	Transaction Discount	Any	\$0.00	⋮

Show More... 1-25 of 252 items

Figure 6-27: Overflow Menu Options (Quick Search)

For detailed information on each section while editing an offer see [Creating Offers](#).

Duplicating Offers

You can duplicate an offer using the following methods to display the Duplicate option:

- Offer Advanced Quick Search
 - Click the **Overflow Menu** icon on the far right in the data display section for each individual **Offer** on **Offer Advanced Search** screen.
 - Click **Duplicate**.

Offers Search

Search

Offer ID

Hierarchy Level

All

Hierarchy Value

All

Promotions

All

Offer Type

All

Intended Use *

☒ Any

☒ Coupon

☒ Product

☒ Entitlement

Attribute Type

All

Attribute Value

Created By

Reset Search

358 Offers Found Sort By Last Update Date

Create Offer

Name and Status	Type	Intended Use	Revenue LTD	
Transaction Deal Testing 1 (ID 6842) 1 Active Promotions	Transaction Discount	Product	\$0.00	⋮
Trans ShipAny 2020 (ID 11900) 1 Active Promotions	Transaction Discount	Any	\$0.00	⋮
All Promotion Types (ID 10897) 0 Active Promotions	Tiered Discount	Any	\$0.00	⋮
BuyXGetX ShipProduct 2020 (ID 11912) 0 Active Promotions	Buy X Get X	Product	\$0.00	⋮
Kit ShipProduct 2020 (ID 11910) 0 Active Promotions	Kit	Product	\$0.00	⋮
Trans ShipProduct 2020 (ID 11907) 0 Active Promotions	Transaction Discount	Product	\$0.00	⋮
Gift ShipProduct 2020 (ID 11911) 0 Active Promotions	Gift with Purchase	Product	\$0.00	⋮
Line ShipProduct 2020 (ID 11908) 0 Active Promotions	Line Item Discount	Product	\$0.00	⋮
Fixed ShipProduct 2020 (ID 11909) 0 Active Promotions	Fixed Quantity/Price	Product	\$0.00	⋮
BuyXgetx (ID 8902) 1 Active Promotions	Buy X Get X	Any	\$0.00	⋮
BuyXGetY ShipAny 2020 (ID 11906) 0 Active Promotions	Buy X Get Y	Any	\$0.00	⋮

Show More... 1-25 of 358 items

Figure 6-28: Overflow Menu Options (Offer Advanced Search)

- Offers Quick Search
 - Click the **Overflow Menu icon** on the far right in the data display section for each individual Offer while [Viewing Offers](#).
 - Click **Duplicate**.

Promotion Home

Active Promotions
122
\$3,564,341.42
Revenue LTD

Active Offers
94
\$95,307,410.45
Revenue LTD

Offers

Match Type ☒ Partial ☐ Exact Create Offer

Search for an Offer by Hierarchy value, Offer ID, name, type, or intended use

Offer Advanced Search

Name and Status	Offer Type	Intended Use	Revenue LTD
Franchisee Offer (ID 14465) 0 Active Promotions	Transaction Discount	Any	\$0.00
ETL after Promote disabled (ID 14464) 0 Active Promotions	Transaction Discount	Entitlement	\$0.00
Discount - Ship Dept 925 for RCRMCS-8646 (ID 14463) 1 Active Promotions	Transaction Discount	Product	\$0.00
Transaction Discount (ID 13966) 2 Active Promotions	Transaction Discount	Coupon	\$0.00
Tiered Discount testing (ID 13964) 0 Active Promotions	Tiered Discount	Product	\$0.00
Tiered Discount testing (ID 13962)	Tiered Discount	Product	\$0.00

Show More... 1-25 of 411 items

Figure 6-29: Quick Offers Search Overflow Menu icon Options

- View Offer View
 - Click the **Overflow Menu icon** on the far right in the data display section for each individual Offer while [Viewing Offers](#).
 - Click **Duplicate**.

View Offer (ID 12936)

Offer Name
Discount - Ship Dept 925

POS Name
Discount - Ship Dept 925

Intended Use
Product

Transaction Discount

Settings

Options

Include Non-Merchandise Charges No

Allow Items to be used in other Offers No

Include Redlines No

Allow Zero Price No

Comments

Qualifying Items

Threshold Style Minimum Subtotal Minimum -

Threshold Type Quantity Subtotal Maximum -

Threshold 1

Included

All Items in:

Department: Accessory Department (ID 925)

Excluded

No Items Excluded

Award Items

Award Items

Priority 1

Maximum Award Amount -

Offer Count Limit -

Discount Type Percent Off

Discount Value 20

Maximum Quantity -

Award Value Distribution Prorate award value across qualifying items

Included

All Items in:

Department: Accessory Department (ID 925)

Excluded

No Items Excluded

Duplicate

Edit

Done

Figure 6-30: View Offer (Duplicate)

For detailed information on each section after duplicating an offer see [Creating Offers](#).

Viewing Offers

You can access an offer for viewing using the following methods to display the View option:

- Offers Search Results
 - Click the **Overflow Menu icon** on the far right in the data display section for each individual Offer on **Offer Advanced Search** screen.
 - Click **View**.

Offers Search

Search

Offer ID

Hierarchy Level

All

Hierarchy Value

All

Promotions

All

Offer Type

All

Intended Use *

☒ Any

☒ Coupon

☒ Product

☒ Entitlement

Attribute Type

All

Attribute Value

Created By

Reset Search

358 Offers Found Sort By Last Update Date

Create Offer

Name and Status	Type	Intended Use	Revenue LTD
Transaction Deal Testing 1 (ID 6842) 1 Active Promotions	Transaction Discount	Product	\$0.00
Trans ShipAny 2020 (ID 11900) 1 Active Promotions	Transaction Discount	Any	\$0.00
All Promotion Types (ID 10897) 0 Active Promotions	Tiered Discount	Any	\$0.00
BuyXGetX ShipProduct 2020 (ID 11912) 0 Active Promotions	Buy X Get X	Product	\$0.00
Kit ShipProduct 2020 (ID 11910) 0 Active Promotions	Kit	Product	\$0.00
Trans ShipProduct 2020 (ID 11907) 0 Active Promotions	Transaction Discount	Product	\$0.00
Gift ShipProduct 2020 (ID 11911) 0 Active Promotions	Gift with Purchase	Product	\$0.00
Line ShipProduct 2020 (ID 11908) 0 Active Promotions	Line Item Discount	Product	\$0.00
Fixed ShipProduct 2020 (ID 11909) 0 Active Promotions	Fixed Quantity/Price	Product	\$0.00
BuyXgetx (ID 8902) 1 Active Promotions	Buy X Get X	Any	\$0.00
BuyXGetY ShipAny 2020 (ID 11906) 0 Active Promotions	Buy X Get Y	Any	\$0.00

Show More... 1-25 of 358 items

Figure 6-31: Overflow Menu Options (Offer Advanced Search)

- Quick Offers Search
 - Click the **Overflow Menu icon** on the far right in the data display section for each individual Offer on **Offer Quick Search** screen.
 - Click **View**.

Promotion Home

Active Promotions 77

\$91,738,991.79 Revenue LTD

Active Offers 56

\$91,753,817.69 Revenue LTD

Offers

Match Type ☒ Partial ☐ Exact

Create Offer

Search for an Offer by Hierarchy value, Offer ID, name, type, or intended use

Offer Advanced Search

Name and Status	Offer Type	Intended Use	Revenue LTD
Transaction Deal Testing 1 (ID 6842) 1 Active Promotions	Transaction Discount	Any	\$0.00
Cyber Monday Deal (ID 7336) 0 Active Promotions	Transaction Discount	Any	\$0.00
Winter Shoes Clearance (ID 7335) 5 Active Promotions	Transaction Discount	Product	\$0.00
Offer !!!! Offer !!!! Offer!!!!!! (ID 7334) 1 Active Promotions	Transaction Discount	Coupon	\$0.00
Franchisee Deal - 2 (ID 7333) 4 Active Promotions	Line Item Discount	Any	\$0.00
Franchisee Deal - 3 (ID 7332) 3 Active Promotions	Transaction Discount	Any	\$0.00
Franchisee Deal - 1 (ID 7331) 2 Active Promotions	Transaction Discount	Any	\$0.00

Show More... 1-25 of 252 items

Figure 6-32: Overflow Menu Options (Offers Quick Search)

For detailed information on each section while editing an offer see [Creating Offers](#).

Offer Scorecard

The Offer Scorecard displays information about the Offer response in a Promotion. You have the ability to periodically review the response data on Offers that are part of promotions.

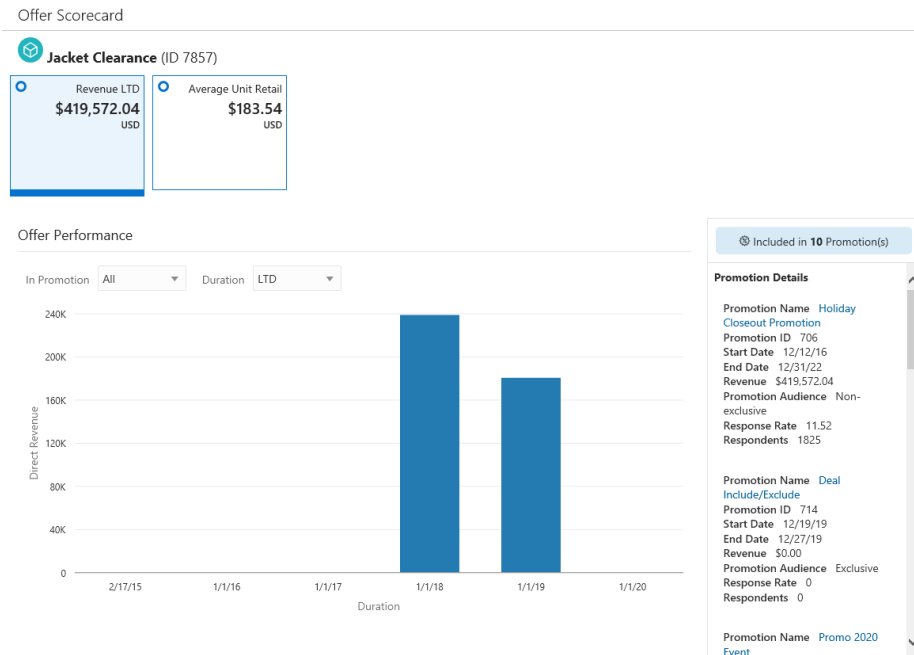


Figure 6-33: Offer Scorecard

The Offer Scorecard contains the following information:

- Offer Scorecard Feature Bar
 - Title of the screen
 - Action Menu with the ability to **View**, **Edit**, or **Duplicate** the Offer.

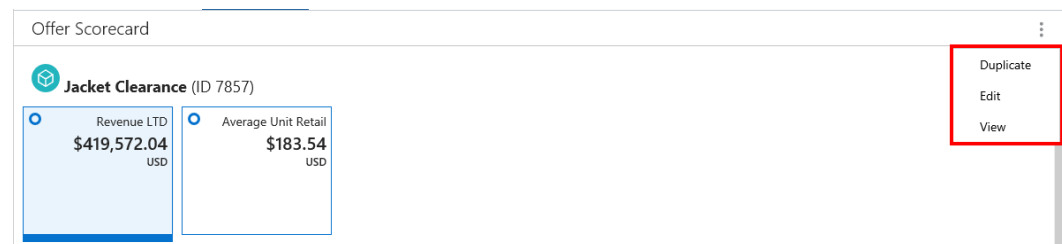


Figure 6-34: Action Menu Options

- Metrics Tiles – There are two tiles, **click** on each one to **see more information**.
 - **Revenue LTD** – Total Direct Revenue generated Lifetime to Date (LTD) from the Offer.
 - * Offer Performance
 - **In Promotion Filter** – List of all the Promotions that the offer is associated with.
 - **Duration**– Durations include:
 - **Last Week** - Offer performance for Last Week (7 days (Current date (-1)) will be displayed.

- **Last Month (Default)** – Offer performance for Last Month (Current date (-1)) will be displayed.
 - **Last 6 Months** – Offer performance for Last 6 Months converted into weeks (Current date (-1)) will be displayed.
 - **Last Year** – Offer performance for Last 12 months (Current date (-1)) will be displayed.
 - **LTD** – Offer performance for the last 5 years (Current date (-1)) will be displayed.
- * Graph
 - The bar graph will **dynamically** update the Offer performance based on the value selected for the **In Promotion** and **Duration**.
 - By default Offer performance graph will be displayed for **All** the Promotions which the Offer is part of for the **Last Month**.
 - The graph will represent a plot between the **Direct Revenue** on Y-axis and **Duration** on X-axis for each individual Promotion.
- * Promotion Details Side Panel
 - **Promotion Name** – Name of the Promotion.
 - Click the **Promotion Name** link from the Promotion Details panel on the Offer Scorecard screen to display the **View Promotion** screen for the selected promotion on the **same tab**. Click **Done** to return to the Offer Scorecard. See [Viewing a Promotion](#) to learn more about the information on that screen.
 - **Promotion ID** – ID of the Promotion.
 - **Start Date** – The date the Promotion begins.
 - **End Date** – The date the Promotion ends.
 - **Revenue** – Offer's Revenue will be displayed depending on the value selected in the duration.
 - **Promotion Target** – Indicates the type of targeting used by the Promotion (Nonexclusive or Exclusive).
 - **Response Rate** – Calculated by dividing the total number of Respondents by the Total number targeted. Set to 100.00 for Non-Targeted customers.
 - **Respondents** – Number of Customers in the Target who have responded to the Offer in the Promotion. This is the same as the Total for Non-Targeted customers.
- Average Unit Retail Tile - The Average Unit Retail calculated for a given item over a select period of time. To calculate AUR, you simply take the total revenue (or net sales) divided by the number of units sold.
- * Financial Summary
 - Direct Revenue – Sum Total of the Revenue generated using the offer.
 - Total Cost of Goods Sold – The sum total of the cost of all the items sold on which the offer was applied.
 - Total Discounts – Sum Total of the Discounts.
 - Average Units Sold – Total Number of Items Sold / Total Number of unique Transactions.
 - Margin % – Net Profit / Direct Revenue
 - Net Profit – Direct Revenue minus Total Cost Of Goods Sold

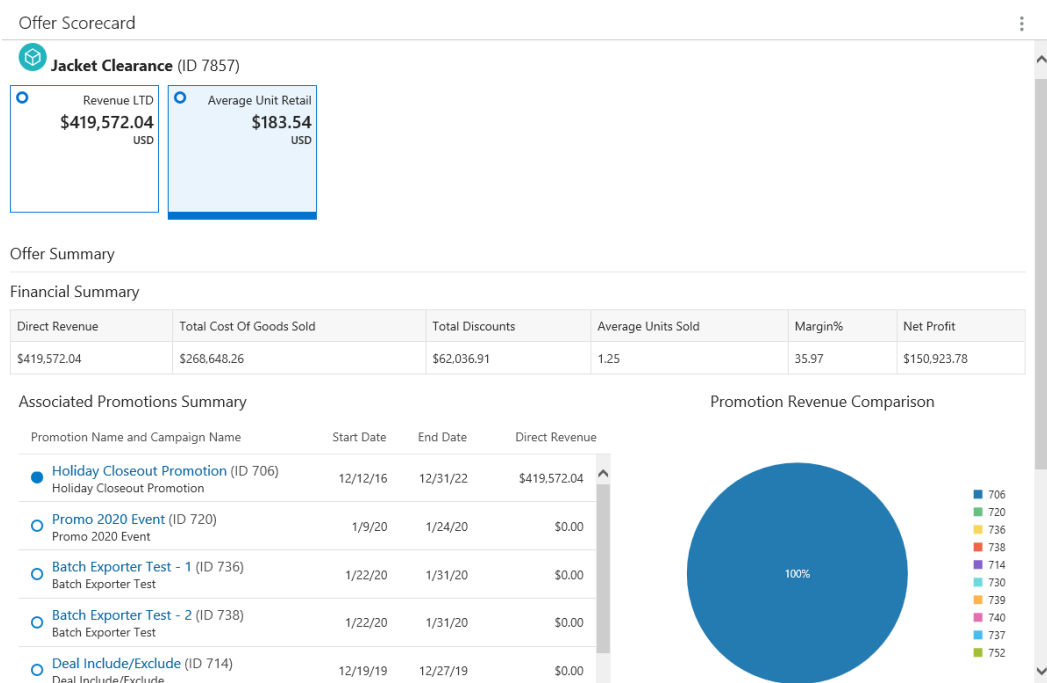


Figure 6-35: Average Unit Retail Tile

- * Associated Promotions Summary
 - Data Section
 - A Blue Dot represents an **Active Promotion** or an **Empty Dot** represents an **Inactive Promotion**.
 - **Promotion Name and Campaign Name** – Name of the Promotion and Campaign.
 - When a user selects the promotion name from the list of promotions on the Offer Scorecard screen, the system displays the View Promotion screen for the selected promotion on the same tab. See [Viewing a Promotion](#) for more information.
 - **Promotion ID** – Contains the **Title ID** and the **Promotion ID** in parenthesis.
 - **Start Date** – The date the promotion **begins**.
 - **End Date** – The date the promotion **ends**.
 - **Direct Revenue** - Total extended price of **all** line items associated with the Promotion's Offers.
- * Promotion Revenue Comparison
 - Pie Chart
 - The Pie chart shows the pictorial representation of the **direct revenue** generated from the respective **promotions**.
 - The title of the Pie chart is **Promotion Revenue Comparison**.
 - The **maximum** of top ten promotions by **direct revenue** will be displayed.
 - Each sector of the pie chart represents the **direct revenue earned** by an **individual** promotion with a different color.

- A legend will be displayed to the **right** of the Pie chart and is **linked** with the information displayed in the Pie chart.

Note: To close the Offer Scorecard click the X icon associated with the Offer Number in the Open Tasks area at the top of the screen.

Registries

Overview

The Customer Item Registry allows you to set up two different types of registries:

- Gift Registry: Select the items that the recipient would like to receive – usually for a 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

About This Chapter

This chapter contains the following information:

- **Looking Up an Item Registry** – Describes how to navigate to the Registries page and look up registries.
- **Creating a Registry** – Explains each of the five steps for creating a registry in the Registry Wizard:
 - **Step 1: Information** – Add the basic registry details, such as owner and type.
 - **Step 2: Items** – Add the items to the list for the Gift Registry or Wish List.
 - **Step 3: Attributes** – Add the registry attributes, if any.
 - **Step 4: Addresses** – Add event addresses. This only applies to Gift Registries.
 - **Step 5: Review** – Review the information that has been entered, make revisions if necessary, and save the registry.
- **Viewing a Registry** – Explains how to view a registry in read-only mode
- **Downloading a Registry Report** – Explains how you can download a report containing a registry's information in PDF format
- **Editing a Registry** – Explain the different ways to navigate to the Edit Registry page and how to edit the registry.
- **Deleting a Registry** – Explains how to delete a registry

Looking Up an Item Registry

There are two ways to look up an item registry. You can search all registries using the Registries  icon on the main toolbar, or you can look up just the registries for a specific customer using Registries option on the Actions menu in the Customer Dashboard.

To look up a registry from the Customer Dashboard:

1. From the Actions  menu in the Customer Dashboard, choose the **Registries** option. This displays the list of Registries Found for the customer. See [figure 7-1](#).

To look up a registry from the main toolbar:

1. Click the Registries  icon. This displays the Registries page.

The screenshot shows a web interface titled "Registries". On the left is a "Search" sidebar with a "Registry Owner" section containing five input fields: "Last Name", "First Name", "Email Address", "Phone Number", and "Customer ID". On the right is a "Registry Search" section with the text "Enter search parameters in the sidebar to search for".

Figure 7-1: Registries Page

2. Enter search criteria in one or more of the following fields in the Search panel:

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 **Reset**.

- **Registry Owner**
 - Last Name - Last name of the registry owner.
 - First Name - First name of the registry owner.
 - Email Address - Registry owner's email address.
 - Phone Number - Registry owner's phone number.
 - Customer ID - ID of the customer who owns the registry.
 - Card Number - Number for a Card associated with the customer.
 - **Registry**
 - Registry Type - Select All, Gift Registry, or Wish List from the list.
 - Registry Name - Name of the registry.
 - Event Type - Type of event for which the registry was created (wedding shower, for example) **Note:** You should not select an Event Type when searching for a Wish List, because a Wish List is not associated with an event.
 - Event Date - Use the calendar to select the date on which the event occurs.
 - Registry ID - The ID of the registry.
3. Click **Search**. This displays a list of registries that match the entered criteria. If you searched for the registries for one specific customer for example, by entering a complete Customer ID, you will see just that customer's registries. If you chose **Registries** from the Actions menu in the Customer's Dashboard, the registries for just that customer are displayed, as in the example following:



Registry Information	Date	Registry Owners
 wedding wishlist Wish List	4/18/19 Created	 
 Wedding Wedding Shower	4/16/20 at 3:00 PM	 

Figure 7-2: Registries Found List

- The number of registries that match the search criteria is shown to the left of the Sort By field.
- You can sort the registries displayed in the grid by the following options on the list:
 - Registry Name – Ascending order
 - Date Created- Descending order. This field sorts only for Wish Lists.
 - Registry Owner – Ascending order, by Last Name
 - Number of Items – Highest to lowest
- Create Registry – Displays a Create Registry screen See: [Creating a Registry](#) for more information.
- The registry grid displays the following information for each registry:
 - Blue dot  at the left of the Wish List or Registry Name. If filled, indicates that the wish list or registry is active. If unfilled, it is inactive. Values are
 - * Active – displays from the time the registry is activated to the date and time of the event.
 - * Past – displays any time after the date and time of the event.
 - Registry Information – Shows the Registry Name and Registry Type
 - Date – The Event Date for a Registry or the Create Date for a Wish List
 - Registry Owners - The name of the Primary customer who owns the registry first, with any other owners subsequently.
- An action menu icon  is displayed at the end of each row. It has these options:
 - Delete – Select to delete the registry. See [Deleting a Registry](#)
 - Download Report – Select to download a report with information about the registry. See [Downloading a Registry Report](#).
 - Edit – Select to edit the registry. See [Editing a Registry](#)
- You can view registry details by clicking the name of the registry in the grid.

Creating a Registry

Step 1: Information

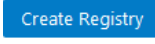
1. From the Actions menu on a Customer's Dashboard, choose **Registries**, or click the **Registries**  icon to display the Registries screen, and click **Create Registry** . Either action displays the Create Registry Wizard.

Figure 7-3: Create Registry Wizard

The progress bar at the top indicates that you are located at step 1, Information. As you progress, the Create Registry Wizard moves you through each of the five steps.

2. Under Registry Details, Select the Registry Type. A **Gift Registry** is tied to an event, while a **Wish List** is open-ended. This is mandatory.
3. Enter a name for the registry in the **Registry Name** field. This is mandatory.
4. If the **Ready to Publish** check box is selected, it indicates that the registry will be available for export to a third party when the registry is saved
5. If the Registry Type is Wish List, there are no other mandatory fields under Registry Details. If the Registry Type is Gift Registry, also make selections for these mandatory fields:
 - Event Type – Select an Event Type from the list.
 - Event Date – Select the date and time of the event from the calendar.
 - Expiration Date – Select the date that the registry expires, from the calendar.
6. Optionally, you can enter comments about the registry in the **Comments** field.
7. Optionally, you can add an image that represents the Gift Registry. Click **Edit** next to the logo in the **Image** field to display an Edit Registry Image prompt that lets you drop or upload a new image. This is only available for Gift Registries.
8. Under Registry Owners, choose **Add** from the Actions menu, or click the **Add** **+** icon. Either action displays the Add Registry Owner screen:

Figure 7-4: Add Registry Owner

9. In the search field at the top of the screen, enter search criteria such as customer name or ID. A list of customers matching the search criteria is displayed. Select the customer for whom you are creating the registry. This displays the Name, ID, Alternate Key, and primary contact information of the selected customer under the search field. When you select a customer, the screen is populated with available information about the customer.
10. Add any details that are missing. The following information can be entered, with mandatory fields marked by asterisks (*):
 - **Primary** – Indicates whether this customer is the primary owner of the registry.
 - **Nickname** – Enter an optional nickname for the registry owner.
 - **Phone** – Information about the registry owner’s phone number:
 - The Phone switch defaults to On . If this switch is set to Off , the following fields are not displayed.
 - Registry Phone – Select the type of phone number being used for the registry from the list, or select Create New to enter a new phone number.
 - Phone Number – The registry phone number. This field is mandatory.
 - Extension – the extension of the registry phone number, if applicable.
 - User Label – Enter an optional user label for the registry phone number.
 - **Email** – Information about the registry owner’s email address:
 - The Email switch defaults to On . If this switch is set to Off , the following fields are not displayed.
 - Registry Email – Select the type of email address being used for the registry from the list, or select Create New to enter a new email address.
 - Email – The registry email address. This field is mandatory.
 - User Label – Enter an optional user label for the registry email address
 - **Address** – Information about the registry owner’s address:
 - The Address switch defaults to On . If this switch is set to Off , the following fields are not displayed.
 - Registry Address – Select the type of address being used for the registry from the list, or select Create New to enter a new address.

- Country – Select the country of the registry from the list.
 - Address 1-4 –The street address of the registry. Address 1 is mandatory.
 - Apartment – The apartment number of the registry, if applicable.
 - City – The city of the registry. This field is mandatory.
 - State – The state or province of the registry. This field is mandatory.
 - Postal Code – The postal code of the registry. This field is mandatory.
 - County – The County of the registry.
 - User Label – Enter an optional user label for the registry address.
11. Click **OK** when you are finished entering the customer details. This returns you to the Create Registry screen. The customer information is displayed in the Registry Owners list. If you are done entering registry information, click **Next** to go to Step 2, Items.

Step 2: Items

The screenshot shows the 'Create Registry' window with the 'Items' step selected. The 'Items in Registry' section is empty, showing 'No Items to display'. The 'Registry Information' sidebar on the right provides details about the registry being created, including its name, creation date, and owner. The bottom of the window features navigation buttons: 'Previous', 'Next', 'Cancel', and 'OK'.

Figure 7-5: Create Registry Items

To add items to a registry:

1. There are two methods for adding items to a registry, using the Add command to display the Add Items to Registry dialog, where you can search for items, or by entering the exact item ID in the Quick Add field:
 - Under Items in Registry, choose **Add** from the Actions menu, or click the **Add** ⁺ icon. Either action displays the Add Items to Registry dialog:

Figure 7-6: Add Items to Registry

- In the Search panel, enter an Item ID, Description, or both in the provided fields and click **Search**. This displays a list of items matching the search criteria in the Results panel. If you want to clear a search, click **Reset**. Use the Search panel to add more items.
- The Results panel displays the Image, Item ID and Description of the items in the search results:

Results

Actions ▾ + 🗑

Image	Item ID	Description	Desired Quantity
	111100041	Mens Argyle Sweater Fendi - Almond	1 ▾ ▴
	111100042	Mens Argyle Sweater Gucci - Almond	1 ▾ ▴
	111100067	Mens Cashmere Sweater - CLEARANCE	1 ▾ ▴
	111100033	Mens Cashmere Sweater Fendi - Almond	1 ▾ ▴

Figure 7-7: Search Results

If you want to specify the desired quantity of this item, use the Increment and Decrement ▾ ▴ arrows to increase or decrease the quantity. The Desired Quantity value defaults to 1

- If you want to add an item from the Results panel to the Registry, select the item and choose **Add** from the Actions menu, or click the **Add** + icon. Items that you add are displayed in an Add Items to Registry panel on the right side of the page. To remove all items from the list, choose **Remove All** from the Actions menu or click the

Remove All 🗑 icon.

- Click **OK** to add items. The selected items are added to the Items in Registry list on the Items tab.

Or:

- In the Quick Add field (see [figure 7-5](#)), enter the exact item ID and click **Add**. If the exact match is found, the item is added to the Items in Registry table. If the item is not found, the message *Invalid item* displays.

- If the item is found, the Image, Item ID and Description of the item and a Desired Quantity field are displayed. The default quantity is 1. You can change the quantity using the Increment and Decrement  arrows to increase or decrease the quantity.
6. When you are done adding items to the registry, click **Next** to go to **Step 3**, Attributes.

Step 3: Attributes

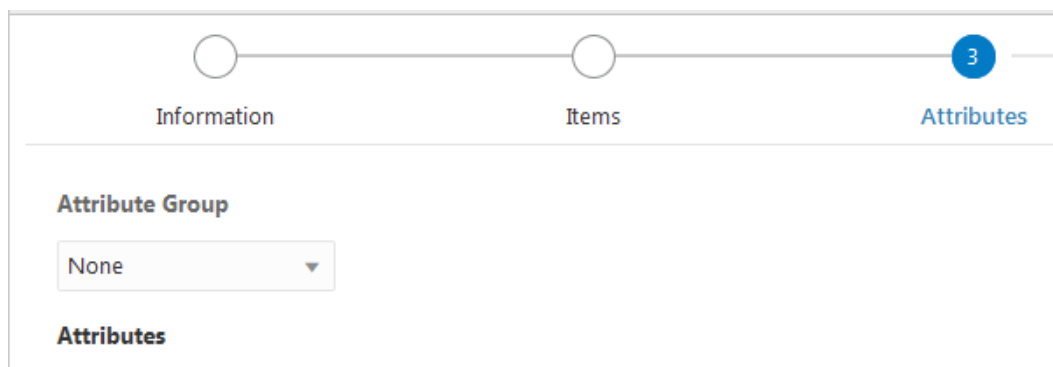


Figure 7-8: Registry Attributes

To add attributes to a registry:

1. Select a group from the Attribute Group list. A list of attributes specific to the selected Attribute Group is displayed.

Note: This step is optional unless specific attributes are included in a group and you want to select any of them.

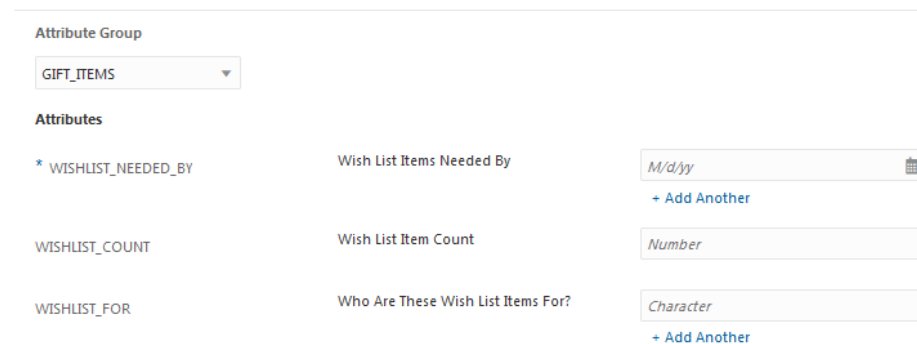


Figure 7-9 Attributes List

2. If you selected an Attribute Group, the attributes belonging to that group are listed in the Attributes grid. Enter values for the attributes you want applied to the registry. You must enter a value for each required attribute (indicated by an asterisk*).
 - The grid displays the name, description and value entry field for each attribute.
 - Attributes are displayed by group, with mandatory attributes displayed first.
 - Attribute value entry fields will initially indicate the type of value to enter, for example, (Please select) for a list of items.
 - If there is more than one possible value for the attribute, there is a **+ Add Another** link under the attribute value entry field. Click this link if you have entered a value and need to add another. This displays a duplicate entry field for the attribute.

- A value can only be removed if an **X** appears next to it. The x is only displayed if the value can be removed.
3. If you want to add attributes not assigned to the available Attribute Groups, click the **Manage** button under Additional Attributes.

Note: This is only available for Wish Lists. This displays a Manage Attributes window:

The 'Manage Attributes' window contains a section titled 'Include Attributes' with a table. The first row is a header with a checkbox, 'Name', and 'Description'. Below it are three rows of attributes, each with a checkbox, a name, and a description. At the bottom right are 'Cancel' and 'OK' buttons.

☐	Name	Description
☐	Summer Clearance	Summer Clearance
☐	Back-to-School	Back-to-School
☐	WISHLIST_MAX_VALUE	Wish List Items Under \$

Figure 7-10: Manage Attributes

4. Click the check box next to the Name and Description header row to select all of the attributes, or select the check box next to each attribute that you want to include, and click **OK**. The selected attributes are display beneath **Manage**.
5. If you have added attributes using the Manage Attribute window, specify values for those attributes.
6. When you are done selecting attributes and entering values, click **OK**.
7. Click **Next** to go to [Step 4, Addresses](#).

Step 4: Addresses

The 'Create Registry' form shows a progress bar with four steps: Information, Items, Attributes, and Addresses. The 'Addresses' step is currently active, indicated by a blue circle with the number 4. Below the progress bar are three toggle switches labeled 'Event Venue', 'Before Event', and 'After Event', all of which are currently turned off.

Figure 7-11: Addresses

Note: This section only applies to Gift Registries

To add addresses:

1. Click the switch next an address type to On  to display a list of fields associated with that address. To hide the fields, set the switch to Off . The following example shows the fields associated with the Event Venue address. Fields marked with an asterisk (*) are mandatory:

Event Venue 

* Name	* City
* Address 1	* State
Address 2	* Postal Code
Address 3	County
Address 4	Country (Please select)
Apartment	

Figure 7-12: Event Venue

2. Enter information in the fields.
 - Name – The name of the event venue. This field is mandatory.
 - Address 1-4 – The street address of the venue. Address 1 is mandatory.
 - Apartment – The apartment number, if applicable.
 - City – The city of the venue. This field is mandatory.
 - State – The state or province of the venue. This field is mandatory.
 - Postal Code – The postal code of the venue. This field is mandatory.
 - County – the County of the venue.
 - Country – The country of the venue. Choose a country from the list

If there is a Use Address field for the event, as in the following example, select a name from the list. This will populate the remaining fields:

Before Event 

Use Address

* Name

Figure 7-13: Address Fields

3. When you are done entering addresses, click **OK**.
4. Click **Next** to go to Step 5, Review. This displays a page where you can review all the information you have entered for the registry.

Step 5: Review

barbara's test

Registry Information

Fields	Value
Registry Type	Gift Registry
Publish Registry	No
Event Type	BABY_SHOWER
Event Date	7/27/19 12:00 PM
Expiration Date	7/27/19

Registry Comments

Registry Owners

Primary	Name	Nickname	Registry Phone	Registry Email	Registry Address
☒	Barbara's test			barbaratest@reg.com	123456 789012

Figure 7-14: Review

To review the registry:

1. Look over the information in the review page. If there is anything you want to change, click the step located in the top bar where the information was first entered. For example, click **Information** to return to the Information screen. Or, you can click **Previous** to navigate to the previous step.
2. Make the changes to the information. For example, if you want to publish the registry, go back to the Information screen and select the Ready to Publish check box. This ensures that the registry is published the next time it is saved.
3. Click **OK** to save your changes in each screen.
4. Click **Review** located in the top bar, and then click **OK** in the Review screen when complete. This saves the registry, and it now appears in the list of registries for the customer.

Viewing a Registry

To view a registry:

1. In the Registries Found list (See [Figure 7-2](#)), click the name of the registry you want to view.
2. This displays the registry details in view-only mode:

View Registry for Jill's Wedding (Customer ID 123456789)

Jill's Wedding

Registry Information

Fields	Value
Registry ID	9740
Registry Type	Gift Registry
Publish Registry	No
Event Type	WEDDING_SHOWER
Event Date	4/16/20 3:00 PM
Expiration Date	4/30/21

Registry Comments

Registry Owners

Primary	Name	Nickname	Registry Phone	Registry Email	Registry Address
☒	Jill's Wedding	Maid of Honour			200 Main Street, Houston, TX 77002

Done

Figure 7-15: View Registry

3. View the items in the registry. You can use the scroll bar to view hidden information.

The following information can be displayed, depending on what has been entered and saved for the registry:

- Customer Bar
 - Title (View Registry for
 - Primary Owner Customer Name
 - Primary Owner Customer ID
- Display Bar
 - The Registry Name
 - Icons for editing the registry and downloading the registry report
- Registry Information – This table contains the following listed Fields and Values, if they have been entered
 - Registry ID
 - Registry Type
 - Publish Registry
 - Event Type – This is displayed for Gift Registries only
 - Event Date – This is displayed for Gift Registries only
 - Expiration Date – This is displayed for Gift Registries only
- Comments – any comments entered about the registry
- Registry Owners
 - Primary – The primary owners are displayed first, with any subsequent owners after.
 - Name
 - Nickname
 - Registry Phone
 - Registry Email
 - Registry Address – AKA Contact Address
- Items in Registry – For each item in the registry, this information is displayed:
 - Image

- Item ID - The item ID has a link, that when clicked, displays a window with detail information.
 - Description
 - Desired Quantity
 - Purchased Quantity
 - Attributes
 - Group
 - Name
 - Description
 - Value
 - Event Venue Address – Displayed for Gift Registries only.
 - Name
 - Address 1-4
 - Apartment
 - City
 - State
 - Postal Code
 - County
 - Country
 - Before Event Address – Displayed for Gift Registries only.
 - Name
 - Address 1-4
 - Apartment
 - City
 - State
 - Postal Code
 - County
 - Country
 - After Event Address – Displayed for Gift Registries only.
 - Name
 - Address 1-4
 - Apartment
 - City
 - State
 - Postal Code
 - County
 - Country
4. Click **Done**. This returns you to the Registries Found list.

Downloading a Registry Report

To download a registry report:

1. In the Registries Found list (see [Figure 7-2](#)), click the actions menu  in the row of the registry for which you want to download a report, and choose the **Download Report** option. Or in the Edit Registry Review or View Registry page, click the Download Report  icon. Either action displays a prompt for saving or running the report.
 - The steps in the prompt can vary based on the browser that is being used.
 - The report is available in PDF format
 - The client must have a PDF viewer to view and print the report.

Registry Report Output

The following example shows the output of a downloaded registry report:

ORACLE®

Registry Detail

Organization: 1234567890

Date Range:

Customer ID: ALL

Registry ID: 9704

Primary Customer ID: 64872

Registry ID - Name	Event Date	Venue Name Venue Address	First Name Last Name	Email Address Phone Number	Address	Item ID - Name	Desired Quantity	Purchased Quantity
9704 - Birthday	N/A	N/A	Tony Harris	tonyharris@harris.com	111100025 - Men's Suit Slacks Armani - Almond	1.00	0.00	
	N/A	N/A	Tony Harris	tonyharris@harris.com	111100049 - Men's Shirt GUCCI - Short Sleeve - Almond	1.00	0.00	
	N/A	N/A	Tony Harris	tonyharris@harris.com	222200002 - Men's Belt - GUCCI	1.00	0.00	
	N/A	N/A	Tony Harris	tonyharris@harris.com	222200025 - Hat Men's - Fendi	1.00	0.00	
Totals for Registry 9704							4.00	0.00
Report Totals							4.00	0.00

Figure 7-16: Registry Report

The Registry Report contains the following information:

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 Customers selected when generating the report. Displays ALL if there was no restriction when running the report.
- Registry ID - The numeric ID for the Registries or Wish Lists selected when generating the report. Displays ALL if there was no restriction when running the report.

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.
- Address - The primary Customer's address, as specified for the Registry or Wish List.
- Item ID - Name - The ID and Name of the Item on the Registry or Wish List.
- Desired Quantity - The desired quantity of the Item.
- Purchased Quantity - The purchased quantity of the Item.
- Totals for Registry:
 - Desired Quantity - The total desired quantity of all Items on the Registry or Wish List that are included on the report.
 - Purchased Quantity - The total purchased quantity of all Items on the Registry or Wish List that are included on the report.
- Report Totals:
 - Desired Quantity - The total desired quantity of all Items included on the report.
 - Purchased Quantity - The total purchased quantity of all Items included on the report.

Editing a Registry

If you need to edit a Registry, click the **Edit**  icon in the View Registry screen (see [Figure 7-13](#)) or, in the Registries Found list, (see [Figure 7-2](#)), or click the Actions menu  in the row of the registry you want to edit, and choose the **Edit** option from the menu. Each action displays the registry in an editable screen:

Figure 7-17: Edit Registry

You can review registry details and edit fields that are editable. Use **Next** to progress



through the Edit Registry screens, or click the **Step** Information located in the top bar. Use **Previous** to return to the previous screen.

The Edit Registry screen displays the same information as that in the Create Registry screen, although not all fields are editable. For more information about entering the fields in a registry, see [Creating a Registry](#).

Information in the Edit Registry screens includes that displayed in the Create Registry screens with these variations:

Information

- Title Bar
 - Title (Edit Registry for)
- Registry Details
 - Registry Type – this is not editable
 - The rest of the fields are editable
- Items
 - The Purchased Quantity for this registry is displayed on the right of the Desired Quantity field. This field is not editable
 - The rest of the fields are editable
- Attributes
 - All fields are editable
- Addresses
 - All fields are editable

Review

- Header Information
 - Displays Edit Registry for Customer name (Customer ID)
 - The Create User ID, Create Date, Update User ID, and Update Date are displayed next to the Registry Name

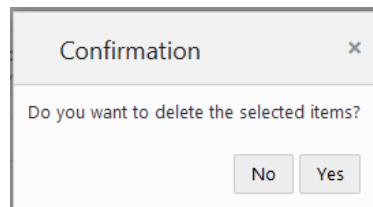
When you are done editing the Registry, click **OK** to save the changes.

For more information about entering the fields in a registry, see [Creating a Registry](#).

Deleting a Registry

To delete a registry:

1. In the Registries Found list (see [Figure 7-2](#)), click the actions menu  in the row of the registry you want to delete.
2. Choose **Delete** from the menu, this displays a Confirmation prompt:



3. Click **Yes** to delete the registry.

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 Cloud Services 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 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 an @ 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.

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.

To access the Reports panel, click the **Reports** icon from the main toolbar.

About this Chapter

This chapter contains the following information:

- [Report Categories and Report Descriptions](#)
- [Displaying Reports](#) - Describes the Reports display page, including:
 - [BI Publisher Toolbar](#)
 - [View Report Options](#)
- [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](#)
 - [Segment Management Reports](#)
 - [Tender Account Management Reports](#)
 - [Registry Management Reports](#)
 - [Task Management Reports](#)

Report Categories

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 in the following sections.

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 Offer, 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 Offer 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.
- Loyalty 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.

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.

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.

Registry Management

- Registry Detail - This report presents detailed information for Gift Registries or Wish Lists. See [Registry Detail 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.

Displaying Reports

To access the Reports panel, click the **Reports** icon from the main toolbar. This displays the Reports panel, which lists all report categories and provides links to report lists and reports:

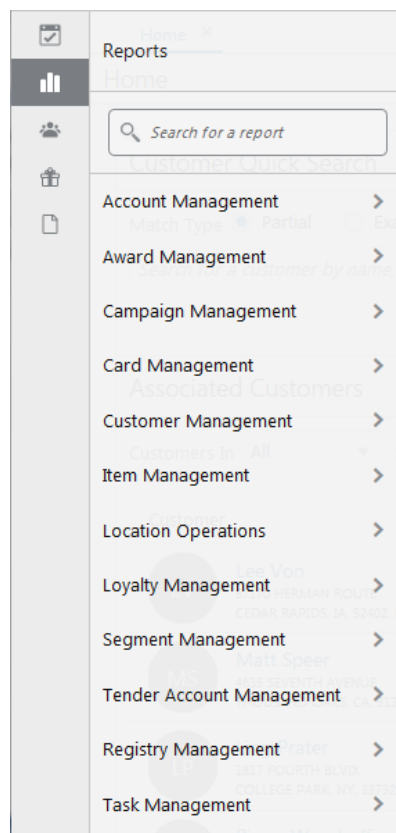


Figure 9-1: Reports

Click the arrow  next to a report category name to expand the report list:

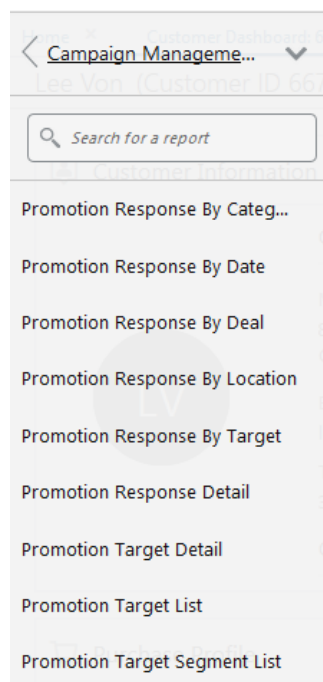


Figure 9-2 Report List

Click the back arrow  to the left to the report category name to return the Reports panel.

To search for a report:

1. Start typing the report name in the **Search for a report** prompt. As you type, a list of reports that match the text is displayed in a list.
2. Select the report that you want from the list.

This displays the Report Criteria screen. See [Running Reports](#) for more information.

Running Reports

To run a report:

1. Click the Reports  icon. This displays the Reports panel.
2. Expand the category of the report you want to run.
3. Select the report that you want to run from the list, or search for the report in the search prompt and select the report from the search list. Either action displays a Report criteria entry screen:

Home × Report - Promotion Response By Date ×

Campaign ID / Name: All

Promotion ID / Name: All

Promotion Time Period: None

Promotion Start Date: 06-23-2019

Promotion End Date: 06-24-2019

Row Limit:

Apply

PromotionResponseByDate...

Figure 9-3 Report Criteria Entry Screen

4. Enter the criteria for the report in the Parameters fields.
5. Click **Apply**. This runs the report. A progress indicator is displayed while the results are retrieved. The report contents are displayed when the query is finished:

Program ID / Name: All

Activity Time Period: Last Month

Activity Start Date: 05-01-2019

Activity End Date: 06-24-2019

Row Limit:

Apply

Account Activity Summary

1 of 33

Automatic Zoom

ORACLE Account Activity Summary

Date Range: Last Month Program ID: ALL

Account Type Code: AWARD

Program ID - Name	Activity Type Code	Create User	Reason Code	Total Trans Count	Total Trans Value
503 - WSDL-AWARD-Housekeeping	Activate Card	N/A	Error_Adjustment	1	0.00
	Issue Coupon	N/A	Error_Adjustment	1	25.00
Totals for Program 503				2	25.00
506 - WSDL-SoapUI-AWARD	Activate Card	N/A	Error_Adjustment	1	0.00
Totals for Program 506				1	0.00
510 - WSDL-TestCase-CardServices	Activate Card	N/A	Error_Adjustment	2	0.00
	Issue Coupon	N/A	Error_Adjustment	1	30.00
Totals for Program 510				3	30.00
1014 - 1715 No Gen	Activate Card	sandra.s	Error_Adjustment	20	0.00
	Activate Card	ham@oracle.com	Error_Adjustment	20	0.00
	Activate Card	N/A	Error_Adjustment	20	0.00
	Activate Card	ORICE-Roles	Error_Adjustment	1	0.00

Run Date: 06/26/2019 05:15 AM Customer Engagement Cloud Services Page 1 of 33

Figure 9-4 Report Content

The Report entry and display screen has these main components:

1. Selection Criteria - The selection criteria for the displayed Report.
2. Report Contents - The contents of the generated Report.
3. 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. Use **Help** to open a Help window. See [BI Publisher Toolbar](#) for more information.

4. 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



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 [View Report Options](#) for more information.



Actions - Select from sending, scheduling, exporting, and job options. See [BI Publisher Actions](#)



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.

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.

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 in the following sections.

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.

Click **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 IDs 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 IDs selected when generating the report, or set to ALL if there was no restriction.
- Serial Number - The Serial Numbers 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 Cloud Services, 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 numbers 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 Cloud Services, 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 Codes selected when generating the report. Set to ALL if there was no restriction.
- Program ID - The ID and Name identifying the Programs 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 9-5 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.

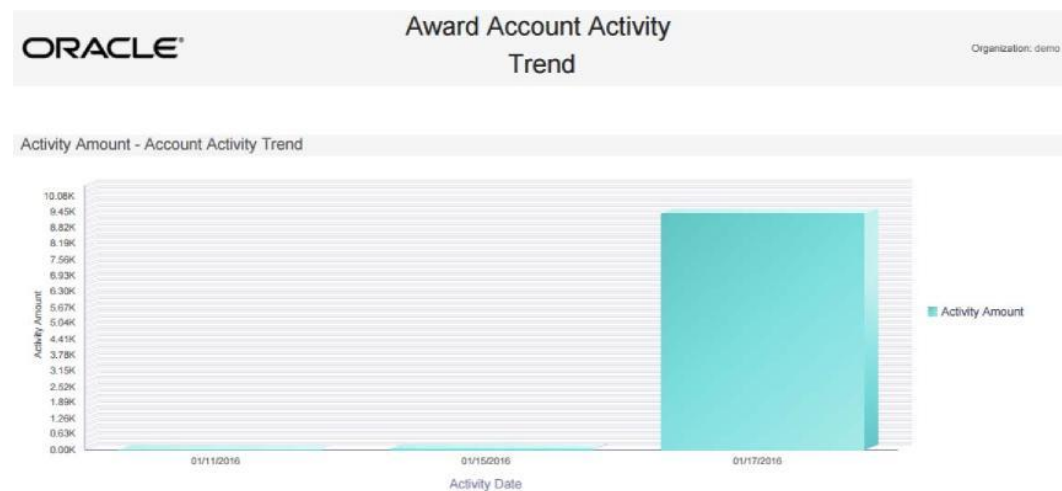


Figure 9-6: Award Account Activity Trend Report - Activity Amount Chart

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 Codes 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.

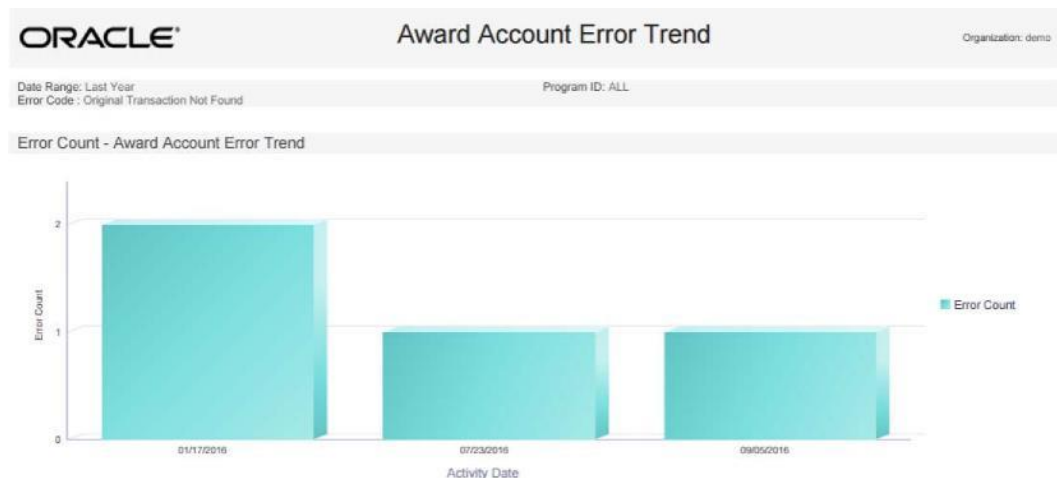


Figure 9-7: Award Error Trend Report - Error Count Chart Report Contents

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
- 21-30 Oracle Retail Customer Engagement Cloud Services User Guide
- 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.
- Analytics/Reports 21-31
- 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 Codes 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:

- Offer ID - The ID identifying a Offer.
- Offer Name - The name of a Offer. For each Offer included on the report:
- Offer Typecode - Describes the type of Offer. 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 Offer expires.
- Coupon Count - The total number of Coupons for the Offer with the same Expiry Date.
- Totals for the Offer ID:
 - Coupon Count - The total number of Coupons for the Offer.
- 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 Offer.

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 Offer, so you can identify the total dates and activities for the Offer. Otherwise, it might be difficult to determine the different totals for the same dates but for different Offers.

Selection Criteria:

- Offer ID / Name - The ID and Name identifying an Offer. All Offers are selected by default. Optionally, select Search to work with the list of eligible Deals, search based on Offer Name, or remove Offers 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 Offer 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 Offers 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.

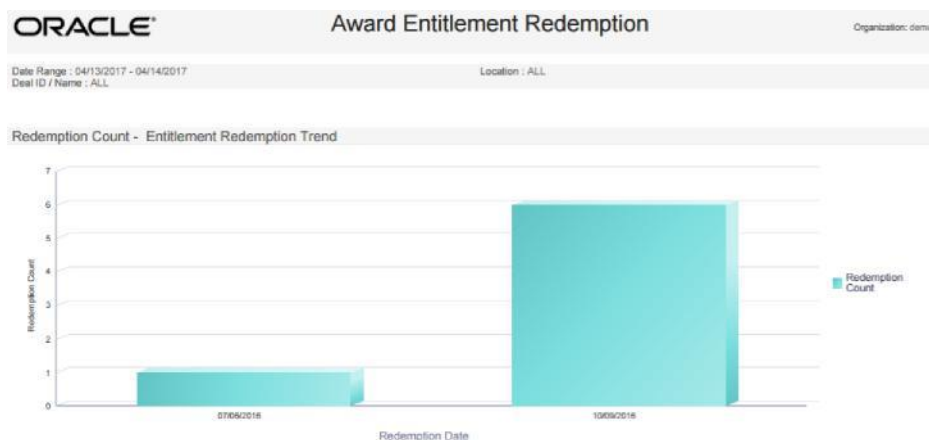


Figure 9-8: Award Entitlement Redemption Report - Entitlement Redemption Count Chart

- Entitlement Redemption Percentage Trend Chart - Displays the percentage of the Offer redeemed for each date.

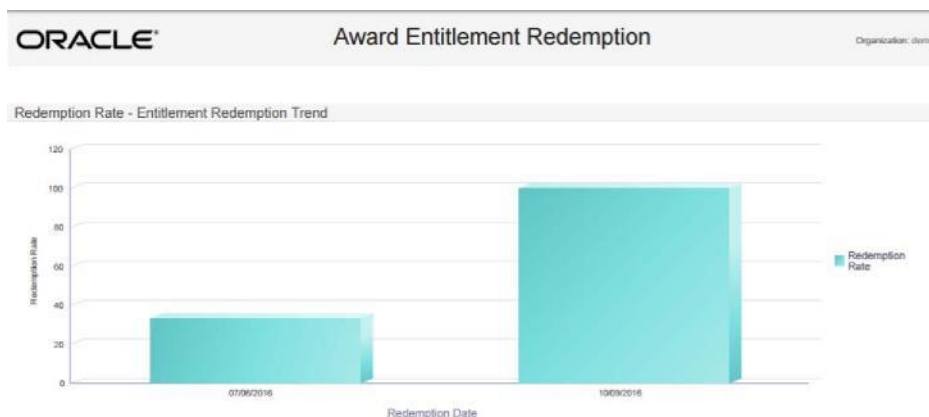


Figure 9-9: Award Entitlement Redemption Report - Entitlement Redemption Percentage Rate Chart

- Entitlement Redemption Redeemed Value Trend Chart - Displays the total redeemed value for the Offer for each date.

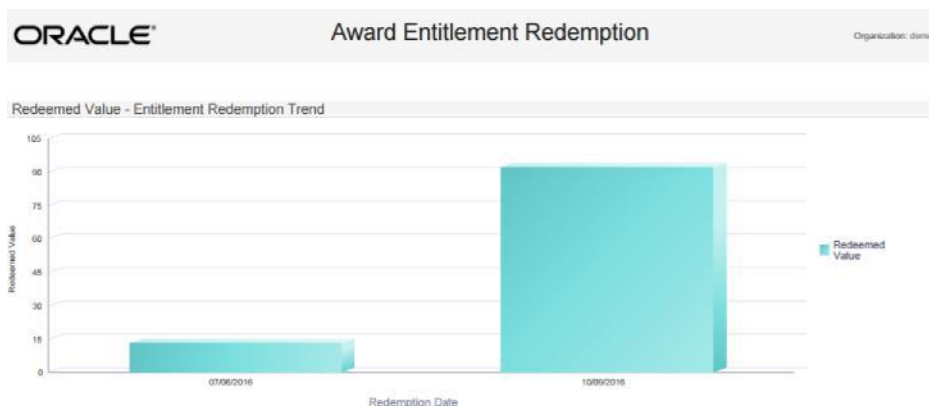


Figure 9-10: Award Entitlement Redemption Report - Entitlement Redemption Redeemed Value Chart

- Entitlement Redemption Sales Value Trend Chart - Displays the total sales value for the Offer for each date.

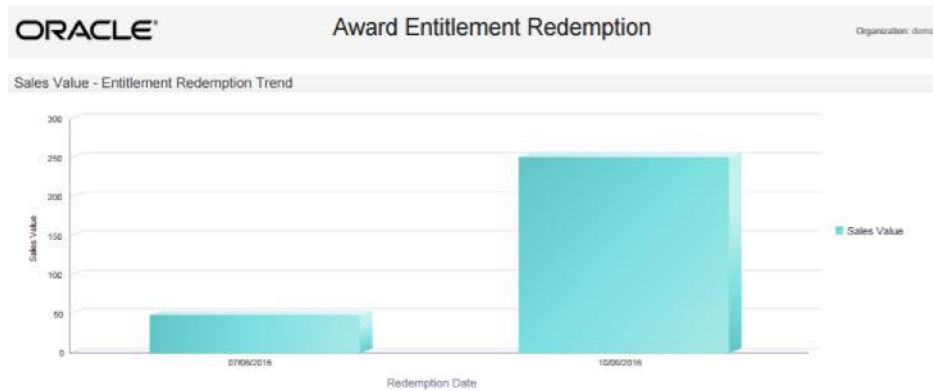


Figure 9-11: Award Entitlement Redemption Report - Entitlement Redemption Sales Value Chart

- Entitlement Redemption Discount Rate Trend Chart - Displays the discount percentage for the Offer for each date.

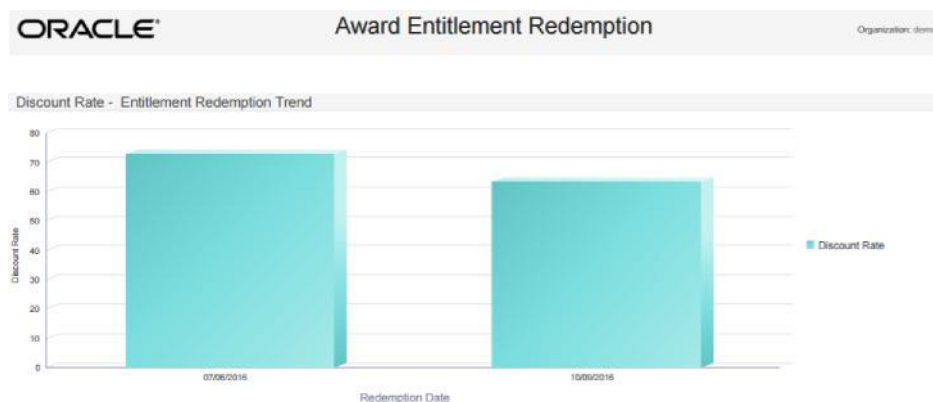


Figure 9-12: Award Entitlement Redemption Report - Entitlement Redemption Discount Rate Chart Report Contents

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 Locations selected when generating the report. Set to ALL if there was no restriction.
- Offer ID - The ID of the Offers selected when generating the report. Set to ALL if there was no restriction.
- Detail Information:
 - Offer ID - The ID identifying an Offer.
 - Offer Name - The name of an Offer. For each Offer included on the report:
 - Offer Type - Describes the type of Offer. 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 Offer is currently Active or Inactive.
- Redemption Rate - The Redemption Count / the Issue Count for the Offer on the date, presented as a percentage.
- Discount Rate - The average discount applied for the Offer on the date, presented as a percentage.
- Redeemed Value - The total value of the redemptions for the Offer on the date.
- Sales Value - The total value of all sales for the date.
- Issue Count - The number of times the Offer was issued for the date.
- Redemption Count - The number of times the Offer was redeemed for the date.
- Totals for the Offer Type:
 - Redemption Rate - The Redemption Count / the Issue Count for the Offer and Offer Type, presented as a percentage.
 - Discount Rate - The average discount applied for the Offer and Offer Type, presented as a percentage.
 - Redeemed Value - The total value of the redemptions for the Offer and Offer Type.
 - Sales Value - The total value of all sales for the Offer and Offer Type.
 - Issue Count - The number of times the Offer and Offer Type was issued.
 - Redemption Count - The number of times the Offer and Offer Type was redeemed.
- Totals for the Offer:
 - Redemption Rate - The Redemption Count / the Issue Count for the Offer, presented as a percentage.
 - Discount Rate - The average discount applied for the Offer, presented as a percentage.
 - Redeemed Value - The total value of the redemptions for the Offer.
 - Sales Value - The total value of all sales for the Offer.
 - Issue Count - The number of times the Offer was issued.
 - Redemption Count - The number of times the Offer 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 Offers included on the report were issued.
 - Redemption Count - The number of times the Offers included on the report were redeemed.

Award Entitlement Summary Report

This report displays the number of Issued Coupons for each Offer 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:
- Offer ID - The ID identifying an Offer.
- Offer Name - The name of an Offer. For each Offer included on the report:
- Offer Typecode - Describes the type of Offer. Possible types:
 - Buy X Get Set
 - Buy X Get X
 - Buy X Get Y
 - Fixed Quantity/Price
 - Analytics/Reports 21-43
 - Gift with Purchase
 - Item Price Override
 - Kit

- Line Item Discount
- Nth Item Discount
- Transaction Discount
- Tiered Discount
- Status - Indicates whether the Offer 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 Programs 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 Programs 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 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 Criteria:

- 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 Programs 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 IDs selected when generating the report, or set to ALL if there was no restriction.
- Program ID - The program IDs 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 Offer 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 Coupon, Product, Message, and Award.
 - 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 IDs selected when generating the report, or set to ALL if there was no restriction.
- Program ID - The program IDs 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 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 Offer, 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 Offers 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.
- Offer ID / Name - The ID and Name identifying an Offer. All Offers are selected by default. Optionally, select Search to work with the list of eligible Offers, search based on Offer Name, or remove Offers 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 Offers 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 IDs selected when generating the report, or set to ALL if there was no restriction.
- Program ID - The program IDs selected when generating the report, or set to ALL if there was no restriction.
- Offer Name - The Offers 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 Offer 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.
 - Offer ID - Name - The unique numeric identifier for the Offer and the name describing the Offer.
 - Offer Type - Possible Offer 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 Offer.
 - Transaction Count - The total number of transactions using the Offer.
 - Direct Revenue - The total extended selling price of all line items sold for the Target that were associated with the Promotion and Offer.
 - Total Discount - Total amount of the discounts given through the Offer.
 - 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 IDs selected when generating the report, or set to ALL if there was no restriction.
- Program ID - The program IDs selected when generating the report, or set to ALL if there was no restriction.
- Location ID - The locations 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 IDs selected when generating the report, or set to ALL if there was no restriction.
- Program ID - The program IDs 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 IDs selected when generating the report, or set to ALL if there was no restriction.

- Campaign ID / Name - The Campaign IDs selected when generating the report, or set to ALL if there was no restriction.
- Customer Alt Key Type - The Customer alt key types selected when generating the report, or set to N/A if there was no restriction.
- Customer ID / Name - The Customer ID / Names selected when generating the report, or set to ALL if there was no restriction.
- Target Name - The Target names 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 Prefixes selected when generating the report, or set to ALL if there was no restriction.
- Card Series Sequence - The Card Series Sequence numbers 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 Prefixes selected when generating the report, or set to ALL if there was no restriction.
- Card Series Sequence - The Card Series Sequence numbers selected when generating the report, or set to ALL if there was no restriction.
- Serial Number - The Serial Numbers selected when generating the report, or set to ALL if there was no restriction.
- Batch Number - The Batch Numbers 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 Prefixes 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. 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 Customer Validation 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 a 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
 - Analytics/Reports 21-75
 - 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 Codes 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 a 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 Locations 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 IDs 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 IDs 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 Codes 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 types 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 Types 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 Cloud Services 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 Cloud Services 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 Cloud Services 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 Locations selected for inclusion on the report; otherwise, set to ALL.
- Postal Code - The Postal or Zip Codes 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 Locations selected for inclusion on the report; otherwise, set to ALL.
- **State** - The state or provinces 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 Locations 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 Locations 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 9-13 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 codes selected for inclusion on the report; otherwise, set to ALL.
- **Program ID** - The program IDs selected for inclusion on the report; otherwise, set to ALL.
- **Serial Number** - The serial numbers 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 Types 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 9-14: 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.

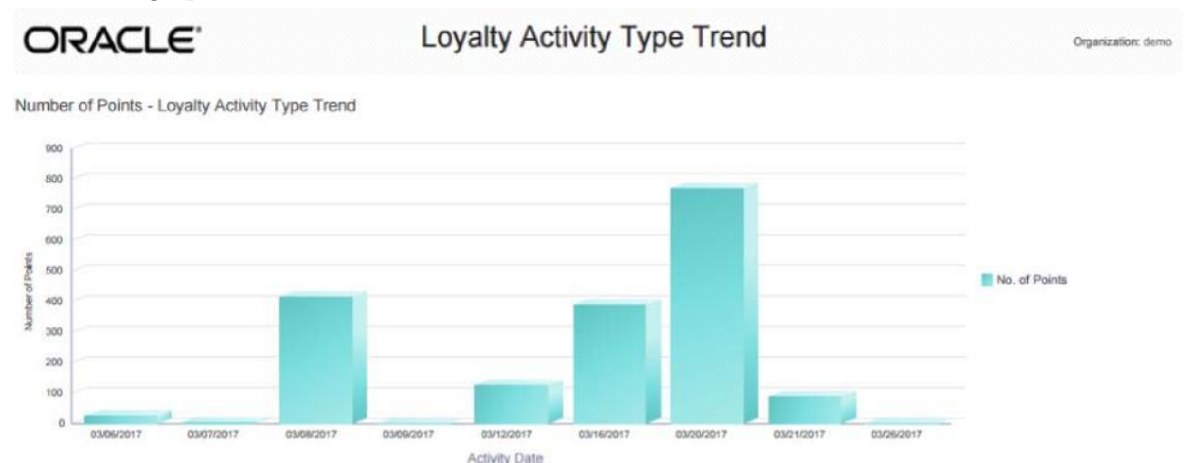


Figure 9-15: Loyalty Activity Type Trend Report - Number of Points Chart

- 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.



Figure 9-16: Loyalty Activity Type 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 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 IDs for Loyalty Levels selected when generating the report. Set to ALL if there was no restriction.
- Loyalty Rule ID - The numeric IDs for Rules 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 Types 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 9-17: 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.

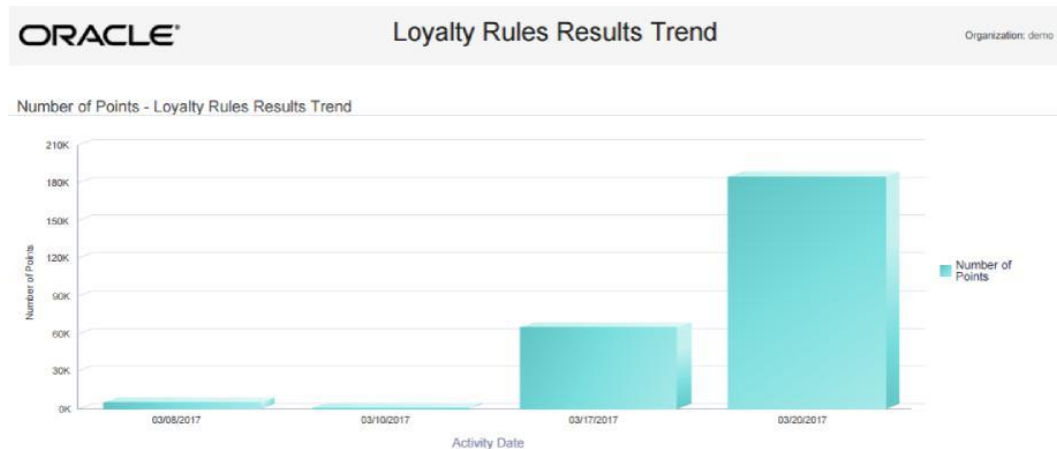


Figure 9-18: Loyalty Rules Results Trend Report - Number of Points Chart

- 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 9-19: 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 activities 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 YearIf 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 Programs selected when generating the report. Set to ALL if there was no restriction.
- Program Level - The numeric ID for the Loyalty Levels 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 Programs selected when generating the report. Set to ALL if there was no restriction.
- Program Level - The numeric ID for the Loyalty Levels 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.

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 Segments 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.
- Segment Name - The numeric ID for the Segments 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.
- Home Location - The Home Location specified for any Customers in the Segment, prefixed by Store Location.
- Location Name - The Name describing the Home Location.
- Customer Count - The number of Customers assigned to this Home Location for the Segment.
- Totals for Segment - The total number of Customers in the Segment assigned to Home Locations.
- Report Totals - The total Customer Count for all Segments included on the report.

Segment by State Report

This report presents a count of Customers, by the states or provinces for each primary or non-primary address, for each Customer Segment.

Customers who are not assigned to any address 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 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 Segments 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 Segments 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 Segments 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 Segments 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 Segments 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 as shown in [Figure 9-20](#).

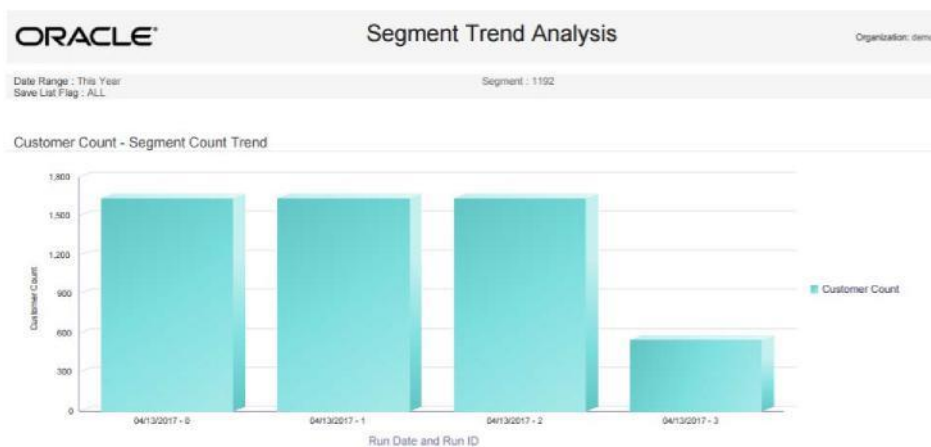


Figure 9-20: Segment Trend Analysis Report - Customer Count - Segment Count Trend Chart

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.

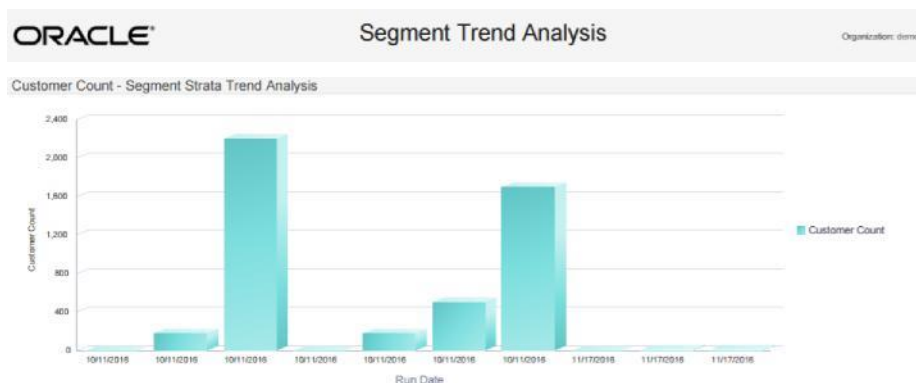


Figure 9-21: Segment Trend Analysis Report - Customer Count - Segment Strata Trend Analysis Chart

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.

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 in the following sections.

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 types selected when generating the report, or set to ALL if there was no restriction.
- Program ID - The program IDs 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.

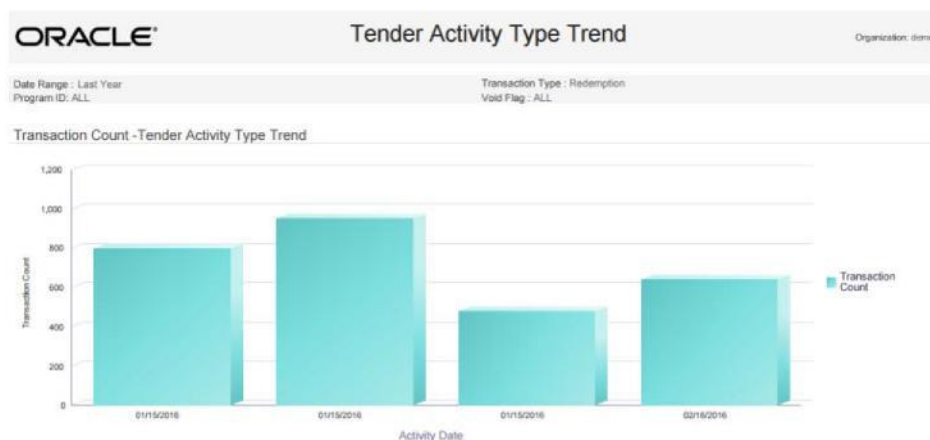


Figure 9-22: Transaction Count - Tender Activity Type Trend Chart

- Activity Amount Chart - Displays the total Activity Amount for each Business Date where the Transaction Type and Void Flag setting are the same

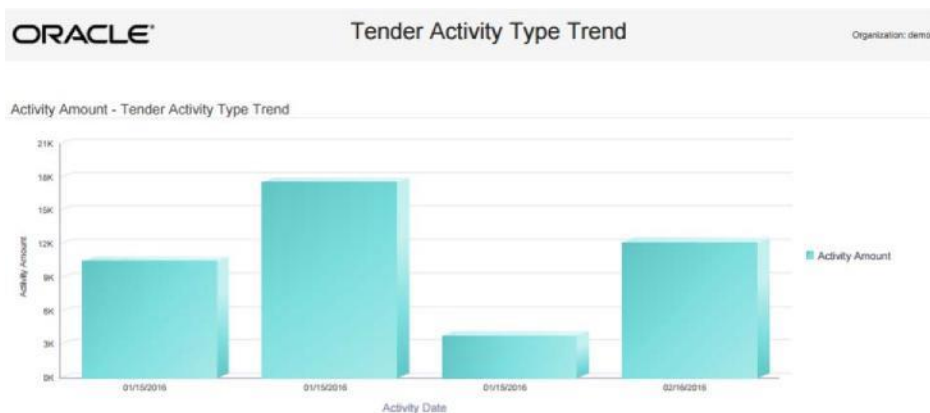


Figure 9-23: Activity Amount - Tender Activity Type Trend Chart

- Average Amount Chart - Displays the Average Amount for each Business Date where the Transaction Type and Void Flag setting are the same.

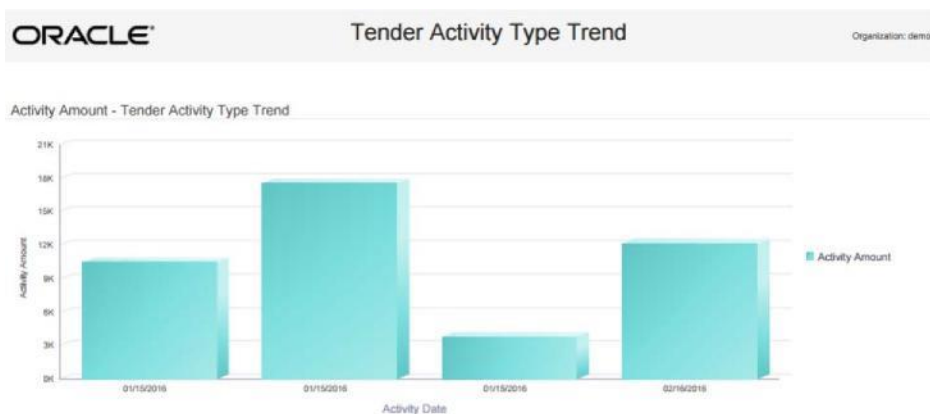


Figure 9-24: Average Amount - Tender Activity Type Trend Chart

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.

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 Customers selected when generating the report. Set to ALL if there was no restriction.
- Registry ID - The numeric ID for the Registries or Wish Lists 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.
- Purchased Quantity - The purchased quantity of the Item.
- Totals for Registry:
 - Desired Quantity - The total desired quantity of all Items on the Registry or Wish List that are included on the report.
 - Purchased Quantity - The total purchased quantity of all Items on the Registry or Wish List that are included on the report.
- Report Totals:
 - Desired Quantity - The total desired quantity of all Items included on the report.
 - Purchased Quantity - The total purchased quantity of all Items 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 IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- Task Type - The Task Types, if any, selected when generating the report. Set to ALL if there was no restriction.
- Associate ID - The Associate IDs, 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 IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- Task Type - The Task Types, if any, selected when generating the report. Set to ALL if there was no restriction.
- Associate ID - The Associate IDs, 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
- To do
- 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 IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- Associate ID - The Associate IDs, if any, selected when generating the report. Set to ALL if there was no restriction.
- Task Type - The Task Types, 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
 - To do
- 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.

Administration

Administration Features

The Administrative options available include the following:

- [Associate Role Definition](#)
 - [Adding an Associate Role](#)
 - [Editing an Associate Role](#)
- [Attribute Management](#)
 - [Creating an Attribute](#)
 - [Editing an Attribute](#)
 - [Deleting an Attribute](#)
- [Location Management](#)
 - [Adding a Location](#)
 - [Editing a Location](#)
- [Preference Types](#)
 - [Sorting a Preference Type](#)
 - [Adding a Preference Type](#)
 - [Editing a Preference Type](#)
 - [Viewing a Preference Type](#)
 - [Delete a Preference Type](#)
- [Task Management](#)
 - [Creating a Task](#)
 - [Editing a Task](#)
 - [Viewing a Task](#)
 - [Reassigning a Task](#)
- [Exchange Rate](#)

Associate Role Definition

Associate Roles are used to assign Associates to Customers. Only one Associate can be assigned to a Customer for each Associate Role, so the number of Associate Roles determines the number of Associates that can be assigned to a Customer.

Associate Role Definition

Actions ▾ + ✎ Sort By Primary ▾ Ascending ▾				
Role ID	Role Name	Description	Active	Primary
1	WSDL1-Wedding Planner	Wedding Planner	Yes	
2	WSDL2-Reception Coordinator	Wedding Reception Coordinator	No	
3	WSDL3-Bridal Dress Consultant	Wedding Bridal Dress Consultant	Yes	
4	WSDL4-Floral Designer	Wedding Floral Designer	Yes	
5	WSDL5-Cake Decorator	Wedding Cake Decorator	No	
6	WSDL6-Invitation Specialist	Wedding Invitation Designer	No	
7	WSDL7-Wedding Photographer	Wedding Photographer	Yes	

Figure 10-1: Associate Role Definition

To access the Association Role Definition window:

1. Click the **Tasks** icon.
2. Click the **Admin Task**.
3. Click the **Associate Role Definition Task**.

The following information is displayed for each role:

- **Role ID** - Displays the ID of the Associate Role.
- **Role Name** - This field contains the name of the Associate Role.
- **Description** - This field contains a description of the Associate Role.
- **Active** - This field indicates whether the Associate Role is active.
- **Primary** - This field indicates whether the Associate Role is the primary role.

Sorting Associate Role Definitions

The user can sort the list to refine the results. The following sorting options include:

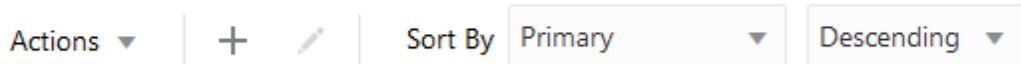


Figure 10-2: Sorting Options

The following fields can be sorted **Ascending** or **Descending**:

- **Active** - Indicates whether the Associate Role is active.
- **Description** - Description of the Associate Role.
- **Primary** - Indicates whether the Associate Role is the primary role.
- **Role ID** - Unique ID for the Associate Role.
- **Role Name** - Name of the Associate Role.

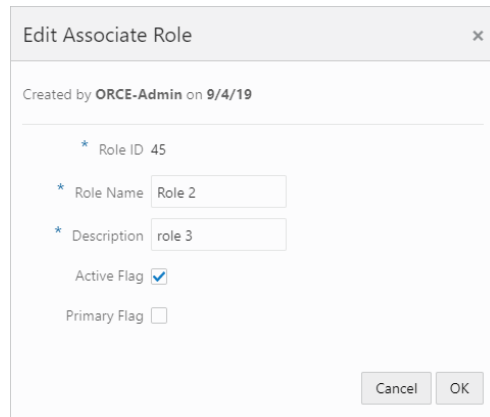
Adding an Associate Role

1. Click the **Add (+) icon**, or choose **Add** from the **Actions** menu. This displays a Create Associate Role window where you can enter the following information:
 - **Role Name** - This field configures the name of the Associate Role.
 - **Description** - This field configures a description of the Associate Role. This is a required field.
 - **Active** - This check box determines whether the Associate Role is active. As a default, the check box is selected.
 - **Primary** - This check box determines whether the Associate Role is the primary role. Note that Customer Engagement only allows one Associate Role to be primary.
2. Click **OK**. This adds the new Associate Role to the list of definitions. Or click **Cancel** to return to the original window without saving.

Editing an Associate Role

To edit an Associate Role, do the following:

1. **Highlight** the desired Associate Role (Only one record can be selected at a time for editing).
2. Click the **Edit** icon, or choose **Edit** from the **Actions** menu. This displays an Edit Associate Role window: This displays a screen with details of the role:



Created by **ORCE-Admin** on 9/4/19

* Role ID 45

* Role Name

* Description

Active Flag ☒

Primary Flag ☐

Cancel OK

Figure 10-3: Edit Associate Role

3. Make any necessary change to the fields.
4. Click **OK** to accept the changes. The Associate Role is displayed with the new information. Or click **Cancel** to return to the original window without saving.

Attribute Management

Use the Attribute Management window to create, edit, or delete attributes.

Attribute Management

Actions + - ✕ Intended Use Location Sort By ID Ascending

ID	Name	Unique	Description	Editable	Open Access	Data Type	Last Update	Intended Use	Attribute Group
81	ADDITIONAL-SERVICES	No	Special Services Offered by Store	Yes	Yes	Character	5/21/15	Location	
82	GRAND-OPENING-DATE	Yes	Grand Opening Date for Location	Yes	Yes	Date	5/21/15	Location	
83	ADDITIONAL-DEPARTMENTS	No	Additional Store Departments	Yes	Yes	List	7/16/15	Location	
84	INTERNET-SALES?	Yes	Sells via Internet?	Yes	Yes	Logical	12/4/17	Location	
85	AVG-DAILY-SALES	Yes	Average Daily Sales	Yes	Yes	Currency	5/21/15	Location	
86	AVG-DAILY-CUSTOMER-COUNT	Yes	Average Daily Customer Count	Yes	Yes	Number	5/21/15	Location	
127	Region	No	Region	Yes	Yes	List	4/25/16	Location	
128	Chain	Yes	Chain	Yes	Yes	List	11/10/15	Location	
182	STORE-MANAGER	Yes	Name of store manager	Yes	Yes	Character	8/2/19	Location	Management
183	AREA-MANAGER	Yes	Name of Area Manager	Yes	Yes	Character	8/28/17	Location	Management

Figure 10-4: Attribute Management

To access the Attribution Management window:

1. Click the **Tasks** icon.
2. Click the **Admin Task**.
3. Click the **Attribute Management Task**.

The following information is displayed for each attribute:

- **ID** – The ID for the attribute.
- **Name** – The name of the attribute.
- **Unique** – Only one value can be added to the attribute when it is identified as unique.
- **Description** – Description of the information provided by the attribute.
- **Editable** – Identifies whether the associate is allowed to edit the value for the attribute once it is added.
- **Open Access** – Indicates whether there is open access to this attribute.
- **Data Type** – The type of data contained in the attribute value. Possible values include: Character, Number, Currency, Date, Logical, and List.

- **Last Update** – The date last updated in the system.
- **Intended Use** – The Customer Engagement element the attribute was created for. Possible uses include: Card, Card Series, Card Type, Customer, Gift Registry, Item Location, Offer, Promo Offer, Promotion, Segment, and Wish List.
- **Attribute Group** – The group associated with the attribute.

Filtering and Sorting Attributes

The user can narrow down the list by selecting any of the Intended Use filters. The list can then be sorted by the fields as shown in [Figure 10-5](#).



Figure 10-5: Filtering and Sorting Options

Intended Use – Filters include:

- All (Default)
- Card
- Card Series
- Card Type
- Customer
- Gift Registry
- Item Location
- Offer
- Promo Offer
- Promotion
- Segment
- Wish List

The following fields can be sorted **Ascending** or **Descending**:

- Attribute Group
- Data Type
- Description
- ID
- Intended Use
- Last Update
- Name

Creating an Attribute

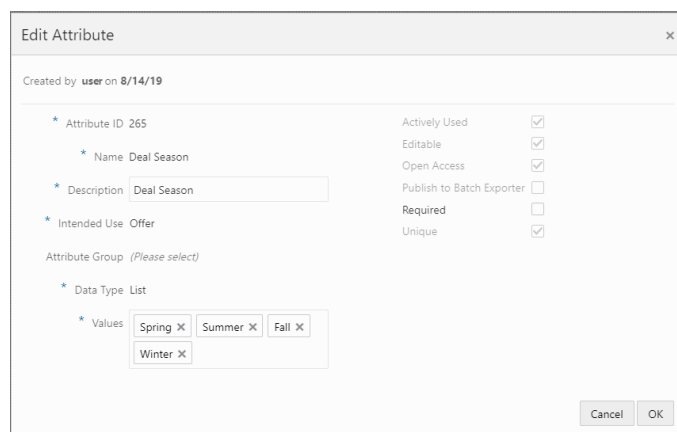
1. Click the **Add (+) icon**, or choose **Add** from the **Actions** menu. This displays a Create Attribute dialog, where you can enter the following information:

Figure 10-6: Create Attribute

- **Name** – Name of the attribute (required field).
 - **Description** – Description of the attribute (required field).
 - **Intended Use** – The Customer Engagement element the attribute was created for (required field).
 - **Attribute Group** – The group associated with the attribute. Required for Gift Registry Intended Use, otherwise, optional.
 - **Data Type** – The type of data contained in the attribute value. Possible values include: Character, Number, Currency, Date, Logical, and List (required field).
2. Depending on your previous selections the following fields are **dynamic**:
 - **Editable** – Indicate whether the attribute will be editable.
 - **Open Access** – Indicate whether the attribute has open access.
 - **Publish to Batch Exporter** – A flag to indicate export to a marketing system.
 - **Required** – Adds a flag to make the attribute required
 - **Unique** – Indicates whether the attribute can be assigned to an element more than once.
 3. Click **OK**. This adds the new attribute to the list of attributes. Or click **Cancel** to return to the original window without saving.

Editing an Attribute

1. Highlight the **row** of the desired attribute.
2. Click the **Edit** icon, or choose **Edit** from the **Actions** menu. This displays an **Edit Attribute** dialog that displays a screen with details of the attribute:



Created by user on 8/14/19

* Attribute ID 265

* Name Deal Season

* Description Deal Season

* Intended Use Offer

Attribute Group (Please select)

* Data Type List

* Values Spring X Summer X Fall X Winter X

Actively Used ☒

Editable ☒

Open Access ☒

Publish to Batch Exporter ☐

Required ☐

Unique ☒

Cancel OK

Figure 10-7: Edit Attribute

Note: Attributes that are actively used (already associated to an element in Customer Engagement) are limited to what fields may be changed, such as Description.

3. Make any necessary changes to the fields.
4. Click **OK** to accept the changes. The attribute is displayed with the new information. Or click **Cancel** to return to the original window without saving.

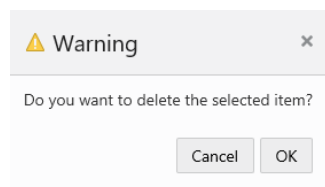
Deleting an Attribute

Use the following steps to delete an Attribute:

1. Highlight the row of the **Attribute**.

Note: Actively used attributes **cannot** be deleted, so highlighting such a row will **not** enable the delete action or the delete icon.

2. Click **Delete** from the Actions menu or the **Delete** icon. This opens the delete confirmation window.



Warning

Do you want to delete the selected item?

Cancel OK

Figure 10-8: Warning

3. Click **OK** to delete the attribute or **Cancel** to close the window without deleting the row.



Attribute has been successfully deleted.

Dismiss

Figure 10-9: Confirmation Notification

Note: A confirmation notification appears to confirm the attribute has been deleted.

Location Management

Use the Location Management window to add or edit a location.

To access the Location Management window:

1. Click the **Tasks** icon.
2. Click the **Admin** Task.
3. Click the **Location Management** Task.

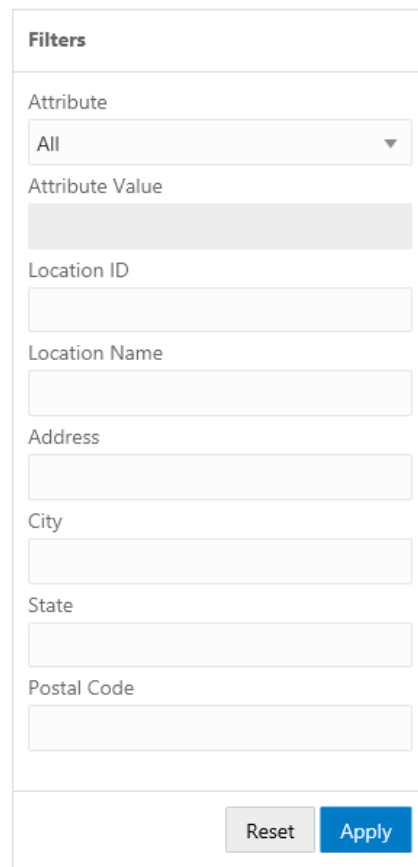
The following information is displayed for each location:

- **Location ID** – Unique ID of the Location.
- **Location Name** – Name of the Location.
- **Address** –Address 1 of the Location.
- **Franchisee Location** – Indicates whether the Location is a Franchisee.
- **Active** – Indicates whether the Location is currently active.

The Location Management window shows the first 25 locations, displayed in Location ID ascending order. You can click the **Show More...** link to show the next 25 locations or filter the results by completing the following steps:

Filtering the Results

1. Enter the information in any available following fields:



The screenshot shows a 'Filters' form with the following fields:

- Attribute**: A dropdown menu currently set to 'All'.
- Attribute Value**: A greyed-out text input field.
- Location ID**: A text input field.
- Location Name**: A text input field.
- Address**: A text input field.
- City**: A text input field.
- State**: A text input field.
- Postal Code**: A text input field.

At the bottom right of the form are two buttons: a grey 'Reset' button and a blue 'Apply' button.

Figure 10-10: Filter Options

- **Attribute** – Additional, descriptive information about a Customer Engagement element.
 - **Attribute Value** – This is a dynamic field based on the attribute previously selected.
 - **Location ID** – Unique ID for the Location.
 - **Location Name** – Name of the Location.
 - **Address** – Address 1 of the Location.
 - **City** – City of the Location.
 - **State** – State or Province of the Location.
 - **Postal Code** – Postal Code or Zip Code of the Location.
2. Click **Apply** to filter the results, or click **Reset** to clear the fields.

Note: The results remain the same even if you click **Reset**. **Reset** only clears the previously entered filter criteria. The results will only refresh when another filter is configured.

Adding a Location

Use the following steps to add a location:

Location Information

1. Click the **Add (+) icon**, or choose **Add** from the **Actions** menu. This displays a **Create Location** window where you can enter the following information:

Figure 10-11: Create Location

2. Enter the values for the following fields:
 - **Location ID** - Unique ID of the Location (Required field).
 - **Location Name** - Name of the Location (Required field).
 - **Active** - Indicates whether the Location is currently active. The default is checked.
 - **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 (optional).
3. Either **continue** to the Location Attributes section or, if no Location Attribute additions are required, Click **OK** to create the Location or click **Cancel** to close the window without saving.

Location Attributes

If configured, the user can Add, Edit, or Delete Location Attributes

Adding a Location Attribute

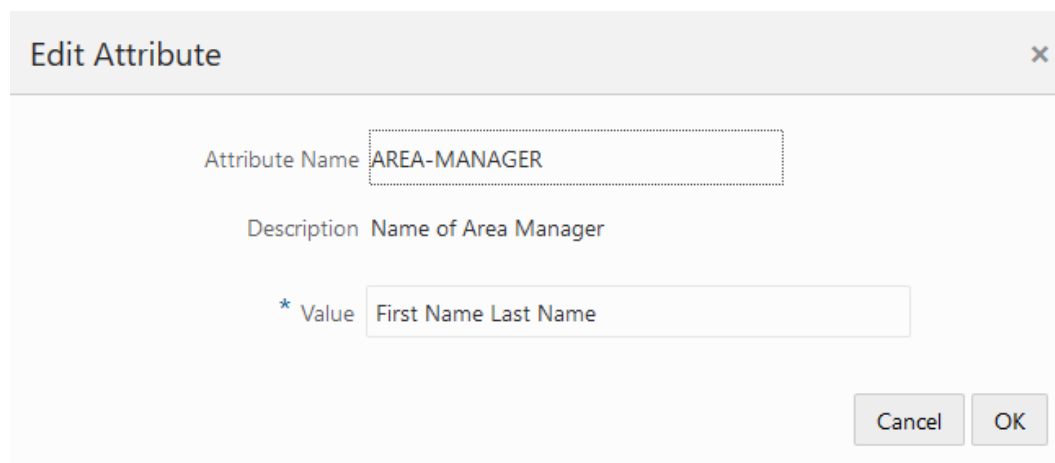
1. To add a Location attribute, click the **Action Menu** and click **Add** or click the **Add (+) icon**. This displays a **Create Attribute** window where you can enter the following information:

Figure 10-12: Create Location Attribute

- Click the **Attribute Name** list.
 - The Value field is **dynamic** and is based off of the data type of the attribute. The user either enters a **value** or selects a value from the list.
2. Click **OK**. This adds the new Location Attribute. Or select **Cancel** to close the window without adding the location attribute.

Editing a Location Attribute

1. To edit a Location attribute, highlight the Location Attribute and click the **Action Menu**, then click **Edit**, or click the **Edit icon**.



The 'Edit Attribute' dialog box has a title bar with the text 'Edit Attribute' and a close button (X). Inside, there are three input fields: 'Attribute Name' with the value 'AREA-MANAGER', 'Description' with the value 'Name of Area Manager', and a required field marked with an asterisk (*) 'Value' with the value 'First Name Last Name'. At the bottom right, there are two buttons: 'Cancel' and 'OK'.

Figure 10-13: Edit Attribute

2. Edit the location attribute value.
3. Click **Ok** to accept the change or **Cancel** to close without saving.

Deleting a Location Attribute

1. To delete a Location Attribute, highlight the row of the location attribute and from the Action menu, click **Delete**, or click the Delete X icon.

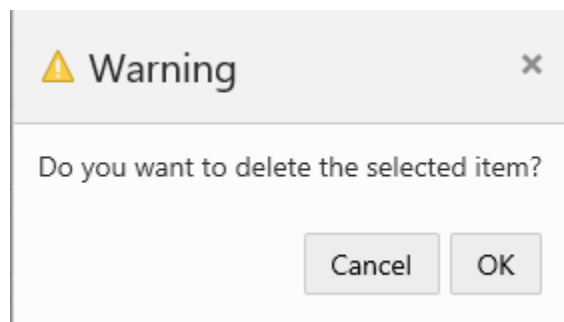


Figure 10-14: Warning

2. Click **OK** to delete the Location Attribute, or **Cancel** to return to the list of Location Attributes.
3. Once all Location Attributes are determined, click **OK** to create the location, or **Cancel** to close the window without saving.

Editing a Location

To edit the information in the Location Information, and/or Location Attribute sections for the Location, select the location from the Location Management window.

1. Click the **Edit** icon, or choose **Edit** from the **Actions** menu. This displays an Edit Location window which displays a screen with details of the location:

Edit Location

Created by **ttest** on 8/22/19

Location Information

* Location ID 011

* Location Name 011

Location Number

E-Mail Address

Active ☒

Address Line 1

Address Line 2

Address Line 3

Address Line 4

City

State

Postal Code

County

Country

Franchisee (Please select)

Location Attributes

Actions + - ✕

No attributes assigned

Figure 10-15: Edit Location

2. Make any necessary change to the Location Information fields, and/or the Location Attributes values.
3. Click **OK** to accept the changes. The location is displayed with the new information. Or click **Cancel** to close without saving.

Preference Types

Preference Types are methods in which a customer can receive promotional information from the retailer. In this section, you can **sort**, **add**, **edit**, **view**, and **delete** preference types, so that you can setup unlimited preference types to use with the Customer Preference Center. To access Preference Types:

1. Click the **Tasks** icon.
2. Click the **Admin Task**.
3. Click the **Preference Types** Task.

Preference Types

Actions + - ✕

Sort By Preference Type ID Ascending

Preference Type ID	Preference Type Name	Default Frequency
1	NEWSLETTER	WEEKLY
2	MONTHLY_SALES_FLYER	MONTHLY
3	CLEARANCE_ITEMS	MONTHLY
4	SPECIAL SALES	MONTHLY
5	BLACK FRIDAY DEALS	ANYTIME
8	WEEKLY_SALES_FLYER	WEEKLY

Figure 10-16: Preference Types

Sorting Preference Types

You can sort by:

- Default Frequency

- Preference Type ID
- Preference Type Name

Preference types can be sorted ascending or descending from the list.

Adding a Preference Type

1. To add a Preference Type, click the **Action Menu** and click **Add**, or click the **Add (+) icon**. This displays the Create Preference Type window where you can enter the following information:

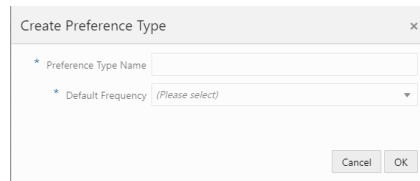
A screenshot of the 'Create Preference Type' dialog box. It has a title bar with a close button (X). Inside, there are two required fields marked with an asterisk: 'Preference Type Name' and 'Default Frequency (Please select)'. The 'Default Frequency' field is a dropdown menu. At the bottom right, there are 'Cancel' and 'OK' buttons.

Figure 10-17: Create Preference Type

2. Type a **Preference Type Name** and choose one of the following default frequencies – **both** fields are **required** (these frequencies are configurable).
 - Anytime
 - Weekly
 - Monthly
 - Yearly
 - Daily
 - Quarterly
3. Click OK to add the new Preference Type. Or click Cancel to close the window.

Editing a Preference Type

1. To edit a Preference Type, highlight the row of the **Preference Type** you want to edit and click the Actions menu or the Edit icon to open the Edit Preference Type window.

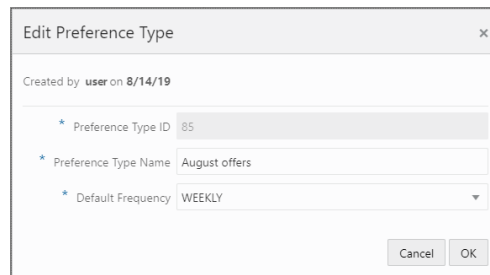
A screenshot of the 'Edit Preference Type' dialog box. It has a title bar with a close button (X). Below the title bar, it says 'Created by user on 8/14/19'. There are three fields: 'Preference Type ID' (displaying '85'), 'Preference Type Name' (displaying 'August offers'), and 'Default Frequency' (displaying 'WEEKLY' in a dropdown menu). At the bottom right, there are 'Cancel' and 'OK' buttons.

Figure 10-18: Edit Preference Type

2. Edit the Preference Type Name or select a different Default Frequency and click OK. Or Click cancel to close the window and discard any changes.

Viewing a Preference Type

1. To View a Preference Type, highlight the row of the **Preference Type** you want to view.
2. Click the Actions menu or the View icon to open the View Preference Type window.

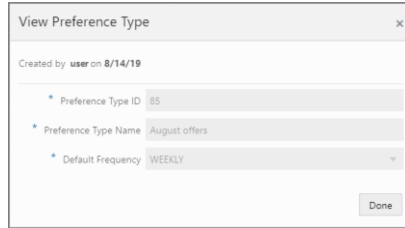


Figure 10-19: View Preference Type

1. View the details of the Preference Type and click **Done** to close the window

Delete a Preference Type

1. To delete a Preference Type, highlight the row of the **Preference Type** you want to delete.
2. Click the **Actions** menu Delete option, or the **Delete** icon which opens the delete confirmation window.
3. Click **OK** to delete the Preference Type or **Cancel** to close the window **without** deleting the row.

Note: A confirmation notification appears to confirm the Preference Type has been deleted.

Task Management

Use the Task Management window to search for tasks, as well as to add, edit, and assign tasks.

To access the Task Management window:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **Task Management** task. The Task Management window displays.

Figure 10-20: Search Panel Options

4. The Search panel enables you to enter criteria to search for a specific task. Enter the desired search criteria which includes the following fields:
 - **Assigned User ID** – ID of the assigned user
 - **Assigned User Name** – Name of the assigned user
 - **Task Name** – Name of the Task
 - **Creator** – ID of the user who created the Task
 - **Start Date Range From and To** – Dates on which the Range starts
 - **End Date Range From and To** – Dates on which the Range ends
 - **Task ID** – ID of the Task
 - **Task Type** – Type of Task
 - **Status** – Status of the task
 - **Priority** – The priority assigned to the task
 - **Location** – Location of the task
 - **Event** – The promotion assigned to the task
 - **Assigned Customer ID** – ID of the assigned customer
 - **First Name** – First name of the customer
 - **Last Name** – Last name of the customer
5. Click **Search** to see the results.

Note: The results will remain the same if the **Reset** button is clicked. The **Reset** button only clears the **previously** entered search criteria. The results will only refresh when another search is completed.

Actions ▾	+	✎	☒	👤	Sort By	Start Date ▾	Ascending ▾		
Task ID	Task Name	Start Date	End Date	Task Type	Creator	Status	Assigned To	Customer	
1508	WSDL- TestCase1.0-TaskGenerator	5/27/15	6/26/15	TASK	Relate	OPEN			
3829	Appointment about sale	4/30/19	4/30/19	APPOINTMENT		IN_PROGRESS			

Figure 10-21: Results Pane

Note: The results pane shows the first 25 results. Click the Show More... link to see the next 25 results.

[Show More...](#) 1-25 of 5000 items

Figure 10-22: Show More link

The following information is displayed for each task:

- **Task ID** – The ID of the task.
- **Task Name** – The name of the task.
- **Start Date** – The date the task starts.
- **End Date** – The date the task ends.
- **Task Type** – The type of task.
- **Creator** – User who created the task.
- **Status** – The status of the task.
- **Assigned To** – The associate to whom the task is assigned.

- **Customer** – Name of the customer.

Sorting Results

Once the results appear the user can sort the list to refine the results. The following sorting options include:



Figure 10-23: Sort By Options

The following fields are sorted **Ascending** or **Descending**:

- **Assigned To** - The associate to whom the task is assigned.
- **Creator** - User who created the task.
- **Customer** - Name of the customer.
- **End Date** - The date the task ends.
- **Start Date** - The date the task starts.
- **Status** - The status of the task.
- **Task ID** - The ID of the task.
- **Task Name** - The name of the task.
- **Task Type** - The type of task.

Creating a Task

Users with the appropriate access level can add a task. To Create a Task:

1. Click the **Add (+)** icon, or choose **Add** from the **Actions** menu. This displays a **Create Task** window.

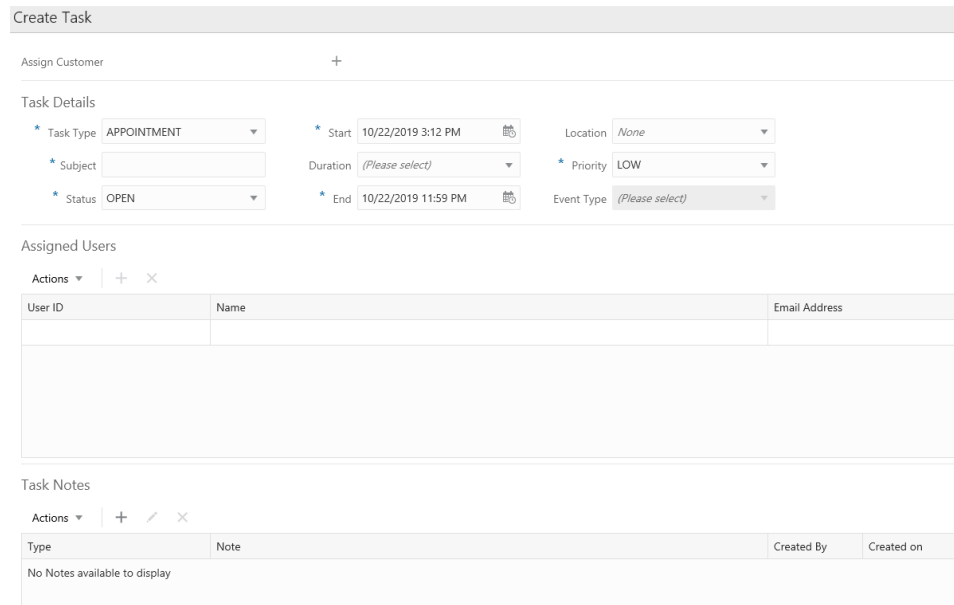


Figure 10-24: Create Task

Assigning Customers

1. Click the **Assign Customer** Plus icon to assign a customer to the Task (optional).

Figure 10-25: Edit Assigned Customer

2. Enter some or all of a customer's **name** in the Search for Customer field. The user can search by any of the criteria shown in the search results including:
 - Name
 - Email Address
 - Phone Number
 - Customer ID
 - Alternate Key
3. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
4. Click **Search**.
5. Click **Assign** to assign the customer to the task.
6. Click **OK** to save the assignment or **Cancel** to return to the Task Details without saving any customer assignments.

Task Details

1. Enter the **Task Details** which include the following fields:

Figure 10-26: Edit Task Details

- **Task Type** – Type of task (required field)
- **Subject** – The subject of the task (required field)
- **Status** – The status of the task (required field)
- **Start** – The date and time the task starts (required field)
- **Duration** – The duration of the task
- **End** – The date and time the task ends (required field)
- **Location** – The location of the task
- **Priority** – The priority assigned to the task (required field)
- **Event Type** – Type of event (only used for Event Type tasks)

Assigning Users

1. To add a user click the **Actions Menu** and click **Add** or click the **Add (+) icon**.

Figure 10-27: Add User to Task

2. Enter some or all of a user's name in the **Search for User** field. The user can search by any of the criteria shown in the search results including:
 - User ID
 - Name
 - Email Address
 - Location ID
3. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
4. Click **Search**.
5. Click **Assign** to assign the user to the task.
6. Click **OK** to save the assignment or **Cancel** to return to the Task Details without saving any user assignments.

Deleting Users

1. Highlight a user from the Assigned Users section.
2. Click **Remove** from the Actions Menu or click the **X** icon.

Note: To immediately remove the user, click **X**.

Task Notes

1. To add a note click **Add** from the Actions Menu or click the **Plus** icon.

Figure 10-28: Create Note for Task

2. Select a note **Type** (required field).
3. Enter information in the Note field (required field)
4. Click **OK**.
5. To edit a note, **highlight** a note in **Task Notes** section and click **Edit** from the Actions Menu or click the **Edit** icon.
6. **Edit** the note.
7. Click **OK** to accept the changes or **Cancel** to close without saving.
8. To delete a note, highlight a note in Tasks Notes section and click **Delete** from the Actions Menu or click the X icon.

Note: To immediately remove the user, click **X**.

Task Confirmation

1. Click **OK** to create a task or **Cancel** to close the Create Task window without saving any changes.

Editing a Task

To edit a task use the following steps:

1. Highlight a **Task** row.
2. Click the **Action** Menu, and then click **Edit**, or click the **Edit** icon.
3. Edit the **Task**.
4. Click **OK** to accept the changes or **Cancel** to close the task **without** saving.

Viewing a Task

To View a task use the following steps.

1. Highlight a **Task** row.
2. Click the **Action** Menu, and then click **View**, or click the **Eyeglasses** icon.
3. When finished viewing, click **Done**.

Re-Assigning Tasks

Users with the appropriate permissions can reassign a task. To reassign a task:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **Task Management** task. The **Task Management** window displays.

Actions ▾	+	✎	☐	👤	Sort By	Start Date ▾	Ascending ▾	
Task ID	Task Name	Start Date	End Date	Task Type	Creator	Status	Assigned To	Customer
343463	Create New Sales	10/1/19	10/1/19	APPOINTMENT	user	OPEN	user	FirstName Surname

Figure 10-29: Task Management Window

4. Highlight a **task** you wish to reassign.
5. Click the **Actions** menu and choose Re-Assign, or select the Person icon from the menu row toolbar. This opens the Re-AssignTask dialog window.

User ID	Name	Email	Manager	Assign To Task
user	user	user	None	

Figure 10-30: Re-Assign Task Window

- Expand the list of users and from the list of available users, and click **Assign** to reassign the task.
- Click **OK** to assign the task. A **Warning** window displays notifying that a different user will be assigned the task.
- Click **OK** to accept ownership of the task. The task is reassigned to another user.

Exchange Rate

You can use the Exchange Rate feature to review the most current exchange rates that have been set up for currency conversions for PosLog transactions. You can also review previous Exchange Rates, as well as 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 Service Implementation Guide* for more information on assigning User Roles.

Accessing the Exchange Rate Feature

To access the Exchange Rate feature do the following:

- Click **Menu**.
- Click the **Admin** task.
- Click the **Exchange Rate** task. The Exchange Rate window displays.

Exchange Rate

Actions	+	-	↺	Sort By	Create Date	Descending
Base Currency	Exchange Currency	Exchange Rate	Effective Date	Create Date	Create User ID	
Japan, Yen	Kuwait, Dinars	0.003218	11/8/16 12:00 PM			
United States of America, Dollars	Kuwait, Dinars	0.29005	11/8/16 12:00 PM			
United States of America, Dollars	Japan, Yen	91.149394	11/8/16 12:00 PM			
Mexico, Pesos	United States of America, Dollars	0.080254	11/8/16 12:00 PM			
Mexico, Pesos	Kuwait, Dinars	0.023284	11/8/16 12:00 PM			
Mexico, Pesos	Japan, Yen	7.234366	11/8/16 12:00 PM			
Japan, Yen	United States of America, Dollars	0.010971	11/8/16 12:00 PM			
Kuwait, Dinars	Japan, Yen	310.692405	11/8/16 12:00 PM			
Kuwait, Dinars	Mexico, Pesos	42.946732	11/8/16 12:00 PM			
Kuwait, Dinars	United States of America, Dollars	3.44768	11/8/16 12:00 PM			

Figure 10-31: Exchange Rate 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.
- **Effective Date** - The most current Exchange Rate that has been defined for the currency conversion, with the rate displaying up to 6 decimal positions. Any Exchange Rates with a future Effective Date are not displayed.
- **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.

Working with the Exchange Rates

Sorting Results

Exchange Rate		
Actions ▼	+ ⌂ ↺	Sort By Create Date ▼ Descending ▼
Base Currency	Exchange Currency	Exchange Rate
Japan, Yen	United States of America, Dollars	0.010971
Mexico, Pesos	Kuwait, Dinars	0.023284

Figure 10-32: Sort By Options

In the Exchange Rates window, the user can sort the list to refine the results. Results can be sorted **Ascending** or **Descending** using the following sorting options:

- Base Currency
- Create Date (Default)
- Create User ID
- Effective Date
- Exchange Currency
- Exchange Rate

Viewing Exchange Rate History

To view an Exchange Rate History do the following:

1. **Highlight** an Exchange Rate from the list of results.
2. Click the **Actions Menu**, and then click **View**, or click the **View** icon. The Exchange Rate History window displays the history of that Exchange Rate in descending date order.

Exchange Rate	Effective Date	Create Date	Create User ID
91.149394	11/8/16 12:00 PM		
91.149394	11/3/16 12:00 PM		
91.149394	10/27/16 12:00 PM		
91.149394	9/15/16 12:00 PM		
0.1	8/3/16 12:00 AM	8/3/16 1:18 PM	
91.149394	2/1/16 12:00 PM		
91.149394	1/29/16 12:00 PM		
91.149394	1/27/16 12:00 PM		
91.149394	1/26/16 12:00 PM		
91.149394	8/17/15 12:00 PM		
91.149394	7/29/15 12:00 PM		

Figure 10-33: Exchange Rate History

- **Exchange Rate** - The Exchange Rates defined for the conversion of the Base Currency to the Exchange Currency.
- **Exchange Rate Date** - The date and time when the Exchange Rate becomes 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.

3. Click **Done** to close the window and return to the **Exchange Rate Window**.

Creating a New Exchange Rate

To create a new Exchange Rate for a currency conversion do the following:

1. Click the **Actions Menu**, and then click **Add**, or Click the **Add (+)** icon. The Create Exchange Rate window displays.

Create Exchange Rate	
Base Currency	Georgia, Lari
Exchange Currency	Czech Republic, Koruny
* Exchange Rate	3.14159
Effective Date	03/10/20 12:00 AM
Cancel OK	

Figure 10-34: Create Exchange Rate

2. Enter the following information:
 - **Base Currency** - Select the basic currency from the list.
 - **Exchange Currency** - Select the Exchange Currency from the list.
 - **Exchange Rate** - Enter the Exchange Rate to use when converting the Base Currency to the Exchange Currency. The value entered can include up to 11 positions before the decimal and up to 6 after.

- Effective Date and Time - Use the Calendar picker to select the date and time which the rate will be effective. The date/time can be in the past or in the future. If an existing Exchange Rate for the specified date and time currently exists, the page displays an error.
- 3. Click **OK** to accept the changes or **Cancel** to close the task without saving. If you select **OK**, you will receive a confirmation at the bottom of the screen confirming the new exchange rate was successfully added. You will be returned to the Exchange Rate window where the new exchange rate you just created now displays at the top of the list.
- 4. You can refresh the Exchange Rate list by clicking the **Refresh** icon or picking the **Refresh** option from the Actions menu.

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.

Note: This option is available only if the user has been assigned the *SystemAdmin* role. See the *Oracle Retail Customer Engagement Cloud Service Implementation Guide* for more information on assigning User Roles.

Accessing Security Groups

To access the Security Groups do the following:

1. Click **Menu**.
2. Click the **Admin** task.
3. Click the **Security Groups** task. The Security Groups window displays.

Security Groups

Actions ▾

+







Sort By

Group ID ▾

Ascending ▾

Group ID	Group Name	Default Privilege	Active
1	GROUP-Associates	Read/Write	✓
2	GROUP-RO-Consultants	Read Only	✓
3	GROUP-LR-Specialists	Limited Read	✓
4	GROUP-NA-Designers	No Access	✓
5	GROUP-NA-Inactive	No Access	
6	GROUP-RW-Coordinators	Read/Write	

Figure 10-35: Security Groups

The following fields are displayed:

- Group ID – ID of the Security Group.
- Group Name – Name of the Security Group.
- Default Privilege – The access privileges given to Users in the Security Group. These access privileges are specific to the Customer. For a description of the Default Privilege Types, see [Security Group Privilege Types](#).
- Active – Indicates whether the Security Group will be Active or not.

Sorting Results

In the Security Groups window, the user can sort the list to refine the results (see [Figure 10-35](#)). Results can be sorted **Ascending** or **Descending** using the following sorting options:

- Active
- Default Privilege
 - Read/Write
 - Read Only
 - Limited Read
 - No Access
- Group ID (Default)
- Group Name

Working with the Security Groups

Creating a New Security Group

To create a new **Security Group** do the following:

1. Click the **Actions Menu**, and then click **Add**, or Click the **Add (+)** icon. The **Create Security Group** window displays.

Figure 10-36: Create Security Group

2. Enter the following information:
 - **Group ID** – (Read Only) Automatically assigned ID of the Security Group.
 - **Group Name** – (Required) The name you want to give to the Security Group.
 - **Active** – Indicates whether the Security Group will be Active or not.
 - **Default Privilege** – 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.
- 3. Select **OK** to save or **Cancel** to exit. You do not at this time have to add users. If you wish to associate users to the new group at this time, then proceed to the **Assign Users** section.

Assign Users

4. In the Assign Users section of the Create Security Group window, click the **Actions Menu**, and then click **Add**, or Click the **Add (+) icon**. The Assign Users window displays.

The screenshot shows the 'Assign Users' window. At the top is a search bar labeled 'Search for User' with a magnifying glass icon and a 'Search' button. To the right of the search bar are two radio buttons: 'Partial' (selected) and 'Exact'. Below the search bar is a table titled 'Search Results'. The table has five columns: 'User Id', 'Name', 'Email Address', 'Location Id', and 'Assign To Security Group'. The table is currently empty, with the text 'No users found using search criteria.' displayed below it. At the bottom right of the window are 'Cancel' and 'OK' buttons.

Figure 10-33: Assign Users

5. Enter a full or partial **User ID, Name, Email Address, or Location** in the Search for User field
6. Select **Partial**, if you want to results that match part of what you enter, or select **Exact** if you only want results that are an exact match.
7. Click **Search**. A list of users matching the search text is displayed in the Search Results grid.

The screenshot shows the 'Assign Users' window with the search term 'ORCE' entered in the search bar. The 'Partial' radio button is selected. The 'Search Results' table now contains two rows of data. The first row is for 'ORCE-AUTO' with the name 'ORCE Automation' and an email address. The second row is for 'ORCE-Admin' with the name 'ORCE- SystemAdmin' and an email address. In the 'Assign To Security Group' column, the first row has an 'Assign' button and the second row has an 'Unassign' button. At the bottom right are 'Cancel' and 'OK' buttons.

User Id	Name	Email Address	Location Id	Assign To Security Group
ORCE-AUTO	ORCE Automation	[redacted]		Assign
ORCE-Admin	ORCE- SystemAdmin	[redacted]		Unassign

Figure 10-37: Search Results Grid

8. For each user you wish to assign, click **Assign**.
9. For each user you wish to unassign, click **Unassign**.

10. Click **OK** to accept the changes, or **Cancel** to close the window without saving.
11. Click **OK** to save the new Security Group, or **Cancel** to close the window without saving.
12. Click the **Refresh** icon to update the Security Groups results.

Viewing Security Groups Details

To view Security Group Details do the following:

1. **Highlight** a Security Group from the list of results.
2. Click the **Actions Menu**, and then click **View**, or click the **View** icon. The **View Security Group** window displays.

Figure 10-39: View Security Group

The following information is displayed:

- **Group ID** - ID of the Security Group.
- **Group Name** - Name of the Security Group.
- **Active** - Indicates whether the Security Group Privilege is active or not.
- **Privilege Type** - Determine the access privileges given to Users in the Security Group.

3. Click **Done** to close the window and return to the Security Group window.

Editing an Existing Security Group

To edit the Security Group Details do the following:

1. In the Security Group window, **highlight** a Security Group you wish to edit.
2. Click the **Actions Menu**, and then click **Edit**, or click the **Edit** icon. The **Edit Security Group** window displays.

Edit Security Group

Created by **sthem** on 5/21/15 Last updated by **ORCE-Admin** on 6/14/19

Group ID3

* Group NameGROUP-LR-Specialists

Active☒

Default Privilege

☐ Read/Write

☐ Read Only

☒ Limited Read

☐ No Access

Assign Users

Actions ▾

+

×

No Users available to display

Cancel

OK

Figure 10-40: Edit Security Group

- The following fields are editable:
 - Group Name
 - Active
 - Default Privilege
- You may edit the assigned users section to **Add** new, or **Remove**, any existing users.
- Select **OK** to save or **Cancel** to exit.